



# **DHIR DEBT MANAGEMENT SYSTEM (DDMS)**

# **USER GUIDE**

**FOR**

**COLLECTOR**

## TABLE OF CONTENTS

SECTION	CONTENT	PAGE
	INTRODUCTION	1
	HOW TO USE THIS MANUAL	1
	COLLECTOR/AGENT ACCESS	2
1.0	LOGIN	2
1.1	COLLECTOR/AGENT INTERFACE	3
2.0	NAVIGATION SECTION	4
2.1	DASHBOARD	4
2.1.1	NEXT CALL REMINDER	4
2.1.2	ACTIVITY HISTORY	9
2.1.3	SORTING ACTION	9
2.1.4	FILTERING ACTION	10
2.1.5	CASE ASSIGN (MY CASE)	10
2.1.6	VISIT ASSIGN (MY VISIT)	11
2.2	ADVANCED SEARCH	13
2.2	ADVANCED SEARCH - REARRANGE & HIDE/SHOW COLUMNS	15
2.2.1	ACTION ON FILTERED ACCOUNT	17
2.2.2	TYPE OF ACTION	18
2.3	CHANGE PASSWORD	19
2.4	MONITOR PERFORMANCE	19
2.5	LOGOUT	20
3.0	CUSTOMER ACCOUNT	21
3.1	BORROWER DETAILS	22
3.1.1	BORROWER DETAILS - SET ACTION	24
3.1.2	BORROWER DETAILS - SET NEXT CALL	24
3.1.3	BORROWER DETAILS - UPDATE REMARKS	25
3.1.4	BORROWER DETAILS - SENT SMS	25
3.1.5	BORROWER DETAILS - UPDATE INCOMING CALL	26

3.2	CALL CONNECTED WITH CUSTOMER	27
3.2.1	MAKE PAYMENT WITH SETTLEMENT PLAN	28
3.2.2	MAKE PAYMENT WITHOUT SETTLEMENT PLAN (PTP)	29
3.2.3	CHECKING PAYMENT	29
3.2.4	NOT MAKING ANY PAYMENT	30
3.3	CALL CONNECTED WITH 3RD PERSON	30
3.3.1	DECEASED	31
3.3.2	CUSTOMER NOT AVAILABLE	31
3.3.3	WRONG NUMBER	32
3.4	VISIT OUTCOME	32
3.4.1	NO CONTACT VISIT OUTCOME	33
3.5	CALL FLOW	34
3.6	ADD NEW EMAIL/PHONE/ADDRESS/REQUEST FOR DELETION	36
3.6	ADD NEW PHONE/REQUEST FOR DELETION	37
3.7	ADD NEW ADDRESS/REQUEST FOR DELETION	38
7.0	PRODUCT DETAILS	39
8.0	CALL/VISIT DETAILS	40
9.0	SETTLEMENT/PTP DETAILS	40
10.0	DOCUMENT REPOSITORY	41
11.0	EMPLOYMENT DETAILS	42

## INTRODUCTION

**T**his manual provides you with the steps and instructions how to use the **Dhir Debt Management System (DDMS)**.

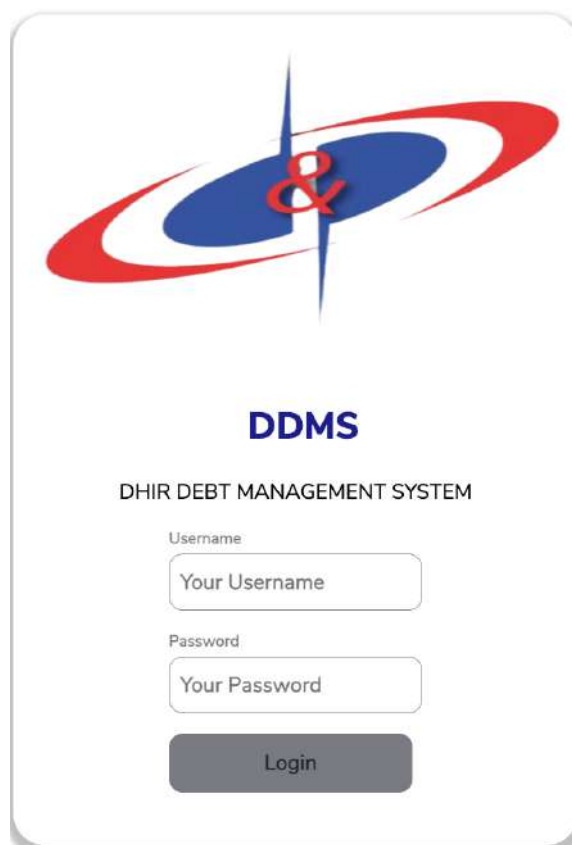
## HOW TO USE THIS MANUAL

**T**his manual serves as a reference guide for the **DDMS** for Collector /Agent access.

## COLLECTOR/AGENT ACCESS

### 1.0 LOGIN

Enter your login and password in the Login screen. Please contact the administrator if you have problem to login.



The login screen features a logo at the top consisting of a blue circle with a red ampersand inside, surrounded by red and blue swooshes. Below the logo, the text "DDMS" is displayed in a large, bold, blue font, followed by "DHIR DEBT MANAGEMENT SYSTEM" in a smaller, black font. The login fields include a "Username" label above a text box containing "Your Username", a "Password" label above a text box containing "Your Password", and a "Login" button at the bottom.

**DDMS**

DHIR DEBT MANAGEMENT SYSTEM

Username

Your Username

Password

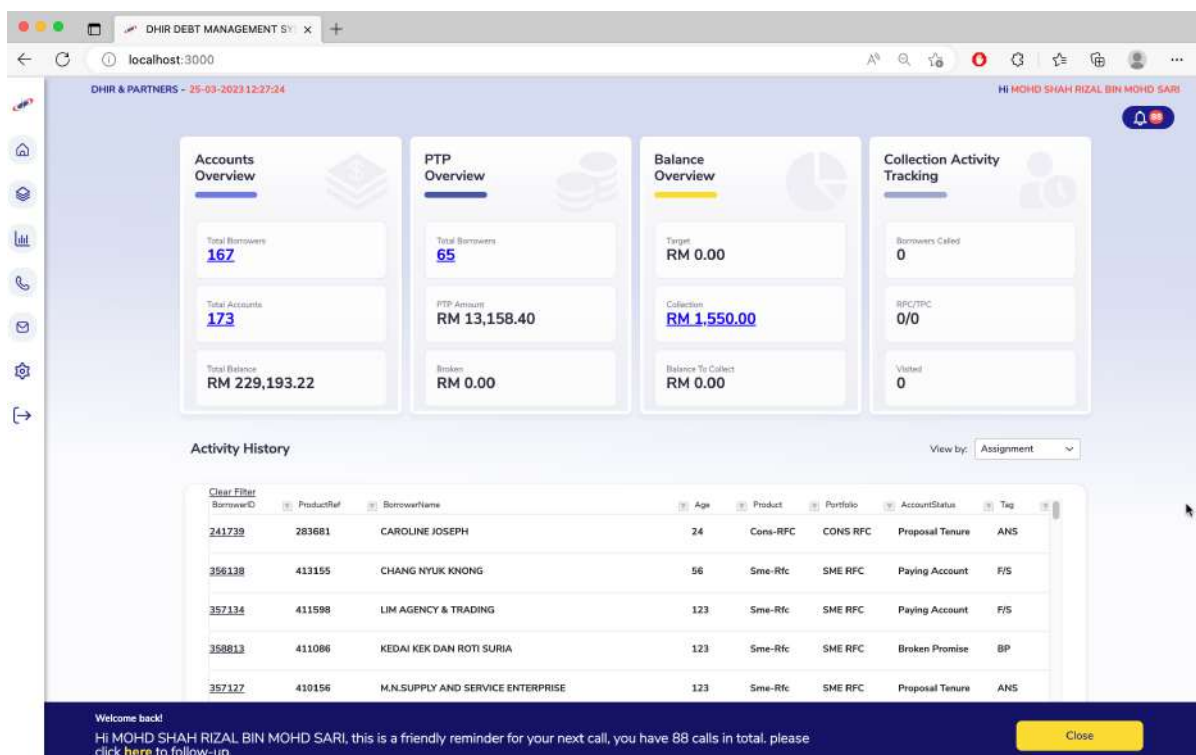
Your Password

Login

## 1.1 COLLECTOR/AGENT INTERFACE

Upon successful of the login process, system will redirect you to the dashboard module which consists of the following sections:

