**LOCKMINDS COMPANY LIMITED**

**HISAZANGU SOFTWARE - USER GUIDE**

**Contents:**

1. **Get started (general)**
2. **How to add user**
3. **How to register**
4. **How to add a company**
5. **How to update investor profile**
6. **How to modify user profile**
7. **How to activate dcds account**
8. **How to delete user / deactivate investor**
9. **How to deposit money**
10. **How to withdraw money**
11. **How to place an order (buy & sale)**
12. **How to view and interact with Consumer Staples as of particular date**
13. **How to activate transaction and an order**
14. **How to cancel a transaction**
15. **How to sign out of the system**
16. **GET STARTED (General)**

* User of hisazangu has to access the software using [www.hisazangu.co.tz](http://www.hisazangu.co.tz) address to get the broker mode or [www.portal.hisazangu.co.tz](http://www.portal.hisazangu.co.tz) address to get investor mode.
* After the desired mode is opened, the user has to log-in using username (email address) and password, both comes from the credentials entered when user registered himself initially.
* The broker and investor can either **modify** their information after login by clicking at *USERS menu* then *List of users link* (USERS🡪List of users) then click at edit icon displayed at a user details in all users table data at where user can also be deleted, or **update** their information by clicking at *ACCOUNT menu* and start to update information even add dcds account.
* The registered account of an investor can be verified by broker by clicking at INVESTOR menu then Investors link (INVESTORS🡪Investors) then click at details link available at investor details in all investor’s table data, here broker can update profile, verify dcds account or activate registered investor.
* After the investor has registered successfully and being approved, an email will be sent to the email address entered and after modifying dcds account also another modification email will be sent to his email.
* The broker has to add companies with their credentials and useful information so as to enable investor to view the company and place an order.
* The Investor has to do wallet deposit before placing an order, the investor account must has enough balance to allow placing orders. Investor also can withdraw the money deposited. The transactions and orders made by investor have to be activated by broker and broker also can cancel the transaction,
* The investor can buy available shares and can sell the shares and orders can be processed using market price (optional) or without using market price. Investor also can see gain & loss, order status & order details, the daily-weekly-monthly turnovers and charts.
* Both broker and investor have the portal of inserting comments regarding to transactions and orders.

1. **HOW TO ADD USER**

Steps:-

* Login as a broker
* Go to *Users* menu then *Register user* link
* Enter the new user particulars
* Click at *Register user* button
* New user will be added after the form submitted and has to user username (email address) and password to login to the system.

1. **HOW TO REGISTER (For an investor)**

Steps:-

* Click on *Register* link once after browser open the authentication page
* Enter the new user (investor) particulars
* Click at *Register* button
* New user (investor) will be added after the form submitted and has to use username (email address) and password to login to the system.

1. **HOW TO ADD A COMPANY**

Steps:-

* Login as a broker
* Go to *Companies* menu then *Register* link
* Enter the new company particulars
* Click at *Submit* button
* New company with its information will be added

1. **HOW TO UPDATE INVESTOR PROFILE**

Steps:-

* Login as a broker
* Go to *Investors* menu then *Investors* link
* Choose one from the listed investors then click at *details* link
* Click at *profile* then enter or edit information
* Click at *Update profile* button

**OR**

* Login as an investor
* Got to *Accoun*t menu
* Enter or edit information (including dcds account) then click at *Update profile* button

1. **HOW TO MODIFY USER PROFILE**

Steps:-

* Login as a broker
* Go to *Users* menu then *Listed users* link
* Click at *edit icon* displayed at a user details in all users table data
* Enter or edit information
* Click at *Modify user* button

1. **HOW TO ACTIVATE DCDS ACCOUNT**

Steps:-

* Login as a broker
* Go to *Investors* menu then *Investors* link
* Click at *details* link displayed at a user details in all users table data
* Update investor profile if not yet inserted the dcds account
* Click at *Verify DCDS Account*

1. **HOW TO DELETE USER/DEACTIVATE INVESTOR**

Steps for deleting user:-

* Login as a broker
* Go to *Users* menu then *Listed users* link
* Click at *delete icon* displayed on user details in all users table data
* Confirm to delete user

Steps for deactivating investor:-

* Login as a broker
* Go to *Investors* menu then *Investors* link
* Click at *details* link displayed on user details in all users table data
* Click at *ACTIVATE* (if not yet activated) *or DEACTIVATE* (if ready activated)

1. **HOW TO DEPOSIT MONEY**

Steps:-

* Login as an investor
* Go to *Wallet* menu
* Go to *Deposit* link
* Fill in the deposit form then click at *Submit* button
* The amount of money will be deposited to the broker account (has to be verified or activated by a broker)

1. **HOW TO WITHDRAW MONEY**

Steps:-

* Login as an investor
* Go to *Wallet* menu
* Go to *Withdraw* link
* Enter the amount then click at *Submit* button
* The amount of money will be deducted from the broker account and be sent to the investor registered bank account

1. **HOW TO PLACE AN ORDER**

Steps for Buy share:-

* Login as an investor
* Do a transaction deposit (if you do not have balance)
* Go to *Trading* menu
* Choose a company from the buy shares list and Click at *Buy icon* of a particular chosen company
* Order will be processed without using market price (if need a market price, Click at *OFF* to make it *ON* )
* Enter the Price, Investment and Comment (optional) then Click at *Calculate* button to view the number of shares, fees, investment amount and total
* Click at *Place Order*  button
* The order will be placed and has to be received and activated by a broker

Steps for Sale share:-

* Login as an investor
* Go to *Trading* menu
* Choose a company from the by shares list and Click at *Sale icon* of a particular chosen company
* Enter the number of shares and price
* Click at *Apply*  button to view the number of shares, fees, investment amount and total
* Click at *Order* button
* The order will be placed and has to be received and activated by a broker

1. **HOW TO VIEW & INTERACT WITH CONSUMER STAPLES AS OF PARTICULAR DATE**

Steps:-

* Login as an investor
* At the Dashboard, the list of all available companies will be displayed with their details.
* Click at a *View* link of a particular company to interact with Consumer Staples.
* Turnover, market details, company information, financial statement, charts and graphs will be exposed here.
* Zoom data portion in and out, and can be displayed for a daily, weekly, monthly basis or for a specific date.

1. **HOW TO ACTIVATE TRANSACTION / ORDER**

Steps for activating Transactions:-

* Login as a broker
* Go to *Transactions* menu then *Pending* link
* Choose a transaction from the list, Click at *Details* link
* Click at *Accept Process* button
* The transaction will be received and activated and by this the status now complete

Steps for activating Orders:-

* Login as a broker
* Go to *Orders* menu then *Pending* link
* Choose an order from the list, Click at *Details* link
* Click at *Calculate* button then *Activate* button
* The order will be received and activated then status now is complete

1. **HOW TO CANCEL A TRANSACTION**

Steps:-

* Login as a broker
* Go to *Transactions* menu then *Pending* link
* Choose a transaction from the list, Click at *Details* link
* Click at *Cancel Process* button
* The transaction will be cancelled, write the reason for cancellation.

1. **HOW TO SIGN OUT OF THE SYSTEM**

Steps:-

* Login to the system (as either broker or investor)
* For brokers, at the Dashboard top right, there is link of options among which is logout
* Click at logout to sign out from the system
* For investor, at the Dashboard, there is a *Logout* menu
* Click at *Logout* menu to sign out from the system (Also each menu has a link of logging out)