

# Income Growth Project: Loans and Payments Command Center

The "Return to IG Project Page" takes you back to the Income Growth page on the website.

The Loans and Payments menu has link to this page and to a Loans per month report.

## SEARCH FORM

[Return to IG Project Page](#)

Loans and Payments: [Search/Edit/Add ALL Loans & Payments](#) | [Loans per Month](#)

ClientID	<input type="text"/>
First Name	<input type="text"/>
Last Name	<input type="text"/>
Loan Date AFTER	<input type="text"/>
Loan Date BEFORE	<input type="text"/>

SEARCH

Enter an exact ClientID and/or First/Last Name and a date or range of dates of when the Loan or Grant was provided. To see all loans and grants made in 2020, enter 12/31/1919 in the **Loan Date AFTER** field and 1/1/2021 in the **Loan Date BEFORE** field.

To view **all** loans and grants provided to **all** clients in the database, enter nothing in the search fields.

Payment data in the database will exist only for Loan Payments.

The report will be listed in order of ClientID:

If the Sum of Payments is \$0, there will be no Payment Details. If you click on Payment Details when there are no payments, you will be given a link to return to the Search Form.

[Search Again](#) [Download Data](#)

ClientID	First Name	Last Name	LoanID	Type	Loan Date	Loan Amount	Repay Start Date	Monthly Repayment	Sum of Payments	Loan Balance				
I100	Yuri	Feliciano	I100G	G	1/4/2021	\$76.13		\$0.00	\$0.00	\$76.13	<a href="#">Add Loan</a>	<a href="#">Add Payment (this Loan)</a>	<a href="#">All Payments Details</a>	<a href="#">Edit</a> <a href="#">Delete</a>
I101	Paul Terry	Garcia	I101OG	OG	9/17/2020	\$128.26		\$0.00	\$0.00	\$128.26	<a href="#">Add Loan</a>	<a href="#">Add Payment (this Loan)</a>	<a href="#">All Payments Details</a>	<a href="#">Edit</a> <a href="#">Delete</a>
I101	Paul Terry	Garcia	I101OG1	OG1	9/17/2020	\$64.24		\$0.00	\$0.00	\$64.24	<a href="#">Add Loan</a>	<a href="#">Add Payment (this Loan)</a>	<a href="#">All Payments Details</a>	<a href="#">Edit</a> <a href="#">Delete</a>

Every Loan or Grant has a unique LoanID so that any payments made will be grouped with that specific Loan. The LoanID is the ClientID plus the Type of Loan/Grant. For example, Client I101 has a Grant, type G. So the LoanID is I100G. Client I101 has two grants: the first is type OG and the second is type OG1. The two distinct LoanIDs are I101OG and I101OG1. These are Grants, so while there is a Date and an Amount for the Grants, there is no Repayment Start date, no Monthly Repayment Amount, no sum of all payments made, and the Loan Balance is the same as the Amount of the Grant.

As of the creation of these instructions, only Grants have been provided to Income Growth clients. So the examples illustrating Payments and Adding Loans will use "test" data, not data from actual clients. The ClientID of a test client is I118. So here is the report if we search for only ClientID 118. As shown below, Client I118 has one Grant in the amount of \$50 and a Loan for \$200. The client made one payment toward the Loan of \$27, so the balance is now \$173. The Grant line has a mistake: it is a Grant, so there should be NO monthly repayment. We are going to fix that.

If the Sum of Payments is \$0, there will be no Payment Details. If you click on Payment Details when there are no payments, you will be given a link to return to the Search Form.

[Search Again](#) [Download Data](#)

ClientID	First Name	Last Name	LoanID	Type	Loan Date	Loan Amount	Repay Start Date	Monthly Repayment	Sum of Payments	Most Recent Payment	Most Recent Payment Amount	Loan Balance				
I118	AASample	AATEST	I118L1	L1	10/10/2020	\$200.00	11/10/2020	\$10.00	\$27.00	11/12/2020	\$12.00	\$173.00	Add Loan	Add Payment (this Loan)	All Payments Details	
I118	AASample	AATEST	I118OG	OG	12/18/2020	\$50.00	12/24/2020	\$2.00					Add Loan	Add Payment (this Loan)	All Payments Details	

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**EDIT a LOAN or GRANT:** At the end of the line for LoanID I118OG, is a link to **Edit** (or **Delete** to remove it from the database completely – Careful!). Click on Edit to see the details of this Grant. Because there are only a few fields in this report, we can edit the fields right in place without bringing up a form on a separate page:

ClientID	First Name	Last Name	LoanID	Type	Loan Date	Loan Amount	Repay Start Date	Monthly Repayment	Sum of Payments	Loan Balance				
I118	AASample	AATEST	I118L1	L1	10/10/2020	\$200.00	11/10/2020	\$10.00	\$27.00	\$173.00	Add Loan	Add Payment (this Loan)	All Payments Details	
I118	AASample	AATEST	<input type="text" value="I118L"/>	<input type="text" value="O"/>	<input type="text" value="12/18/2020"/>	<input type="text" value="50"/>	<input type="text" value="12/24/2020"/>	<input type="text" value="2"/>	<input type="text" value="0"/>	\$50.00	Add Loan	Add Payment (this Loan)	All Payments Details	<input type="button" value="UPDATE"/> <input type="button" value="CANCEL"/>

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Change the Monthly Repayment from “2” to “0” and UPDATE. The results are now correct.