- Navigation section
- Content Area



### Navigation section

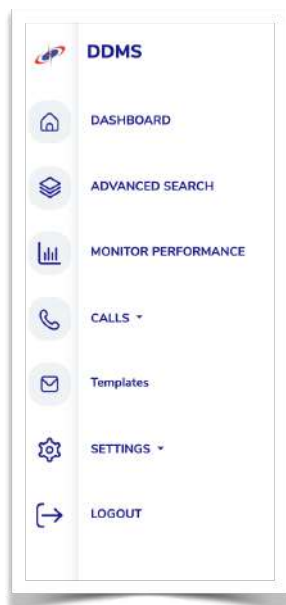
In the left column, the navigation section allowing you to access to the content of the system menu.

### Content Section

In the right column, all the content page that you selected via navigation section will be displayed

## 2.0 NAVIGATION SECTION

In order to access the navigation section, just simply hover your mouse onto the navigation area. The navigation menu will be displayed in accordance to your access level which consists of the following content:



## 2.1 DASHBOARD

From the dashboard summary, you can easily find your reminder/next call list via system reminder as shown below:



Or by clicking on the system notification counter



### 2.1.1 NEXT CALL REMINDER

Under the Next Call Reminder Pop-up, we have grouped your Next Call Reminder into four (4) types.

- **Due Calls** – All your past **Next Call** Reminders which didn't follow-up
- **Today's Calls** – All your current day **Next Call** reminders
- **Future Calls** - All your future **Next Call** reminders
- **Total Calls** – Your total **Next call** Reminders

Next Call Reminder <span>×</span>			
Due Calls <b>83</b>	Today's Calls <b>0</b>	Future Calls <b>3</b>	Total Calls <b>86</b>
Next Call Date	Borrower Name / ID	Client / CreationDate	Remark
27-03-2023 12:00:00 AM	Name: Aliah fadzilah wan bt abdullah ID: <u>4324</u>	Aeon 16-01-2023	PTP Date: dd-mm-yyyy PTP Amount: RM 0.00 Cust cakap nk bayar full settlement hujung bulan 3 and tidak mahu buat apa2 bayaran dlm bulan 1 & 2
27-03-2023 12:00:00 AM	Name: Aliah fadzilah wan bt abdullah ID: <u>4324</u>	Aeon 16-01-2023	PTP Date: dd-mm-yyyy PTP Amount: RM 0.00 Cust cakap nk bayar full settlement hujung bulan 3 and tidak mahu buat apa2 bayaran dlm bulan 1 & 2
02-04-2023 12:00:00 AM	Name: Chan khai xuan ID: <u>14634</u>	Aeon 13-02-2023	PTP Date: dd-mm-yyyy PTP Amount: RM 0.00 Cust baru dpt kerja inform bulan 4 nak bayar full settlement

By clicking on the number under each category under the **Next Call** Reminder Pop-up, you can list down the reminders accordingly as shown above.

From the dashboard, you can easily find your day to day account to follow up and your account productivity. The system will display 4 divisions consist of:

- **ACCOUNTS/FILE HOLDING OVERVIEW**
- **PTP(PROMISE TO PAY) OVERVIEW**
- **TARGET & BALANCE OVERVIEW**
- **PRODUCTIVITY OVERVIEW**

Accounts Overview	PTP Overview	Balance Overview	Collection Activity Tracking
Total Borrowers <b>786</b>	Total Borrowers <b>26</b>	Target <b>RM 0.00</b>	Borrowers Called <b>0</b>
Total Accounts <b>789</b>	PTP Amount <b>RM 6,311.00</b>	Collection <b>RM 0.00</b>	RPC/TPC <b>0/0</b>
Total Balance <b>RM 6,983,746.82</b>	Broken <b>RM 0.00</b>	Balance To Collect <b>RM 0.00</b>	Visited <b>0</b>



## ■ ACCOUNTS OVERVIEW :

This division displays the below items:

1. Total Borrowers: Total number of borrowers assigned to collector.
  2. Accounts: Number of accounts available under the borrowers assigned.
  3. Balance: Total outstanding balance of the borrowers assigned.
- By clicking on the total borrower, the system will display the borrower summary grouping by the clients together with their productivity and KPI.

DASHBOARD CLIENT SUMMARY



#	CLIENT	FILE HOLDINGS			Mar-2023 PTP		TARGET	Mar-2023 COLLECTIONS		Mar-2023 CALLS/VISIT			
		Borrowers	Accounts	Balance	Borrowers	Amount	TargetAmount	Borrowers	Amount	NOB Called	NOB Visited	RPC	TPC
1	AEON	786	789	RM 6,983,746.82	26	RM 6,311.00	RM 0.00	0	RM 0.00	0	0	0	0
Total		786	789	RM 6,983,746.82	26	RM 6,311.00	RM 0.00	0	RM 0.00	0	0	0	0

- By clicking on the total account, the system will display the account summary grouping by their status.

STATUS SUMMARY



Client:  NOB: 786 Balance: 6,983,746.82

#	STATUS	Borrowers	Accounts	Balance
1	Work In Progress <a href="#">↓</a>	592	589	RM 5,368,544.11
2	Under Negotiation <a href="#">↓</a>	74	74	RM 500,372.04
3	Request For Reshuffle <a href="#">↓</a>	63	63	RM 725,714.71
4	Proposal Tenure <a href="#">↓</a>	31	31	RM 219,404.45
5	Broken Promise <a href="#">↓</a>	17	17	RM 140,600.39
6	Promise To Pay <a href="#">↓</a>	7	7	RM 28,749.91
7	Paying Account <a href="#">↓</a>	5	5	RM 361.21

## PROMISE TO PAY (PTP) OVERVIEW:

This division displays the below items:

1. Total Borrowers: Total borrowers promised to pay current month.
  2. PTP Amount: Total promise amount payable.
  3. Broken: Total broken promise amount.
- By clicking on the Total Borrowers, you can get all your PTP account list as shown below:

