



Financial Services Portal

- MANUAL
- Designed By:–Xhitiz IT Solution,
Raipur(C.G.)

Table of Contents

- Introduction
- Enquiry Process
- Client Registration
- Admin and Supervisor Dashboard
- Employee Task Graph
- Enquiry and Client
- Roles of Admin and Supervisor
- Clients List Report
- Enquiry List
- Client List
- User Management
- Roles Employee
- Employee Dashboard
- Dashboard of Client

Introduction

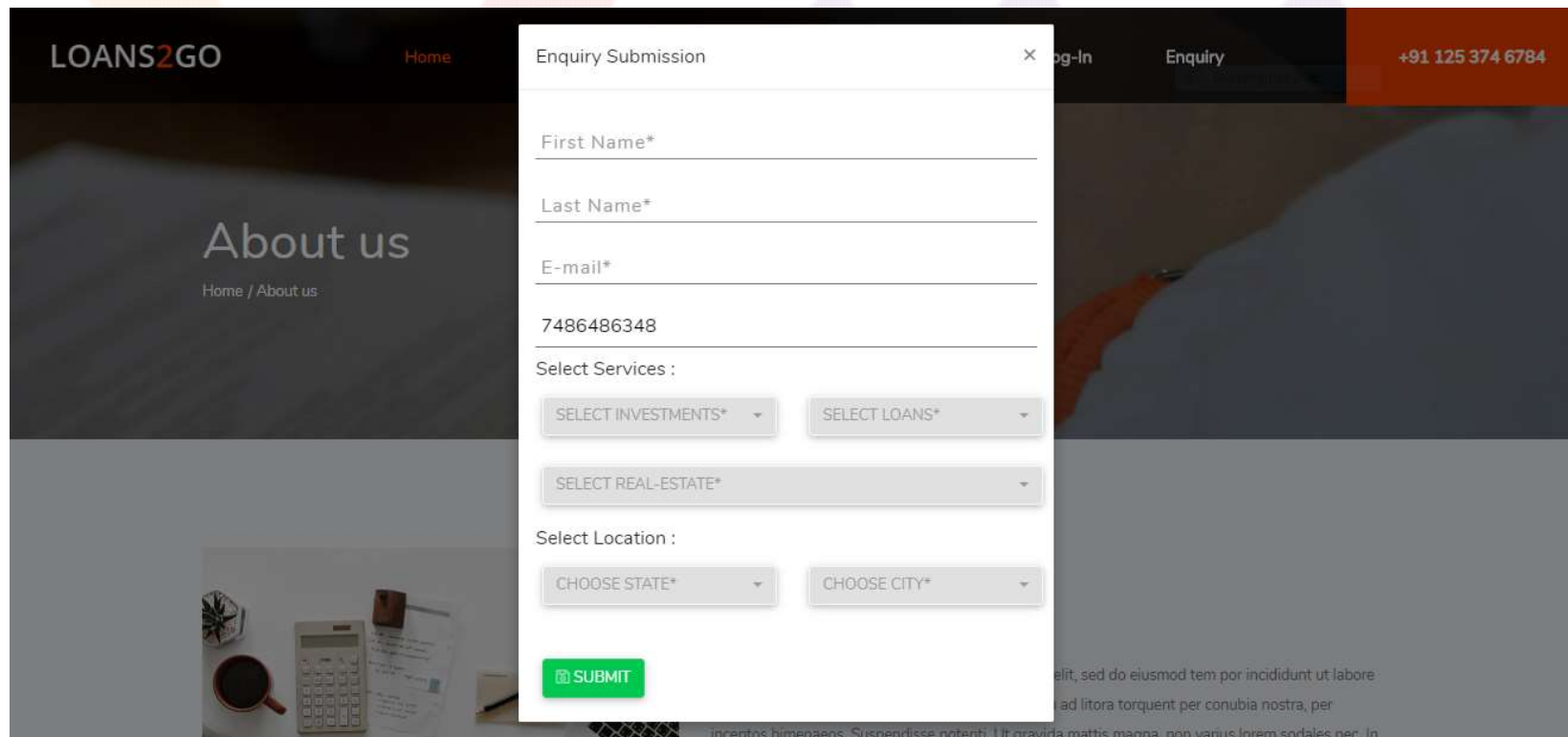
If we talk about the financial services, it is the branches of different banking like – financial advice, insurance, investment. The financial services provided by the financial industry are the economic services, which encircle a high range of businesses that lead money including credit-cards companies, banks, credit-unions, accountancy companies, insurance companies, consumer-finance companies, stock brokerages, investments funds, government enterprises and many more.

OUR OBJECTIVES FOR FINANCIAL SERVICES:

- In the **financial system** it maintains public confidence.
- Make easy the cautions of financial crimes.
- Increase the development of the financial service sector.