If the Sum of Payments is \$0, there will be no Payment Details. If you click on Payment Details when there are no payments, you will be given a link to return to the Search Form.

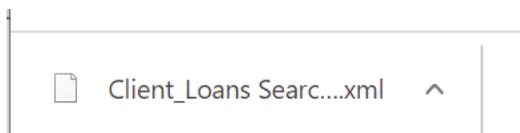
[Search Again](#) [Download Data](#)

ClientID	First Name	Last Name	LoanID	Type	Loan Date	Loan Amount	Repay Start Date	Monthly Repayment	Sum of Payments	Most Recent Payment	Most Recent Payment Amount	Loan Balance				
I118	AASample	AATEST	I118L1	L1	10/10/2020	\$200.00	11/10/2020	\$10.00	\$27.00	11/12/2020	\$12.00	\$173.00	Add Loan	Add Payment (this Loan)	All Payments Details	
I118	AASample	AATEST	I118OG	OG	12/18/2020	\$50.00	12/24/2020	\$0.00					Add Loan	Add Payment (this Loan)	All Payments Details	

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**All Payments Details** LoanID I118L1 is a Loan and Payments have been made. Click on All Payments Details to review.

The report shows that two payments have been made, one for \$15 in October and one for \$12 in November. Look again at the previous report above. The Sum of Payments is a total of these payments, \$27.00. The report also shows the most recent payment date and amount, \$12 on 11/12/2020.



**Download Data:** You may wish to click on Download Data to get a copy of this client’s loan payments in an EXCEL spreadsheet. The filename appears at the bottom of your browser; when you click on the filename, EXCEL opens the file. The filename will have today’s date appended so that you

can’t overwrite a previous file of the same name on your computer. Downloading data is also a way to backup data.

This is the example EXCEL sheet for this client.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	ClientID	First Nam	Last Nam	LoanID	Type	Loan Date	Loan Amo	Repay Start	Monthly R	Sum of Pa	Most Recen	Most Recr	Loan Balance
2	I118	AA	Sample AATEST	I118L1	L1	10/10/2020	\$200.00	11/10/2020	\$10.00	\$27.00	11/12/2020	\$12.00	\$173.00
3	I118	AA	Sample AATEST	I118OG	OG	12/18/2020	\$50.00	12/24/2020	\$2.00				

ClientID    LoanID  
 I118        I118L1

Date \*      12/12/2020

Amount \*    10

Check #     

Copy of Check     No file chosen

**Add Payment (for this loan)** To add another loan payment, press Add Payment. Note that the ClientID and LoanID will match this client and loan data. Enter Date, Amount as required fields. Check# is optional.

If you wish to scan and store a copy of the check, press Choose File and upload the check image from your computer. Press Submit.

ClientID	LoanID	Type	Loan Date	Loan Amount	Status	Repay Start Date	Date	Amount	Check #
I118	I118L1	L1	10/10/2020	\$200.00	D	11/10/2020	10/14/2020	\$15.00	12222
I118	I118L1	L1	10/10/2020	\$200.00	D	11/10/2020	11/12/2020	\$12.00	1212
I118	I118L1	L1	10/10/2020	\$200.00	D	11/10/2020	12/12/2020	\$10.00	

Records 1-3 of 3

The new payment appears as the third payment in the record of payments. Note, however, that the Sum of Payments and Most Recent Payment Date and Amount, will not appear in the Loan record immediately. The update to the Loan is run automatically every hour to sum the payments for the Loan report.

**Add a Loan:** From the Loans Report, a Staff Worker can also add a new loan or grant. When you click on Add Loan, a data entry form will remember the ClientID, but you must add the LoanID. Remember that the LoanID is ClientID plus Type, such as I118L2. A Partial form is shown here. This is not a form for the Client to fill out. The complete form is found at: <https://c2abz574.caspio.com/dp/7c60900065ed7735e67b470e8e22?ClientID=Ixxxx> where you must first fill in the ClientID.

Loan Information

For new LoanID, enter ClientID followed by Type, as in I118L1.

ClientID                      LoanID \* (?)                      Type \*

Worker

Loan Date \*                      Loan Amount \*                      Repay Start Date                      Monthly Repayment

Use

Arrears Situation

Rent                                      Rent Owed

Reason

Eviction Prevention     Moving Expense     Utilities     Food     Books/School Fees     Foreclosure Prevention

OBP                      Court Case                      marshals date

Check if YES