**PTP LISTING** ⬇ ✕

PTP: 26  
AMOUNT: RM 6,311.00 Clear Filter

BorrowerID	BorrowerName	Promise Date	Promise Amount	Obtained By	Obtained Date	Client	PTP Number
21021	MOHD FAKHRUMIZI BIN MOHD IZANI	2023-03-15	400	MUHAMMAD NUR AFFANDI BIN JAAFFAR	2023-03-03T00:00:00.000Z	AEON	
3043	ABDUL LATIF BIN HASAN	2023-03-11	100	MUHAMMAD NUR AFFANDI BIN JAAFFAR	2023-03-02T00:00:00.000Z	AEON	
2842	LASUMI KARIM	2023-03-10	150	MUHAMMAD NUR AFFANDI BIN JAAFFAR	2023-03-01T00:00:00.000Z	AEON	
19741	AIZAT BIN MOHAMED	2023-03-10	300	MUHAMMAD NUR AFFANDI BIN JAAFFAR	2023-03-03T00:00:00.000Z	AEON	
23516	AFZAL AZIM BIN NOR AZAHAR	2023-03-10	200	MUHAMMAD NUR AFFANDI BIN JAAFFAR	2023-03-02T00:00:00.000Z	AEON	
21150	ANALETCHUMY A/P RAVINDRAN	2023-03-10	200	MUHAMMAD NUR AFFANDI BIN JAAFFAR	2023-03-03T00:00:00.000Z	AEON	
11	MOHAMAD ARIF HAFIZUDDIN	2023-03-10	200	MUHAMMAD NUR AFFANDI BIN JAAFFAR	2023-03-03T00:00:00.000Z	AEON	
12387	KASMA BINTI JENAL	2023-03-10	100	MUHAMMAD NUR AFFANDI BIN JAAFFAR	2023-03-03T00:00:00.000Z	AEON	
17803	AZMAN BIN ROSNAN	2023-03-10	150	MUHAMMAD NUR AFFANDI BIN JAAFFAR	2023-03-03T00:00:00.000Z	AEON	
24244	AMIR ARIF BIN ADNAN	2023-03-07	160	MUHAMMAD NUR AFFANDI BIN JAAFFAR	2023-02-22T00:00:00.000Z	AEON	
8816	DEVI A/P RAJAMANICKAM	2023-03-07	200	MUHAMMAD NUR AFFANDI BIN JAAFFAR	2023-03-01T00:00:00.000Z	AEON	
23253	AHMAD AMEERUL ALBAHAQI BIN JEDIN	2023-03-07	301	MUHAMMAD NUR AFFANDI BIN JAAFFAR	2023-03-03T00:00:00.000Z	AEON	
19934	NURAFRINA BINTI SALLEH	2023-03-06	100	MUHAMMAD NUR AFFANDI BIN JAAFFAR	2023-03-03T00:00:00.000Z	AEON	
68	MUHAMMAD AL-AKH-YAR	2023-03-05	500	MUHAMMAD NUR AFFANDI BIN JAAFFAR	2023-03-03T00:00:00.000Z	AEON	

Close

- You can also apply the filter and sort (ascending/descending) on any columns as you wish. In order for you to sort, you just move your mouse cursor at the end of each column and click to sort.

Promise Amount	Obtaine
100	MUHAN
100	MUHAN
100	MUHAN

## TARGET & COLLECTIONS OVERVIEW:

This division displays the below items:

1. Target: Agent target preset by the Team Leader (TL)/Manager (Mgr)
2. Collection: Total amount collected by the agent month to date (MTD).
3. Balance to collect: Remaining amount to be collected less collection.

## PRODUCTIVITY OVERVIEW:

This division displays the below items:

1. Borrowers Called: Total borrowers have been called by the agent.
  2. RPC/TPC: From total calls, how many right party contact (RPC) obtained by agent and also how many call answered by the 3rd party contact (TPC).
  3. Visited: Total borrowers have been visited by the agent.
- By clicking on the Borrowers Called, you can get all your called listing as shown below:

CALLS LISTING 



CALLS: 4 [Clear Filter](#)

BorrowerId	BorrowerName	Client	Collector	CallDate	Outcome	Disposition	NumberDialed	CallType	Ri
4	ISAN A/L ANGAH	AEON	MUHAMMAD NUR AFFANDI BIN JAAFFAR	2023-03-26	RPC	NEGOTIATION	0194268975	OUT	SI
11	MOHAMAD ARIF HAFIZUDDIN	AEON	MUHAMMAD NUR AFFANDI BIN JAAFFAR	2023-03-26	TPC	NOT_AVAILABLE	073865401	OUT	SI
1064	GNANASELVAM A/P RAMAIAH	AEON	MUHAMMAD NUR AFFANDI BIN JAAFFAR	2023-03-26	RNA	RNA	01110626956	OUT	SI
1064	GNANASELVAM A/P RAMAIAH	AEON	MUHAMMAD NUR AFFANDI BIN JAAFFAR	2023-03-26	RNA	RNA	0389259042	OUT	SI

## 2.1.2 ACTIVITY HISTORY

Under this section, you can have an option to view your **Assignment** (File Holding), **Case** (Account assign for you follow up) and also **Visit** (Account assign for your visit) as shown below:



Activity History

View by: **Assignment**  
☒ Case  
☐ Visit

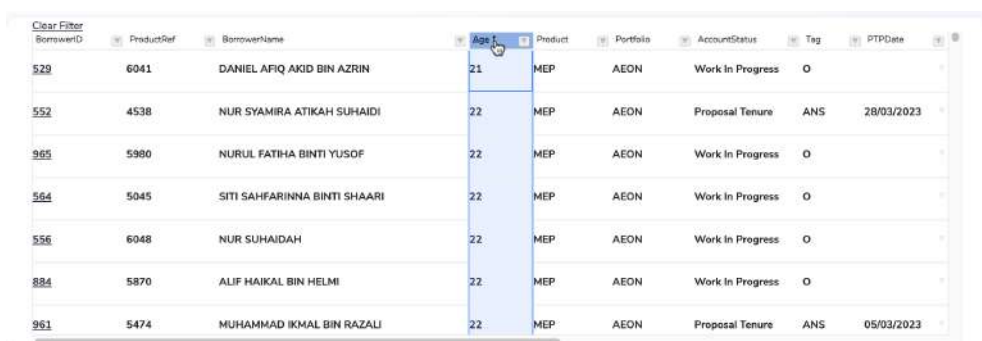
Total Case(s) : 17

Borrower Name / ID	Client / Product	CreationDate↑	Case Date↑	PTPDate↑	PTPAmount↑	LPD↑	LPA↑	Remark
Name: Siti noraini binti mohd razali ID: <a href="#">36</a>	Client: Aeon Product: Ucep	26-03-2023	26-03-2023,12:26 dd-mm-yyyy	RM 0.00	dd-mm-yyyy	RM 0.00		Case asg
Name: Sivanesan a/l segar ID: <a href="#">40</a>	Client: Aeon Product: Mep	26-03-2023	26-03-2023,12:26 dd-mm-yyyy	RM 0.00	dd-mm-yyyy	RM 0.00		Case asg
Name: Rubiatul saidatina noro ID: <a href="#">53</a>	Client: Aeon Product: Mep	26-03-2023	26-03-2023,12:26 dd-mm-yyyy	RM 0.00	dd-mm-yyyy	RM 0.00		Case asg
Name: Muhammad al-akhyar ID: <a href="#">68</a>	Client: Aeon Product: Mep	26-03-2023	26-03-2023,12:26 05-03-2023	RM 500.00	26-10-2022	RM 100.00		Case asg
Name: Che muhammad syahmi ID: <a href="#">133</a>	Client: Aeon Product: Superbike	26-03-2023	26-03-2023,12:26 dd-mm-yyyy	RM 0.00	dd-mm-yyyy	RM 0.00		Case asg
Name: Muhammad fikry bin saifulnizam	Client: Aeon	26-03-2023	26-03-2023,12:26 dd-mm-yyyy	RM 0.00	dd-mm-yyyy	RM 0.00		Case asg

If you click on “**Assignment**” section, the system will highlight that particular tab and display the corresponding listing details. You can open the Borrower Screen by clicking on the hyperlink under ‘**Borrower Id**’ then system will take u to the borrower details screen upon clicking the link.

## 2.1.3 SORTING

You can sort the file assignment based on any column by clicking nearer to the column name that you want to sort. In the above example we want to sort by **Age** & hence we clicked nearer to the column “**Age**” and system sorted the result accordingly.