Enquiry

- Customer generates enquiry from portal
- Request for services that he want
- Submit registration details



The screenshot displays the LOANS2GO website with a dark header. The header includes the logo 'LOANS2GO', a 'Home' link, a 'Log-In' link, an 'Enquiry' link, and a phone number '+91 125 374 6784'. The main content area shows an 'About us' section with the text 'Home / About us'. Overlaid on this is a white 'Enquiry Submission' modal form. The form contains the following fields and options:

- First Name*
- Last Name*
- E-mail*
- 7486486348
- Select Services :
 - SELECT INVESTMENTS* (dropdown)
 - SELECT LOANS* (dropdown)
 - SELECT REAL-ESTATE* (dropdown)
- Select Location :
 - CHOOSE STATE* (dropdown)
 - CHOOSE CITY* (dropdown)
- A green SUBMIT button with a document icon.

Client Registration

- Admin, Supervisor and Employee has the authority to register enquiry as client or decline it
- They also has the authority to View and Edit client details

ADMIN

Dashboard

OPTIONS

- Registration
- Management
- Report

Client Registration Form: Step 1/3

Step-1

Personal Information : (All Details Should be as per KYC)

First Name* Last Name*

Father's Name* Mother's Name*

E-mail* Date of Birth*

Spouse Name Anniversary Date

Mobile Number* Alternate Mobile Number Pan Number*

Select Gender* Select Education*

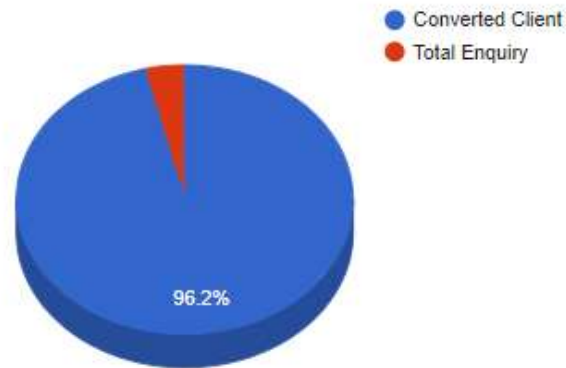
Income Tax Return Type :

ITR ☐ Form 16 ☐ None ☐

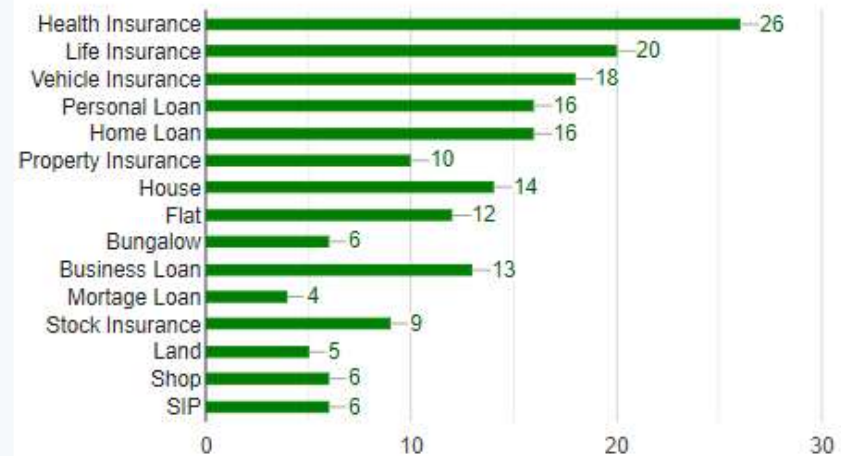
Select Services :

Admin and Supervisor Dashboard

Enquiry To Client Percentage



Services Graph



Employee Task Graph



This graph represents number of services assigned to the employees

Enquiry & Client

Enquiry & Client

NUMBER OF ENQUIRY

26



NUMBER OF CLINTS

28



Services & Employee

NUMBER OF SERVICES

15



NUMBER OF EMPLOYEE

3



Roles of Admin and Supervisor

- Admin has the authority to register Supervisor and Employee
- Supervisor has the authority to register Employee
- Every role of this portal can activate and block their below level designation user except employee
- And above all has the authority to register client directly from portal
- Admin and Supervisor has the authority to create service and service status and their updation, deletion
- Admin and Supervisor has the authority to assign employees for the clients
- Any role of this portal can continue registration process of client in which phase they left

Clients List Report

- Only Admin and Supervisor has the authority to generate clients list report

Service Management: [View Service Management Report](#)

Client List:

[Excel](#) [Print](#) [PDF](#) [Copy](#) [CSV](#)

Show entries Search:

