**LOCKMINDS COMPANY LIMITED**

**Installation and User Instructions**

**Hisazangu**

**Web based & Android software application**

January 2020  
Version 1.0

**LOCKMINDS COMPANY LIMITED**

**DISCLAIMER**

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**TRADEMARKS**

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2. **INTRODUCTION**
   1. **Software Overview**

Hisazangu is a web based software application which can also be access through android, on which the Broker, Companies and Investor interact, for the main purpose of *Buying* and *Selling* Shares. The software has different features and functionalities to be accessed by both sides, the **Broker** and the **Client** (Investor) with a convenient and supportive User friend Interfaces that having different menus, links, icons and more instructed details. The hisazangu can assembly Investors at one point where they can query for the company which need to sale their shares through the standard broker who knows well and accurate information concerning share market. Therefore Investors access a cross cutting of searching and escape wasting time from acquiring irrelevant information. Hisazangu is also integrated with Dar es salam Stock Exchange (DSM) database for verifying and completing some request and software system actions.

* 1. **Technology used**

The Software hosted and launched through the vender’s server (Lockminds servers) and it can be accessed on normal web (browser) or android. Hisazangu is among the current generation software, good and standard, user friend and kept in problem solving environment.

* 1. **Software Architecture**

Web development side – made using PHP, Ajax and CSS.

Android side – made using JAVA and XML.

Database – made using MySQL DBMS with a support of xampp server.

* 1. **Broker Mode**

The Broker is the owner of the launched software, all functionalities, time to time access and users are get to be managed by a broker. Broker is also a system administrator on which controls the user registrations, user profiles, user requests (transactions & orders), user comments and company details as well. Broker in a collaboration with software developer, can update or change some features to the system.

* 1. **Investor Mode**

The Investor here is a Client, the one who need to buy share from a company or to sale share to company. Investor has to register to the system under the control of the broker so as to get credentials which will all him/her to log in to the system. Investor also has to update the profile there after can enter dcds account (from DSE) provided by broker that will allow Investor to do transactions and the to place orders.

1. **QUICKSTART GUIDE FOR BROKER**
   1. **Starting Hisazangu and logging in with a Broker account**

* The URL (browser address) path is [www.hisazangu.co.tz](http://www.hisazangu.co.tz) as a specific domain for hisazangu accessing software on a broker mode.
* The Authentication page will be resulted soon after loaded by browser, at which user will enter the username and password the user will log in to the system.
* There is a Reset button for in case user forget username or password, on which user prompted to enter email address so as the admin will send email to show instruction on how to access the user account.
  1. **Hisazangu Broker view**

After broker get logged in to the system, the Dashboard will be displayed with different menus (Orders, Transactions, Investors, Companies, Users) at the top of the page. Also Investor at this page is able to see the pending processing and order details, he/she can choose to logout if there is nothing else to do.

* 1. **Hisazangu Broker View – Users**

This is the menu at which the logged-in broker can see the list of all registered users, and can register a new user using specific user credentials. The complete registered user can login to the system and get access.

* 1. **Hisazangu Broker View – Investors**

This is the menu in which the logged-in broker can see the pending registration of investors, complete registered investors with their dcds accounts, and can also see all (pending & registered) investors, and can take printout or download a file (pdf & excel) showing those details.

* + 1. **Updating Profile**

The broker, through the details link, can see the deals of a particular investor where also broker can update the profile of that investor, send a file to the investor’s email address, view the orders made by that investor and can also deactivate the investor.

**2.4.1 Verifying DCDS Account**

The broker can verify the investor with an updated dcds account.

* 1. **Hisazangu Broker View – Companies**

This is the menu in which the logged-in broker can see the list of ready registered share companies to the hisazangu with their more details like company profile, company share information, charts (daily price & daily turnover graphs), financial statements, market with date-opening price-closing price, and can take printout or download a file (pdf & excel) showing those details. Here broker also is able to register a new company with particular credentials.

* 1. **Hisazangu Broker View – Transactions**

This is the menu in which the logged-in broker can see the transactions made by the investor (deposit & withdraw) with transactions details. Broker here can see only the pending, or completed, or cancelled transactions, and can take a printout or download a file (pdf & excel) showing those details. Broker after receiving the transaction, can activate so as to make it complete or leave it pending, can cancel the traction. For the cancelled transactions, broker has to write the reason of cancelling.

* 1. **Hisazangu Broker View – Orders**

This is the menu in which the logged-in broker can receive the orders placed by investors and can leave the order pending or can activate the order so as to make it complete. The details concerning to the placed order also indicated here, broker can take a printout or download a file (pdf & excel) showing those details.

* 1. **Log out**

The logged-in broker user can go dashboard menu and then log out from the system if there is nothing to do.