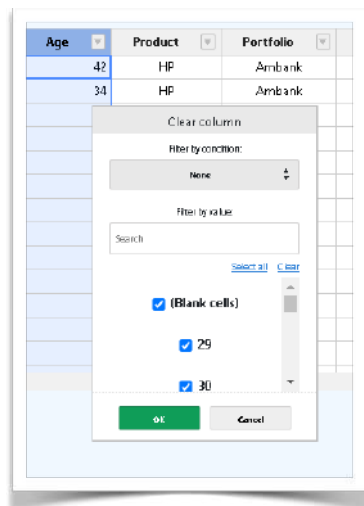


Clear Filter

BorrowerID	ProductRef	BorrowerName	Age	Product	Portfolio	AccountStatus	Tag	PTPDate
<a href="#">529</a>	6041	DANIEL AFIQ AKID BIN AZRIN	21	MEP	AEON	Work In Progress	O	
<a href="#">552</a>	4538	NUR SYAMIRA ATIKAH SUHAIDI	22	MEP	AEON	Proposal Tenure	ANS	28/03/2023
<a href="#">965</a>	5980	NURUL FATHA BINTI YUSOF	22	MEP	AEON	Work In Progress	O	
<a href="#">564</a>	5045	SITI SAHFARINNA BINTI SHAARI	22	MEP	AEON	Work In Progress	O	
<a href="#">556</a>	6048	NUR SUHAIDAH	22	MEP	AEON	Work In Progress	O	
<a href="#">884</a>	5870	ALIF HAIKAL BIN HELMI	22	MEP	AEON	Work In Progress	O	
<a href="#">961</a>	5474	MUHAMMAD IKMAL BIN RAZALI	22	MEP	AEON	Proposal Tenure	ANS	05/03/2023

## 2.1.4 FILTERING (AS IN EXCEL WORK SHEET):

You can filter the file assignment based on any column by clicking **“Arrow” icon** nearer to the column name that you want to filter. In the above example we want to filter by **Age** & hence we clicked the “Arrow” icon nearer to the column **“Age”** and system display the filter options for you to apply the filter.



You can select the range by filtering it by value and click the button **“OK”**, and then system will filter as per the filtered values & display the listing as in Excel.

[Clear Filter](#)

You can always revert / clear your filter results by clicking the **“Clear Filter”** hyperlink as displayed in above screenshot.

## 2.1.5 CASE

My Cases are the day to day tasks created by your Team leader (TL) or Manager (Mgr) to the agent / can be created by collector to themselves. Upon having this type of tasks, you can open the borrower screen by clicking the “BorrowerId” blue colour hyperlink & call the borrowers based on the listing & *once the borrower has been called then system automatically remove that particular borrower details from listing under the “CASE” tab*. If all the borrowers under the “CASE” has been called then system removes all the borrowers from listing under this tab.

As your Team Leader (TL)/Manager (Mgr), they can monitor the collector’s day-to-day tasks whether it is completed (or) not in their “Collector Performance Monitoring” screen. So it is collector’s responsibility to complete all the cases assigned by their TL/Mgr.

Activity History View by: Case

Total Case(s) : 17

Borrower Name / ID	Client / Product	CreationDate↑↓	Case Date↑↓	PTPDate↑↓	PTPAmount↑↓	LPD↑↓	LPA↑↓	Remark
Name: Siti noraini binti mohd razali ID: <a href="#">36</a>	Client: Aeon Product: Ucep	26-03-2023	26-03-2023,12:26	dd-mm-yyyy	RM 0.00		dd-mm-yyyy	RM 0.00 Case asg
Name: Sivanesan a/i segar ID: <a href="#">40</a>	Client: Aeon Product: Mep	26-03-2023	26-03-2023,12:26	dd-mm-yyyy	RM 0.00		dd-mm-yyyy	RM 0.00 Case asg
Name: Rubiatul saidatina noro ID: <a href="#">53</a>	Client: Aeon Product: Mep	26-03-2023	26-03-2023,12:26	dd-mm-yyyy	RM 0.00		dd-mm-yyyy	RM 0.00 Case asg
Name: Muhammad al-akhyar ID: <a href="#">68</a>	Client: Aeon Product: Mep	26-03-2023	26-03-2023,12:26	05-03-2023	RM 500.00		26-10-2022	RM 100.00 Case asg
Name: Che muhammad syahmi ID: <a href="#">133</a>	Client: Aeon Product: Superbike	26-03-2023	26-03-2023,12:26	dd-mm-yyyy	RM 0.00		dd-mm-yyyy	RM 0.00 Case asg
Name: Muhammad fikry bin saifulnizam	Client: Aeon	26-03-2023	26-03-2023,12:26	dd-mm-yyyy	RM 0.00		dd-mm-yyyy	RM 0.00 Case asg

## CASE SORTING:

CreationDate↑↓ Case Date↑↓

26-03-2023 26-03-2023,12:26

26-03-2023 26-03-2023,12:26

26-03-2023 26-03-2023,12:26

26-03-2023 26-03-2023,12:26

You can sort your cases assigned by your supervisor / Manager by clicking the “Up Arrow” icon as show in screenshot. Once clicked then

system will sort the listing based on the sorting column as shown in the side screen shot.

## 2.1.6 VISIT

My Visit is the section division where you can see your entire visit scheduled to the agent by their respective TL/Mgr as shown below:

Activity History View by: Visit

Total Visit(s) : 2

Borrower Name / ID	Client / Product	ScheduledDate↑↓	Visit Date↑↓	PTPDate↑↓	PTPAmount↑↓	LPD↑↓	LPA↑↓	Remark
Name: Mohamad effendi b mohd hassan ID: <a href="#">399442</a>	Client: Aeon Product: Mep	26-03-2023	26-03-2023	dd-mm-yyyy	RM 0.00		dd-mm-yyyy	RM 0.00 Visit scheduled, date of visit: 2023-03-26, schedule visit
Name: Mohamad firdaus bin zainal ID: <a href="#">399437</a>	Client: Aeon Product: Ucep	26-03-2023	26-03-2023	dd-mm-yyyy	RM 0.00		dd-mm-yyyy	RM 0.00 Visit scheduled, date of visit: 2023-03-26, schedule visit

Upon having this Visit listing, you can open the borrower screen by clicking the “BorrowerId” blue colour hyperlink & update the borrower visit outcome based on the address visited & *once the borrower visit outcome updated then system automatically remove that particular borrower details from listing under the “VISIT” tab*. If all the borrowers under the “VISIT” have been updated with their visit outcome then system removes all the borrowers from listing under this tab.

Agent can update the visited outcome by clicking on the “House Icon” as shown below.

**BORROWER INFO** | **PRODUCT INFO** | **COLLECTION LOG** | **SETTLEMENT/PTP INFO**

**EMPLOYMENT** | **DOCUMENTS**

Borrower Name: **MOHAMAD EFFENDI B MOHD HASSAN** | Borrower Type: **Primary Customer** | RPC Count/Last RPC No: **0 / N/A** | [FDCPA] RPC Week/Month: **0 / 0**

NRIC: **9306\*\*\*\*\*5405** | Email: **office:077721811** | Negotiation Balance: **RM 5,829.60** | Other Address: **Select Address v**

Date Of Birth: **dd-mm-yyyy** | Primary Contact No: **office:077721811** | Outstanding Balance: **RM 5,829.60**

Bio Info: **Gender, Race, nationality, yrs old** | Phone Numbers: **office : 077721811 v** | Assignment/Expiry Date: **06-03-2023 / 06-06-2023**

Individual/Company: **INDIVIDUAL** | Primary Address: **Address:KOMP ALFA 5 RAMD KEM BATU 3 KLUANG JOHOR 86000.0**

Agent can select the visited address from the dropdown list and also they can upload the photo of their sighted house or car as a proof.