#	Client Name	Mobile	E-mail	Sex	Created At	Updated At
28	Suyash Kumar	8944949449	suyash@gmail.com	Male	27-Jun-2020	27-Jun-2020
27	Sanjay Kumar	6798966466	sanjay@gmail.com	Male	27-Jun-2020	15-Jul-2020
26	Ajay Kumar	7994646641	ajay14@gmail.com	Male	27-Jun-2020	15-Jul-2020
25	Rajendra Kuamr	7994666616	raj@gmail.com	Male	27-Jun-2020	27-Jun-2020
24	Wagis Kumar	8994944994	wagis12@gmail.com	Male	27-Jun-2020	04-Jul-2020
23	Rakesh Kumar	8646469547	rakesh@gmail.com	Male	28-Jun-2020	30-Jun-2020
22	Ramesh Kumar	8654664444	ramesh12@gmail.com	Male	28-Jun-2020	30-Jun-2020
21	Pradeep Kuamr	8616116161	pradeep12@gmail.com	Male	29-Jun-2020	30-Jun-2020
20	Rakesh Kumar	8646469548	rakesh155@gmail.com	Male	30-Jun-2020	03-Jul-2020
19	Ekta Khan	6664469978	ekta@gmail.com	Male	02-Jul-2020	03-Jul-2020

Showing 1 to 10 of 28 entries Previous **1** 2 3 Next

Enquiry List

Enquiry List:

Show entries

Search:

#	Name	mobile	email	state	city	Created At	Updated At	Action
1	Testingfin Testfinf	9344535123	testfina@gmail.com	BIHAR	GAYA	15-Jul-2020	15-Jul-2020	Create Client Cancel
2	Testingenq Kumar	6333673289	testingenq@gmail.com	CHHATTISGARH	KANKER	15-Jul-2020	15-Jul-2020	Registered
3	Teste Kumar	8187262362	teste@gmail.com	DAMAN AND DIU	DIU	15-Jul-2020	15-Jul-2020	Registered
4	Saeed Kuamr	6545454423	saeed@gmail.com	CHHATTISGARH	KANKER	15-Jul-2020	15-Jul-2020	Registered
5	Tester Testing	8777764476	tester@gmail.com	DAMAN AND DIU	DAMAN	15-Jul-2020	15-Jul-2020	Registered
6	Sainath Kumar	8966679997	sainath@gmial.com	CHHATTISGARH	KANKER	15-Jul-2020	15-Jul-2020	Registered
7	Akhil Kumar	8679807982	akhil@gmail.com	CHHATTISGARH	KABIRDHAM	15-Jul-2020	15-Jul-2020	Registered
8	Anup Kumar	6879646464	anup51@gmail.com	DELHI	South East	04-Jul-2020	15-Jul-2020	Registered
9	Ankit Kumar	7977967766	ankit33@gmail.com	HARYANA	PANCHKULA	04-Jul-2020	04-Jul-2020	Registered
10	Ankita Kumari	8446464649	ankita44@gmail.com	CHHATTISGARH	DURG	04-Jul-2020	04-Jul-2020	Registered

Showing 1 to 10 of 26 entries

Previous 2 3 Next

Clients List

Client List:

Show entries

Search:

#	Client Name	Mobile	E-mail	Sex	Created At	Updated At	Action
1	Testingenq Kumar	6333673289	testingenq@gmail.com	Male	15-Jul-2020	15-Jul-2020	Continue Registration
2	Saeed Kuamr	6545454423	saeed@gmail.com	Male	15-Jul-2020	15-Jul-2020	Continue Registration
3	Teste Kumar	8187262362	teste@gmail.com	Male	15-Jul-2020	16-Jul-2020	Assign Employee Edit View Details
4	Akhil Kumar	8679807982	akhil@gmail.com	Male	15-Jul-2020	16-Jul-2020	Assign Employee Edit View Details
5	Sainath Kumar	8966679997	sainath@gmial.com	Female	15-Jul-2020	15-Jul-2020	Assign Employee Edit View Details
6	Tester Testing	8777764476	tester@gmail.com	Male	15-Jul-2020	16-Jul-2020	Assign Employee Edit View Details
7	Anup Kumar	6879646464	anup51@gmail.com	Male	15-Jul-2020	15-Jul-2020	Assign Employee Edit View Details
8	Ankit Kumar	7977967766	ankit33@gmail.com	Male	04-Jul-2020	04-Jul-2020	Continue Registration
9	Alok Kumar	6466164649	alok@gmail.com	Male	04-Jul-2020	04-Jul-2020	Continue Registration

Users Management

Service Management:

User List:

Show entries

Search:

#	User Name	Mobile	E-mail	Gender	Status	Role	Action
2	John Agent	9454654875	ajay.sahu@xhitiz.com	Male	Active	Employee	Block
3	Ajay Sahu	6678979878	ajaysahu@xhitiz.com	Male	Active	Supervisor	Block
4	Demo Agent	9165243126	demo@gmail.com	Male	Active	Employee	Block
5	Dhanush Kumar	6646464646	dhanush12@gmail.com	Male	Active	Supervisor	Block
6	Umesh Kumar	7587176287	umesh12@gmail.com	Male	Active	Employee	Block

