

LOAN MANAGER  
DOCUMENTATION  
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**Contents**

INTRODUCTION .....	2
SYSTEM FEATURES.....	2
REQUIREMENTS .....	2
INSTALLATION .....	3
Change Database Parameters.....	3
Change Time Zone .....	3
Change System Status (Application Environment).....	4
Uploading Files to Server .....	4
Testing .....	4
CUSTOMER SUPPORT .....	4

## **INTRODUCTION**

Loan Manager is fully functional PHP loan management system. Loan Manager can be used to manage borrowers from first steps of loan acquisition to loan repayments. Loan Manager simplifies the process by automating the tasks involved like auto calculations of interests using standard methods within and preparing amortization schedule (Repayment Schedule).

## **SYSTEM FEATURES**

- Easy Installation steps
- Supports Borrowers Login
- Friendly user Interface
- Supports bootstrap 3+
- Manages borrowers' personal and financial information
- Manages different loan categories
- Manage Loan Disbursement Process (Application to Approval – from Loan Officer level to Supervisor/Admin)
- Auto Interest calculations using inbuilt standard methods (Straight Line, Reducing Method, Compound Interest Method)
- Auto preparations of amortization/repayment schedules(Monthly, weekly or biweekly)
- Easy Company Settings
- Manage Loan Repayments (View Expected Repayments, Receive Repayments, View Overdue repayments and View Defaulted Loans)
- Sending Email Reminder for expected repayments
- Can export reports into PDF and Excel formats
- Staffs access levels (Admins, Loan Officers and Supervisors)

## **REQUIREMENTS**

Loan Manager needs minimum requirements below to work:

- PHP 5.6+
- MySQL 5.x
- Web Browser (Mobile or Desktop)
- Code Editor(For Changing some settings in source code)

## ➤ Knowledge of PHP Object Oriented Programming

### INSTALLATION

Before installing Loan Manager into your server you will have to change the following important things:

#### Change Database Parameters

Create MySQL database using any of your favorite MySQL management system example PHPMyadmin. After creating your database, import LoanManager.sql file from 'database' folder found in source code main folder you downloaded.

Now open database.php file found in 'application/config/database.php' and change the following parameters:

```
$db['default'] = array(
    'dsn' => '',
    'hostname' => 'localhost',
    'username' => 'DATABASE_USER_NAME',
    'password' => 'DATABASE_PASSWORD',
    'database' => 'DATABASE_NAME',
    'dbdriver' => 'mysqli',
    'dbprefix' => '',
    'pconnect' => FALSE,
    'db_debug' => (ENVIRONMENT !== 'production'),
    'cache_on' => FALSE,
    'cachedir' => '',
    'char_set' => 'utf8mb4',
    'dbcollat' => 'utf8mb4_unicode_ci',
    'swap_pre' => '',
    'encrypt' => FALSE,
    'compress' => FALSE,
    'stricton' => FALSE,
    'failover' => array(),
    'save_queries' => TRUE
);
```

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Enter your database username, password and database name.

#### Change Time Zone

Open index.php file and replace 'Africa/Nairobi' from the following line with your timezone

```
ini_set('date.timezone', 'Africa/Nairobi');
```

### Change System Status (Application Environment)

Open index.php file and find this line below and replace 'development' with 'production' if you are hosting the system in production environment, or 'testing' if you are in 'testing' server

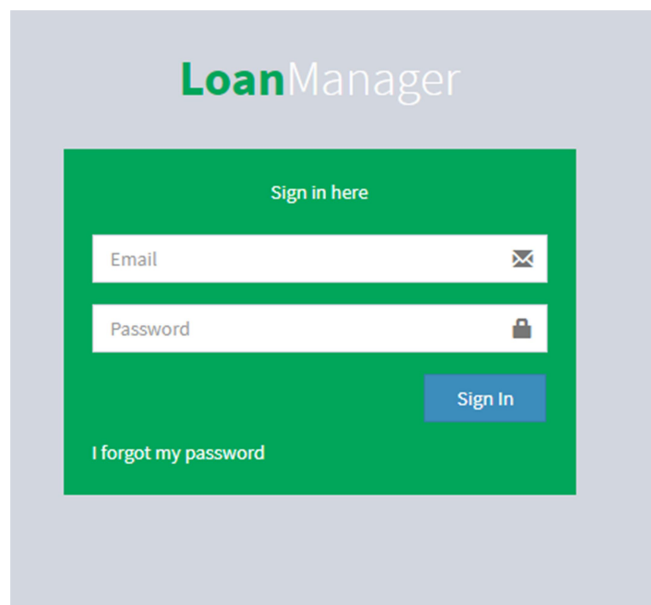
```
('ENVIRONMENT', isset($_SERVER['CI_ENV']) ? $_SERVER['CI_ENV'] :  
'development');
```

### Uploading Files to Server

After doing the changes above it is time to upload Loan Manager files to server. Using any FTP client, upload all Loan Manager files you downloads except this documentation and database folder to your server public directory eg: public\_html folder

### Testing

After uploading all files required open your server ip address or domain name in browser, you will see the following login screen



Enter: "[admin@demo.com](mailto:admin@demo.com)" as email address and Password: "admin" to start using the system

### CUSTOMER SUPPORT

In case you need any help which is not covered in this document, email us at [xebusinesshaven@gmail.com](mailto:xebusinesshaven@gmail.com), we will try to respond to your enquiry within 2 business days.