**Update Visit Details**

Address Visited: **Select Address** (dropdown menu showing: MARKAS PASUKAN RMAD 5 RAMD KEM BATU 3 KLUANG JOHOR 86000.0, KOMP ALFA 5 RAMD KEM BATU 3 KLUANG JOHOR 86000.0)

Date/Time Visited: **dd/mm/yyyy, --:--**

Photo: **Choose Files** | No file chosen

**BORROWER VERIFICATION**

Borrower Name: **MOHAMAD EFFENDI B MOHD HASSAN** ☐

NRIC: **9306\*\*\*\*\*5405** ☐

Primary Contact Address: **Address:KOMP ALFA 5 RAMD KEM BATU 3 KLUANG JOHOR** ☐

Contact With: **Customer** | **3rd Person** | **No Contact**

As your TL/Mgr, they can monitor the collector’s day-to-day visits whether it is completed (or) not in their “Collector Performance Monitoring” screen. So it is collector’s responsibility to complete all the visits assigned by their team leaders.

## 2.2 ADVANCED SEARCH

In this module, you can search any information by key-in the respective search data in the Advanced Search module

**ADVANCED SEARCH**

BORROWER INFO	PRODUCT INFO	COLLECTION LOG	PTP/PSL/PAYMENT LOG
Borrower ID	Borrower Name	Contact Information	TPS Batch
NRIC	Email	Guarantor Exist	State
	Phone No	List Customer Level	City
	DOB	Age	Postcode

Search

With this module, collector can pull out the files by applying the **advanced filters** as show above and can do the next action for the selected files.

1. BorrowerID: This is unique id generated by the system for each borrower
2. ProductRef: This is unique id generated by the system for each borrower account.
3. Borrower Name / NRIC: Search by the borrower name / NRIC
4. TPS Batch: Search the files based on the TPS batch information uploaded on system.
5. Batch Reference: Search the files based on the uploaded batch information as per system.
6. State/City/PostCode: Search by the borrower residential state/city/PostCode
7. Age/DOB: Search by the borrower age and date of birth.
8. Phone no/Email: Search the borrower based on phone number (or) email.
9. CO Year / Product: Search the borrower based on account charge of year / product (HP/Cards).



10. Account no / Account Status: Search by the borrower's account number (or) status of account (new assignment/work in progress/ptp).
11. Card Number: Search by the borrower's card account number.
12. Service Number: Search by the account service number.
13. Promise start end/end date: Search the borrower's ptp accounts based on promise to pay start date & end date.
14. Proposal start end/end date: Search the borrower's proposal accounts based on proposal start date & end date.
15. Last Paid Date/Amount: Search the borrower's paid accounts based on paid date (or) paid amount.
16. HP Plate no: Search the borrower's proposal accounts based on hire purchase plate number.
17. Collector: Search the borrower's accounts based on collector file assignment.
18. Assignment Date (Start & end date): Search the borrower's accounts based on assignment start date and end date.
19. Expired Account (Yes/No): Search the all the expired / not expired accounts.
20. Case Date (Start & end date): Search the borrower's accounts based on case start date & end date (day-to day task).
21. RPC Date (Start & end date): Search the borrower's accounts based on contact established date with the customer.
22. Visit Date (Start & end date): Search the borrower's accounts based on date visited the customer.
23. Outstanding Balance (Start & end date): Search the borrower's accounts based on outstanding balance.
24. Negotiation Balance (Start & end date): Search the borrower's accounts based on negotiation balance.

22. Last Action Date (Start & end date): Search the borrower's accounts based on last action on any account.
23. Last Call Date (Start & end date): Search the borrower's accounts based on last call on any account.
24. Legal Status/SubStatus: Search the borrower's accounts based on account legal status(Judgment/Bankruptcy) and legal SubStatus(POD Filed etc.)
25. Last Call Outcome: Search the borrower's accounts based on outcome of the last call (Right party contact/3<sup>rd</sup> party contact/wrong number/AKPK/negotiation etc).
26. Checking Payment Date (Start & end date): Search the borrower's accounts based on checking payment date entered by collector at time of call with the customer.
27. RPC Time (Start & end date): Search the borrower's accounts based on contact established time with the customer.
28. Contact Information: Search the borrower's account having contact details(With Phone/Without Phone/ With Address/Without Address/With Phone & Address/ Without Phone & Address).
29. LOD Exist (Yes/No): Search the all the accounts having the LOD(letter on demand).

User has an option to re-arrange the column position and also hide and show the columns as per their desired by clicking the "Column Setting" option as shown below:

**Column Settings For Advance Search (Re-Arranging columns, Hide & Show column)**

**ADVANCED SEARCH**

Column Name	Position	Hide	Show
AccountNumber	Position-3	<input type="checkbox"/>	<input type="checkbox"/>
BorrowerName	Hide	<input type="checkbox"/>	<input type="checkbox"/>
Age	Hide	<input type="checkbox"/>	<input type="checkbox"/>
NRIC1	Hide	<input type="checkbox"/>	<input type="checkbox"/>
NRIC2	Hide	<input type="checkbox"/>	<input type="checkbox"/>
Product	Hide	<input type="checkbox"/>	<input type="checkbox"/>
Portfolio	Hide	<input type="checkbox"/>	<input type="checkbox"/>
AccountStatus	Hide	<input type="checkbox"/>	<input type="checkbox"/>
Ttg	Hide	<input type="checkbox"/>	<input type="checkbox"/>
Collector	Hide	<input type="checkbox"/>	<input type="checkbox"/>
PreviousCollector	Hide	<input type="checkbox"/>	<input type="checkbox"/>
OutstandingBalance	Hide	<input type="checkbox"/>	<input type="checkbox"/>
PTTDate	Hide	<input type="checkbox"/>	<input type="checkbox"/>
PTTAmount	Hide	<input type="checkbox"/>	<input type="checkbox"/>
CheckingPaidDate	Hide	<input type="checkbox"/>	<input type="checkbox"/>
CheckingPaidAmount	Hide	<input type="checkbox"/>	<input type="checkbox"/>
LPD	Hide	<input type="checkbox"/>	<input type="checkbox"/>
LPA	Hide	<input type="checkbox"/>	<input type="checkbox"/>
CareDate	Hide	<input type="checkbox"/>	<input type="checkbox"/>
Collector	Hide	<input type="checkbox"/>	<input type="checkbox"/>
Client	Hide	<input type="checkbox"/>	<input type="checkbox"/>
LastDate	Hide	<input type="checkbox"/>	<input type="checkbox"/>
ChargeOffDate	Hide	<input type="checkbox"/>	<input type="checkbox"/>
LastAction	Hide	<input type="checkbox"/>	<input type="checkbox"/>
LastCallDate	Hide	<input type="checkbox"/>	<input type="checkbox"/>
LastCallOutcome	Hide	<input type="checkbox"/>	<input type="checkbox"/>
PendingVisit	Hide	<input type="checkbox"/>	<input type="checkbox"/>
LastVisitDate	Hide	<input type="checkbox"/>	<input type="checkbox"/>
LastEmailSent	Hide	<input type="checkbox"/>	<input type="checkbox"/>
LastWhatsAppSent	Hide	<input type="checkbox"/>	<input type="checkbox"/>
LastEmailSent	Hide	<input type="checkbox"/>	<input type="checkbox"/>
LastPTTDate	Hide	<input type="checkbox"/>	<input type="checkbox"/>
LODExist	Hide	<input type="checkbox"/>	<input type="checkbox"/>
PhoneNumber	Hide	<input type="checkbox"/>	<input type="checkbox"/>
ContactAddress	Hide	<input type="checkbox"/>	<input type="checkbox"/>
EmailAddress	Hide	<input type="checkbox"/>	<input type="checkbox"/>
AssignmentDate	Hide	<input type="checkbox"/>	<input type="checkbox"/>
ExpireDate	Hide	<input type="checkbox"/>	<input type="checkbox"/>
HPDAppoint	Hide	<input type="checkbox"/>	<input type="checkbox"/>
HPD%	Hide	<input type="checkbox"/>	<input type="checkbox"/>
DiscAmount	Hide	<input type="checkbox"/>	<input type="checkbox"/>
DiscEndDate	Hide	<input type="checkbox"/>	<input type="checkbox"/>
Employment	Hide	<input type="checkbox"/>	<input type="checkbox"/>
Occupation	Hide	<input type="checkbox"/>	<input type="checkbox"/>
Guarantor1	Hide	<input type="checkbox"/>	<input type="checkbox"/>
Gr3Age	Hide	<input type="checkbox"/>	<input type="checkbox"/>
Gr3NRIC1	Hide	<input type="checkbox"/>	<input type="checkbox"/>
Gr3NRIC2	Hide	<input type="checkbox"/>	<input type="checkbox"/>
Guarantor2	Hide	<input type="checkbox"/>	<input type="checkbox"/>
Gr2Age	Hide	<input type="checkbox"/>	<input type="checkbox"/>
Gr2NRIC1	Hide	<input type="checkbox"/>	<input type="checkbox"/>
Gr2NRIC2	Hide	<input type="checkbox"/>	<input type="checkbox"/>
LastRemark	Hide	<input type="checkbox"/>	<input type="checkbox"/>

Close Submit

For example, you can select the account status and then click search as below.