1. **QUICKSTART GUIDE FOR INVESTOR**

**3.1 Starting Hisazangu**

* The URL (browser address) path is [www.portal.hisazangu.co.tz](http://www.portal.hisazangu.co.tz) as a specific domain for hisazangu accessing software on an investor mode.
* The authentication page will be resulted soon after loaded by browser, at which user (investor) will either login if already registered or go to register as new user.
* There is a Reset button for in case user (investor) forget username or password, on which user prompted to enter email address so as the admin will send email to show instruction on how to access the user account.
  1. **Register**

For a new registration, user (investor) has to fill in the particulars like full name, email address, bank name, bank account, identity type, identity card number and password. After registering and activated by a broker, user (investor) will receive confirmation email which also show the username and password for logging-in. On that email user (investor) will be reminded to login and update the profile at *ACCOUNT* menu, fill in other particulars together with a dcds account which will be verified by a broker to allow investor to do transactions and placing orders.

* 1. **Log in**

For a ready registered user (investor), has to use the username (email address) and password to login to the system and access the software.

* 1. **How to Update your personal data (Profile)?**

The logged-in user (investor) has to go to the *ACCOUNT* menu at the top of the opened page dashboard page, in which will get the page of filling his/her other information including dcds account and then update the profile. When profile get updated, broker can verify the user (investor) then allowing to do transactions and placing orders.

* 1. **Dashboard**

The dashboard is the page to be opened soon after the Investor get logged-in, it shows the available basic menus (ACTIVITIES, TRADING, PORTFOLIO, WALLET and ACCOUNT). The Investor also here can see the list of registered companies with their particular details like market-information-chart-financial statement and can buy or sale shares, see the market summary and total market capital.

* 1. **Wallet Deposit**

The Investor, after clicking the *WALLET* menu, now he/she can do a transaction (deposit or withdraw) and can see the transactions history. For a deposit, at the left of the page there is a link (deposit link) which open the deposit form in which Investor has to fill in the bank, method, amount, reference and submitting the form so as to deposit money which will be received and activated by the broker. This amount of money deducted from Investor account, will keep Investor in ready position to place an order once after deposit and having desirable balance to the broker account.

* 1. **Wallet Withdraw**

The Investor, after clicking the *WALLET* menu, now he/she can do a transaction (deposit or withdraw) and can see the transactions history. For a withdraw, at the left of the page there is a link (withdraw link) which open the withdraw form in which Investor has to fill in the amount for withdrawing as since the bank of which money will be received has yet indicated above the form, then he/she can submit the form so as to withdraw (ready deposited) money from the broker account.

* 1. **Trading Buy share**

The TRADING is among the top menus, at which Investor can buy share, sale share or do a wallet (deposit/withdraw). Trading shows the list of registered companies (with a Buy share heading) which have shares and allowing Investor to buy shares by clicking on *Buy icon* of a particular company, then it will open the form in which Investor has to fill in the price, investment amount and comment (optional) since the order by default will be processed without using market price or has chosen to process the order using market price by clicking at Off to make it On. Then the price and investment amount will be calculated to give-out the number of shares, fees, investment and total and now the Investor can Place the order which will be received and verified by the broker so as to make the Investor buying the number of shares. This can only be done if the Investor has desirable balance which allow him/her to buy shares.

* 1. **Trading Sale share**

The TRADING is among the top menus, at which Investor can buy share, sale share or do a wallet (deposit/withdraw). Trading shows the list of registered companies (with a Sell share heading) of which its shares already bought by the Investor, therefore Investor can sell the share by clicking at *Sale icon*, form will be displayed to allow Investor to fill in number of shares to be sold and price and from which company. Then broker will verify the selling order and search & sell to other Investor.

* 1. **Investor Activities**

The ACTIVITIE is among the top menus, at which Investor the information of his/her total current shares, cash balance and investment. Also Investor can see the details of pending and completed orders (buy & sell) as appeared with their dates due, type, status and action with a link of details to show more information about a particular order of which the Investor can post a comment. The Investor can see other information like company name, market price, total investment, amount shares, cash, gain and loss at PORTFOLIO menu.

* 1. **Log out**

The logout is among the top menu, it only used once user need to sign out of the system. Apart from the logout menu, Investor can sign out the system by clicking the logout link which available at the pages of other menus (ACTIVITIES, TRADING, PORTFOLIO, WALLET) at the left of such menu pages.

1. **BASIC SETTINGS**
   1. **Add Company**

Only the broker can add a new company by registering a company. In order to add a new company which will sell its shares, broker after get logged-in has to go to *Companies menu* then *Register link* (ie. Companies­­->Register) and the “register a company” form will be resulted in which broker has to fill in the details and information about that new company like company name, company type, contacts, company summary then submit form to register a company. The added company will be listed in the list of companies.

