**LOCKMINDS COMPANY LIMITED**

**Installation and User Instructions**

**Hisazangu**

**Web based & Android software application**

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Version 1.0

**LOCKMINDS COMPANY LIMITED**

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

HisaZangu is an online system that is used by clients and brokers to sell, buy and manage shares. HisaZangu System is in two version, the first version is a web based version which can be accessed via a web on both computers, tablets and smart phones. The other version is an Android App Version which can be downloaded on Google Play store and get installed in Android Smart phones.

The software has different features and functionalities to be accessed by the **Broker** and the **Client** (Investor) with a convenient and supportive User friend Interfaces which has different menus, links, icons and more instructed details which makes the system to be easy to use and user friend. The HisaZangu can assembly Investors at one point where they can query for the company which is selling shares through the standard broker which has accurate information about the price of shares in the market.

* 1. **Technology used**

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.

SSL has been installed in a Web browser and high encryption standard being implemented to make it more secured.

* 1. **Software Architecture**

The HisaZangu Architecture is very simple.

We have the following:

1. **Server:** Stores Data for the Client (Investor) and Broker
2. **Broker:** Can easily access the web system
3. **Investor:** Has two options, he can use an android app or a web app
4. **Android App:** Resides on the server and can be accessed by the client/investor
5. **Web App:** Resides on the server and can be accessed by the client/investor and broker.
   1. **Broker Mode**

The Broker is the owner of the software, all functionalities and user management are managed by a broker. The Broker has the right to administer the system and manage user profiles, user requests (transactions & orders), user comments and company details as well. In this manner, the Broker in a collaboration with software developer can update or change some features to the system if any need arises.

* 1. **Investor Mode**

In this System, the Investor acts like a client. He comes in to buy or sell some shares. The Investor has to register to the system under the control of the broker. The Broker verifies the investor after going through the KYC data submitted in the system.

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).
* The Authentication page will pop up to allow the user enter some credentials which will take him in the system after successful login.
* There is a Reset button which allows the user to reset the credentials if at all he has forgotten the credentials and the instructions on how to reset this are sent to his/her email address.
  1. **Hisazangu Broker view**

After broker get into the system, the Dashboard will be displayed with different menus (Orders, Transactions, Investors, Companies and Users) on 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 active 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**

A registered user (investor) can 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 to fill other information including dcds account and update the profile. When profile is updated, the broker can verify the user (investor) by allowing him/her to do the transactions and placing orders.

* 1. **Dashboard**

The dashboard is the landing page after the users have successfully login into the app. From the Dashboard, the user can navigate to other pages trough the top menu and the shortcut menu, 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**

After clicking the *WALLET* menu, the investor can perform different activities including deposit and can see the transactions history. For the deposit on the Left Side of the page there is a link to (deposit) which the Investor has to fill in its 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 is deducted from Investor account.

* 1. **Wallet Withdraw**

After clicking the *WALLET* menu, the investor can perform different activities including withdraw and can see the transactions history. For a withdraw, on 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 shares, sale shares 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 shares, sale shares 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**

On the ACTIVITIES Menu, the investor can see 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**

The broker has the mandate to register a new company. The Menu (ie. Companies­­->Register) can be followed to register a company and the following details will be displayed for completion of this task. These are company name, company type, contacts and 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 in the same portal login-in with different credentials but accessing the same pages and data. In order to add a new user, the logged-in broker has to go to the *Users menu* then *Register user link* (ie. Users->Register user) and the “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. The 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**

Activating the transactions can be done by the broker after verification of the process through accessing the *Transactions menu* and clicking on *Pending link* then the pending requested transactions will be displayed where the broker can choose to view the details (Action) of one transaction of which the broker can **accept the Process** to activate the transaction.

* 1. **Activating New Placed Order**

The Broker is privileged to activate all new orders through *Orders menu* and then click on *Pending link* then the pending requested orders can **Receive Order** and **Process Transaction.**

* 1. **Cancelling Request**

Any request can be cancelled by the Broker. The Broker has to go to the *Transactions menu* or *Orders menu* and click on *Pending link* then the pending requests will be displayed. The broker can choose to view the details (Action) of the request and decide to cancel the requests.

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

The broker is privileged to remove all kinds of 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 the 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 has been developed by using Mysql database management system.

* 1. **Data Manipulation**

The Broker has to enter data according to companies and investor has to enter data according to requests made. Thereafter these data can be verified, calculated, edited/updated and deleted.

* 1. **Data Integration**

Later the software will be with banks (through bank accounts) for deposit & withdraw transactions. It will also be integrated with DSE for dcds accounts and other share information. Currently these information are done manually with reference numbers.

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

The data 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 are performed in the software are saved and maintained to the server. The developer (vendor) has the copy of the same software in case software fault.

* 1. **Upgrading a Database**

The software database can be updated in case of reducing or extending it as there will be introduction of new features and functionalities to the software.

1. **SOFTWARE MAINTENANCE/UPGRADING**

There will be a periodic software upgrading and maintenance once there is a problem or need of any new features.

* 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 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 the upgrading and maintenance of all the features such as credentials, data details, functionalities and interfaces of the software as well as the database.

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