**ADVANCED SEARCH**

BORROWER INFO	PRODUCT INFO	COLLECTION LOG	PTP/PSL/PAYMENT LOG
Product Ref	FA Date	Collector	Legal Status
Account No	Nego Balance Start	<b>Broken Promise</b>	Legal SubStatus
Card Number	Nego Balance End	Tag Names	Expired Account
Service Number	HP Plate No	Client	Discount Campaign
	Assignment Batch No	Product	Outstanding Balance Start
	Assignment Start Date	Batch Reference	Outstanding Balance End
	Assignment End Date	CO Year	

**Search**

The system will display the record set according to your search criteria.

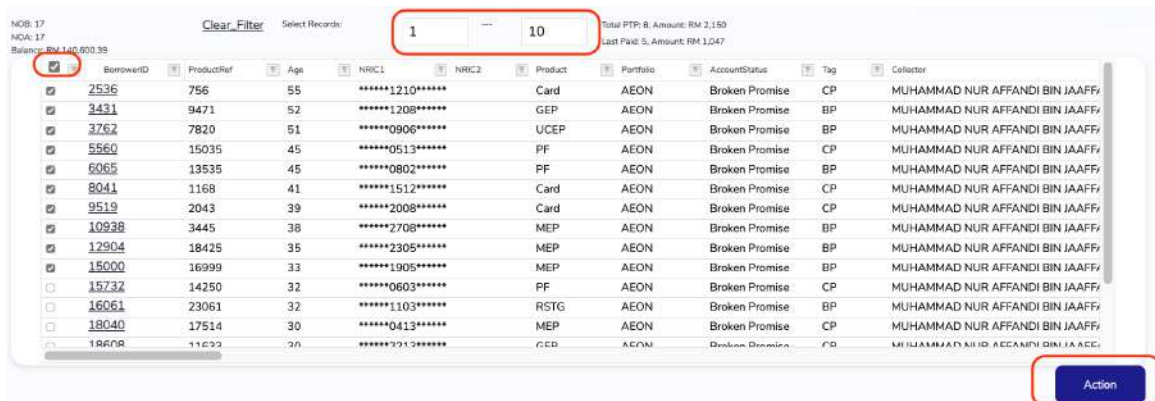
408: 17  
40A: 17  
Balance RM 140,600.39

[Clear Filter](#) Select Records: From To Total PTP: 8, Amount: RM 2,150  
Last Ptd: 5, Amount: RM 1,047

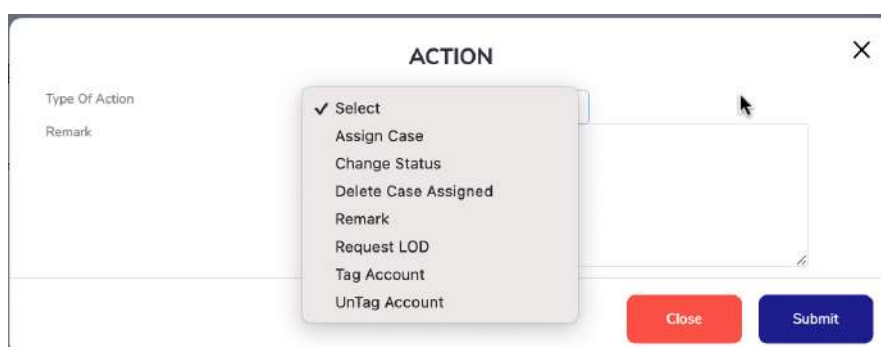
	BorrowerID	ProductRef	Age	NRIC1	NRIC2	Product	Portfolio	AccountStatus	Tag	Collector
<input type="checkbox"/>	2536	756	55	*****1210*****		Card	AEON	Broken Promise	CP	MUHAMMAD NUR AFFANDI BIN JAAFFA
<input type="checkbox"/>	3431									
<input type="checkbox"/>	3762	9471	52	*****1208*****		GEP	AEON	Broken Promise	BP	MUHAMMAD NUR AFFANDI BIN JAAFFA
<input type="checkbox"/>	5560	7820	51	*****0906*****		UCEP	AEON	Broken Promise	BP	MUHAMMAD NUR AFFANDI BIN JAAFFA
<input type="checkbox"/>	6065									
<input type="checkbox"/>	8041	15035	45	*****0513*****		PF	AEON	Broken Promise	CP	MUHAMMAD NUR AFFANDI BIN JAAFFA
<input type="checkbox"/>	9519	13535	45	*****0802*****		PF	AEON	Broken Promise	BP	MUHAMMAD NUR AFFANDI BIN JAAFFA
<input type="checkbox"/>	10938	1168	41	*****1512*****		Card	AEON	Broken Promise	CP	MUHAMMAD NUR AFFANDI BIN JAAFFA
<input type="checkbox"/>	12904									
<input type="checkbox"/>	15000	2043	39	*****2008*****		Card	AEON	Broken Promise	CP	MUHAMMAD NUR AFFANDI BIN JAAFFA
<input type="checkbox"/>	15732	3445	38	*****2708*****		MEP	AEON	Broken Promise	BP	MUHAMMAD NUR AFFANDI BIN JAAFFA
<input type="checkbox"/>	16061	18425	35	*****2305*****		MEP	AEON	Broken Promise	BP	MUHAMMAD NUR AFFANDI BIN JAAFFA
<input type="checkbox"/>	18040	16999	33	*****1905*****		MEP	AEON	Broken Promise	BP	MUHAMMAD NUR AFFANDI BIN JAAFFA
<input type="checkbox"/>	18609									

You can click on the **BorrowerID** link to access the accounts details

## 2.2.1 ACTION ON FILTERED ACCOUNT

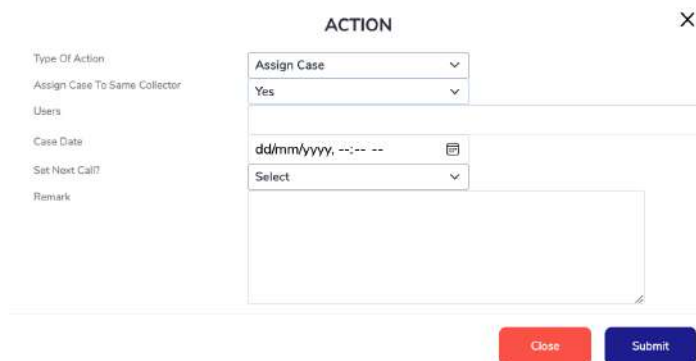


1. After the files filtered, we can select the accounts & do action we want to take place on the selected accounts.
2. We can select the account by clicking the **check box** on the top left corner. This event will select all the accounts.
3. Or we can select the account by entering the selection range in "From" & "To" columns. If you want to select the accounts from 1 to 10 index then key-in 1 in From column & 10 in "To" column.
4. Once Account selected then system will display the **"Action"** button at the bottom of the page. Please click the "Action" button then you will see the "POP-UP" screen where you can do list of action for the selected accounts.