* 1. **Add Broker’s User**

Brokers get access to the broker portal, there can be many users at the same portal login-in with different credentials but accessing the same pages and data. In order to add a new user here, the logged-in broker at that moment (or admin) has to go to the *Users menu* then *Register user link* (ie. Users->Register user) and the “register user” form will be resulted in which broker has to fill in the details and information about that new user like names, contacts, username, password then submit form to register user. The added user will be listed in the list of users and can login using such username and password given/entered during registration process.

* 1. **Add Client (Investor)**

For a new registration, user (investor) has to go to the *Register link* at the authentication page which comes after user access the Investor’s address (URL) and fill in the particulars like full name, email address, bank name, bank account, identity type, identity card number and password. Broker can go to the *INVESTORS menu* and view the details of the registered Investor (Action) at where broker can update the Investor’s profile, deactivate the Investor, verifying the dcds account, see Investor’s placed orders and also can upload files to the Investor.

* 1. **Activating New Transaction**

Only broker can do activating the new transactions. Broker has to go to the *Transactions menu* and click on *Pending link* then the pending requested transactions will be displayed were broker can choose to view the details (Action) of one transaction of which broker can **Accept Process** to activate the transaction.

* 1. **Activating New Placed Order**

Only broker can do activating the new orders. Broker has to go to the *Orders menu* and click on *Pending link* then the pending requested orders can **Receive Order** and **Process Transaction** to activate the order.

* 1. **Cancelling Request**

Only broker can do cancelling the request. Broker has to go to the *Transactions menu* or *Orders menu* and click on *Pending link* then the pending requests will be displayed were broker can choose to view the details (Action) of one request of which broker can **Cancel Process** to cancelling a request.

* 1. **Remove Broker’s User/Investor**

Only broker can do removing users. Broker has to go to the *Users menu* and click on *Listed users link* then the table showing all user will be displayed on which broker can **edit** or **delete** (at Action) so as to remove the particular user. Also broker can go to the *Investors menu* then *Investors link* to see list of registered investors, then broker can choose to view details of one investor (at Action) were broker can deactivate the registered investor.

1. **DATABASE**

The software as it has been developed using Mysql database management system, users (broker and investor) have fill in data, to work with the data and to update or remove data to/from the tables of the software’s database.

* 1. **Data Manipulation**

In hisazangu, broker has to enter data according to companies and investor has to enter data according to requests made. All data thereafter can be verified, calculated, edited/updated and deleted.

* 1. **Data Integration**

The software integrated with banks (through bank accounts) for deposit & withdraw transactions, with DSE for dcds accounts and other share information, with identity issuing authorities and companies. This has to be done since there are some data accessible with the hisazangu software and other data sources.

* 1. **Exporting Data (to Excel, PDF or Printout)**

The data which accessible within hisazangu, can be exported to other storage locations in either softcopy or hardcopy forms. User (broker and investor) can download an excel file having data as accessed by user in a system or can download a pdf file of the same data, if user need hard copy of such data then user can take a print out of that portion of data.

* 1. **Backup and Restore**

All data manipulations which performed in the software, are saved ant maintained to the server. The developers (venders) has the copy of the same software in case software corrupt happen and also maintain the server for data backup. There for it is possible to restore data if required, by the collaborations and agreements between venders and broker (owner of the software) data backup and restore can be done.

* 1. **Upgrading a Database**

The software database can any time be updated in case of reducing or extending it as there will be introduction of new features & functionalities to the software or need of removing features. Therefore the database can be updated from the database tables and can be linked with other systems databases.

1. **SOFTWARE MAINTENANCE/UPGRADING**

For hisazangu, there will be periodic software upgrading and maintenance once there is a problem.

* 1. **Periodic time & Procedure**

The periodic time will be defined in the agreements between user (broker/owner) and developer (vender) and also some upgrades will be covered as soon required. Particular procedures of upgrading and maintaining the software will be introduced as the performing of such activities happening.

* 1. **Optional Features**

For the broker mode, the optional features are;

* Add new user
* Cancelling transaction
* Downloading excel or pdf files
* Updating investor profile
* Comments and Notifications

For the investor mode, the optional features are;

* Wallet history
* Updating middle name
* Order - Buy share using market price
* Order - Buy share reference
* Switching turn overs
* Comments and Notifications
  1. **Permanent Features**

The all remaining features on both broker mode and investor mode, are the permanent features.

* 1. **User side**

The user can do upgrading of user information as well as user data. User can upgrade the profile, balance (transactions), shares (orders), comments, company information and other user related data.

* 1. **Developer side**

The developer can do upgrading and maintenance of all the features, credentials, data details, functionalities and interfaces of the software as well as the database.

1. **APPENDIX: Licenses** **Agreement**