Showing 1 to 5 of 5 entries

Rectangular Ship

Previous

1

Next

Roles of Employee

- Employee has the authority to register client and update, edit, continue registration process in which phase they left
- He can also register enquiry as client or reject it
- He update service status of client which is assigned to him

Update Service

×

Ajay Kumar-CLI0000003

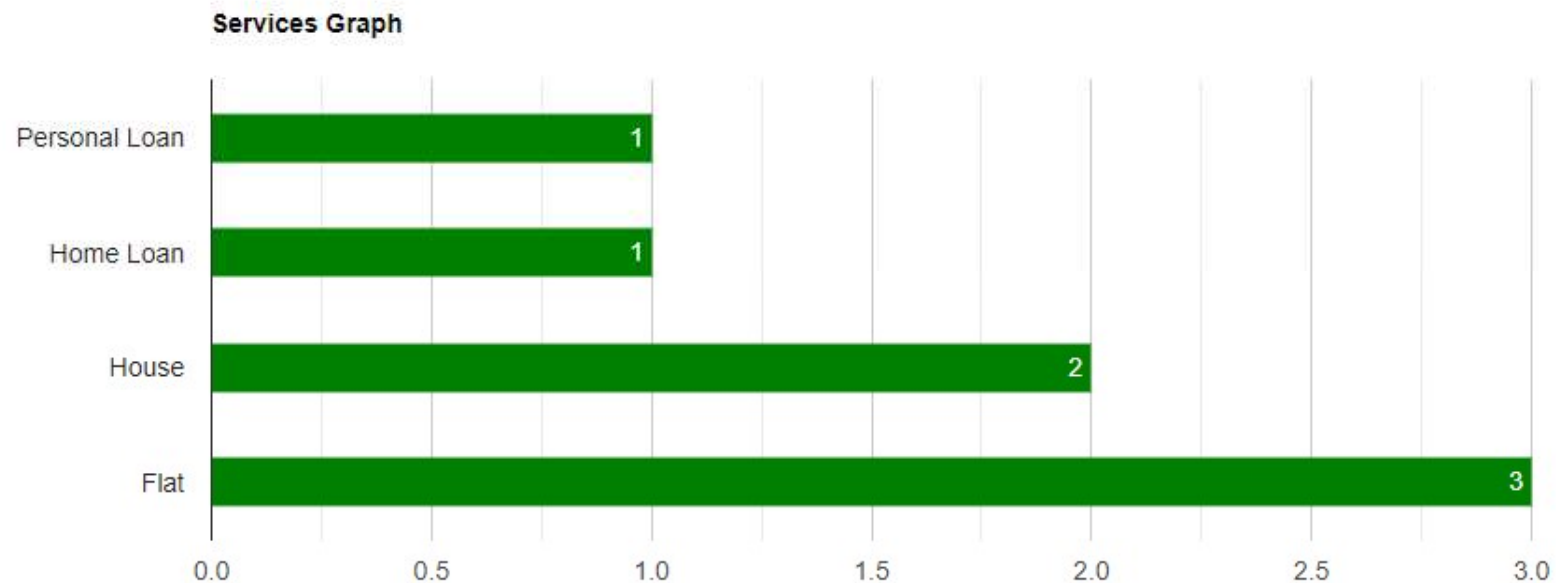
Service Name	Service Status History	Choose Service Status
Personal Loan	Submission->	Submission
		<div>Update</div>

Service Name	Service Status History	Choose Service Status
House	Submission->	Submission
		<div>Update</div>

Close

Employee Dashboard

Services



This graph represents number of services assigned to the employee

Dashboard of Client

- Client can view registration details from their account
- They can print their registration details

The screenshot displays a client dashboard with a blue sidebar and a light blue main content area. The sidebar includes a 'CLIENT' header with a user icon, a 'Dashboard' link, and an 'OPTIONS' section with a 'View Details' link and a back arrow. The main content area is titled 'Your Service Status' and lists four service categories: HEALTH INSURANCE, LIFE INSURANCE, HOME LOAN, and FLAT. Each category has a corresponding status bar with a right-pointing arrow. The HOME LOAN status bar shows 'Submission->' and the FLAT status bar shows 'Submission-> Payment->' and a 'Registration Slip' button.

CLIENT

Dashboard

OPTIONS

View Details

Your Service Status

HEALTH INSURANCE

LIFE INSURANCE

HOME LOAN

Submission->

FLAT

Submission-> Payment->

Registration Slip

THE END



Presented By: Xhitiz IT-Solution

Website: www.xhitiz.com

Contact: +91 9907507570