## 2.2.2 TYPE OF ACTIONS

1. Assign Case: Collector can assign new case to themselves for their next actions/call.



The screenshot shows a modal window titled "ACTION" with a close button (X) in the top right corner. On the left side, there is a list of labels: "Type Of Action", "Assign Case To Same Collector", "Users", "Case Date", "Set Next Call?", and "Remark". The corresponding input fields are on the right: a dropdown menu for "Assign Case" (currently showing "Assign Case"), a dropdown menu for "Assign Case To Same Collector" (currently showing "Yes"), a text input field for "Users", a date input field for "Case Date" (showing "dd/mm/yyyy, --:-- --" with a calendar icon), a dropdown menu for "Set Next Call?" (currently showing "Select"), and a large text area for "Remark". At the bottom right of the modal, there are two buttons: a red "Close" button and a blue "Submit" button.

2. Collector must select the "Case Date" & enter the remark.
3. Change Status: Collector can change the status of the account selected.
4. Delete Case Assigned: Collector can delete the case assigned to them.
5. Remark: Collector can upload bulk remark for the selected accounts.
6. Request LOD: Collector can request Letter on Demand for the selected accounts.
7. Tag/Untag Accounts: Collector can change the Tag names/ remove the tags for the selected accounts.

## 2.3 CHANGE PASSWORD

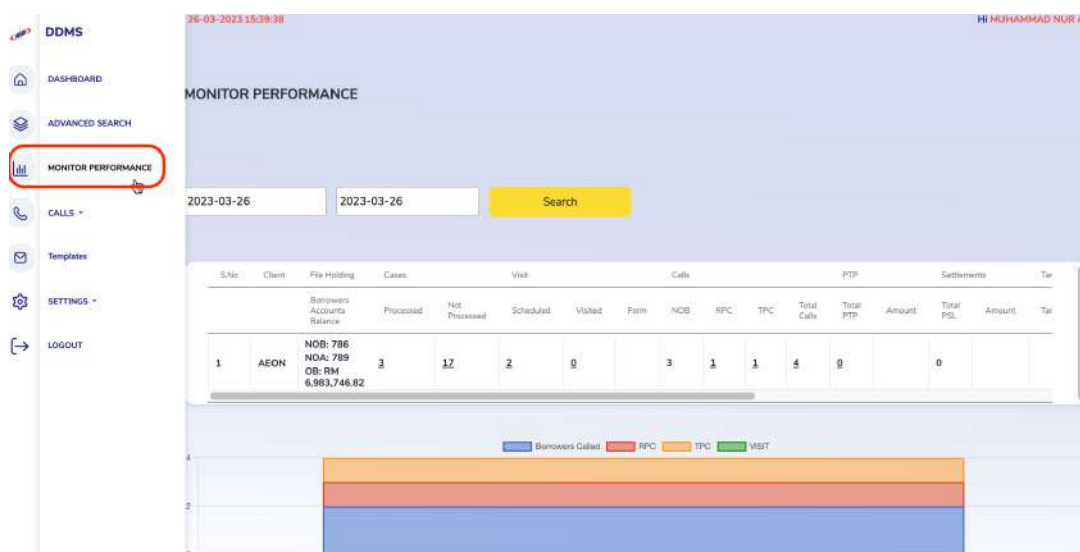
You can change your password by entering the details needed.

**CHANGE PASSWORD**

Full Name	Employee ID
MUHAMMAD NUR AFFANDI BIN JAAFFAR	JHR259
Email	Username
affandijaaffar@gmail.com	affandi
Current Password	
New Password	Confirm Password

Back Submit

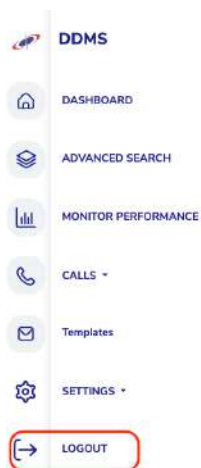
## 2.4 MONITOR PERFORMANCE



1. Collector can analyse their own performance based on the start Date & End date they are selecting.
2. Upon searching the performance, system will list down the collector performance for the clients.

3. From the Performance table chart above, collector can analyse how many files assigned to them & from it how many customers they called/obtain PTP/collections etc.
4. Collector can click on the number hyperlink to preview the borrower accounts.

## 2.5 SIGNOUT



You can click on “LogOut” link to log out from the session.

Note: Please ensure to logout properly by clicking on the Logout link.

### 3.0 CUSTOMER ACCOUNTS

When you click on the borrower ID link, you will be redirected to the customer accounts page. It consist of:

- Borrower Details
- Products Details
- Call / Visit / SMS Details
- Settlement / PTP Details
- Employment Details
- Documents

The screenshot displays a customer account page with the following sections:

- BORROWER INFO:** Includes fields for Borrower Name (NAZATUL AZLINDA ABDUL SHUKOR), NRIC (7311\*\*\*\*5576), Date Of Birth (07-11-1973), Bio Info (Female, Race, nationality, 50 yrs old), and Individual/Company (Individual).
- PRODUCT INFO:** Includes Borrower Type (Primary Customer), Documents, and Phone Numbers (home: 033341219).
- COLLECTION LOG:** Includes RPC Count/Last RPC No (0 / N/A), Negotiation Balance (RM 22,826.21), Outstanding Balance (RM 22,826.21), and Assignment/Expiry Date (06-03-2023 / 06-06-2023).
- SETTLEMENT/PTP INFO:** Includes Other Address (NO 4 JALAN 17/28 SEKSYEN 17 SHAH ALAM SELANGOR 40200) and a Select Address dropdown.

On the top left of the debtor information, there will be two links consist of My Cases and Next Case. You can work on your next case account by simply click on the Next Case hyperlink and update the necessary outcome based on your call or visit outcome.



By clicking on My Cases hyperlink, there will be a pop-up window that consists of your entire cases list and your next calls list.



The dunning/remarks at the bottom part will display the collection activity between the users and the borrower. You have an option to filter the dunning/remarks by simply click on the Dunning/Remarks dropdown for your specific dunning/remarks review.

Date & Time	Collector	Dunning/Remark Type	Status	Phone No	Next Call	Remarks
26-03-2023 12:35:18 PM	Muhammad nur affandi bin jaafar	Right Party Contact	Under negotiation Tag: C/N R	0194268975	60 sec	Client Name: AEON, Borrower Verification done: Name, NRIC, SIP Name: 9, SIP Number: 9, Attempted Number: 0194268975, Call Outcome: NO PAYMENT, Reason for making no payment: NEGOTIATION, Remarks: Negot with cm
09-03-2023 04:26:13 PM	Azhar bin hamzah	Assignment Note	Work in progress Tag: C/N R			Client Name: AEON, Assignment, Tag Name: C/N R, testing
09-03-2023 04:01:02 PM	Azhar bin hamzah	Standard Note	Work in progress Tag: O			Client Name: AEON, testing
25-02-2023 09:07:51 AM	Puteri mayasari binti burhanuddin	Standard Note				Client Name: AEON, SMS Sent : Penyusunan semula bayaran bulanan uK acc: 631913084361, TNPH ISAN AJL, ANGAH Sila beri

### 3.1 BORROWER DETAILS

This is the main screen of the borrower which clearly indicate the Borrower details i.e Name, NROC, DOB, Age, Phone Numbers, Total Outstanding Balance and others.

**BORROWER INFO** | PRODUCT INFO | COLLECTION LOG | SETTLEMENT/PTP INFO

**EMPLOYMENT** | **DOCUMENTS**

Borrower Name: NAZATUL AZLINDA ABDUL SHUKOR | Borrower Type: Primary Customer | RPC Count/Last RPC No: 0 / N/A | [FDCPA] RPC Week/Month: 0 / 0

NRIC: 7311\*\*\*\*\*5576 | Email: | Negotiation Balance: RM 22,826.21 | Other Address: Select Address

Date Of Birth: 07-11-1973 | Primary Contact No: home:0333412197 | Outstanding Balance: RM 22,826.21

Bio Info: Female, Race, nationality, 50 yrs old | Phone Numbers: home : 0333412197 | Assignment/Expiry Date: 06-03-2023 / 06-06-2023

Individual/Company: Individual | Primary Address: NO 4 JALAN 17/2B SEKSYEN 17 SHAH ALAM SELANGOR 40200

In the event if the account is link to multiple participants, you can select from the Borrower ID dropdown to switch to each of them.

When you can click the “Borrower Name” link then system will open the pop-up window with the participant details.

PARTICIPENT DETAILS							
#	Borrower Name / ID	NRIC1 / NRIC2	Date Of Birth	Age	Gender	Race	Type
1	Name: Puteri nurul hayati binti azman ID: 377798	NRIC1: *****0000***** NRIC2:	27-02-2023	0	FeMale		Primary Customer
2	Name: Karmiza binti yaakub ID: 377922	NRIC1: *****0000***** NRIC2:	27-02-2023	0	FeMale		Primary Customer

If the **NRIC is highlighted** in yellow colour means, borrower has more than one account.

BORROWER INFO	PRODUCT INFO	COLLECTION LOG	SETTLEMENT/PTP INFO
EMPLOYMENT	DOCUMENTS		
Borrower Name: <b>NAZATUL AZLINDA ABDUL SHUKOR</b> NRIC: <b>7311*****5576</b> Date Of Birth: <b>07-11-1973</b> Bio Info: <b>Female, Race, nationality, 50 yrs old</b> Individual/Company: <b>Individual</b>	Borrower Type: <b>Primary Customer</b> Primary Contact No: <b>home:0333412197</b> <b>Phone Numbers</b> ✓ home : 033341219 ✓	RPC Count/Last RPC No: <b>0 / N/A</b> Negotiation Balance: <b>RM 22,826.21</b> Outstanding Balance: <b>RM 22,826.21</b> Assignment/Expiry Date: <b>06-03-2023 / 06-06-2023</b> Primary Address: <b>Address: NO 4 JALAN 17/28 SEKSYEN 17 SHAH ALAM SELANGOR 40200</b>	[FDCPA] RPC Week/Month: <b>0 / 0</b> Other Address: <b>Select Address</b>

You can take an action from this screen to call the borrower or update the outcome of the visits. On the other hand, you also can create a next call reminder & update the outcome of the incoming call and review of the account.

In the event, you need to register a new participant or guarantor, you can go a head and click on the “Borrower ID” hyperlink and a new windows will be open for you to update the new information as shown below.

<b>Borrower ID</b> <b>4449</b>	Balance to Collect <b>RM 0.00</b>	<b>Set Action</b>	Last Call <b>DD-MM-YYYY hh:mm</b>
Target <b>RM 0.00</b>	Promise To Pay <b>DD-MM-YYY</b>	Last Payment Date <b>DD-MM-YYYY</b>	Last SMS <b>25-02-2023 09:03:10 AM</b>
Collection <b>RM 0.00</b>	Amount <b>RM 0.00</b>	Payment Amount <b>RM 0.00</b>	Next Call Date <b>DD-MM-YYYY</b>

### REGISTER NEW GUARANTOR/PARTICIPENT X

Borrower NRIC/ID	<input type="text"/>
Borrower Name	<input type="text"/>
Individual/Company	<b>Select</b> ▼
Borrower Type	<b>Select</b> ▼
Date Of Birth	<input type="text"/>
Gender	<b>Select</b> ▼
Race	<b>Select</b> ▼
Account Number	<input type="text"/>
Remark	<input type="text"/>

Close
Submit

### 3.1.1 SET ACTION

The screenshot displays the DDMS Software interface. At the top, there are fields for Borrower ID (4449), Balance to Collect (RM 0.00), Target (RM 0.00), Promise To Pay (DD-MM-YYY), Collection (RM 0.00), and Amount (RM 0.00). A red arrow points to the 'Set Action' dropdown menu, which is highlighted with a red box. The dropdown menu contains the following options: Set Next Call, Incoming Call, Remarks, SMS, and Other Actions. To the right of the dropdown, there are fields for Last Call (DD-MM-YYYY hh:mm), Last SMS (25-02-2023 09:03:10 AM), and Next Call Date (DD-MM-YYYY). At the bottom, there are tabs for BORROWER INFO, PRODUCT INFO, COLL, and SETTLEMENT/PTP INFO.

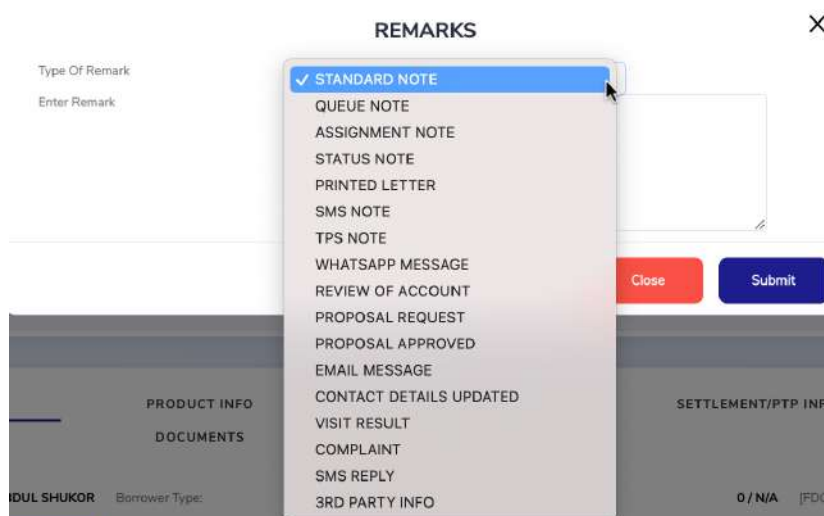
You can click on the “Set Actions” button to take actions such as Set Next Call, Incoming Call, Remarks, Send SMS, Change Status of Account, Delete Case assigned, Delete Scheduled Visit and Tag/Untag Accounts.

### 3.1.2 SET NEXT CALL

1. Press the “Set Next Call” button and system pop-up this window
2. Set the Call Date & Enter the dunning Remark
3. Press the submit button to set the Next Call reminder

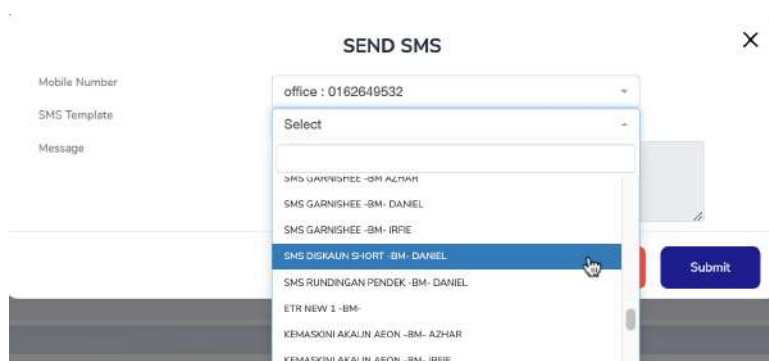
The screenshot shows the 'SET NEXT CALL' pop-up window. It has a title bar with a close button (X). Below the title bar, there are two input fields: 'Call Date' and 'Enter Remark'. The 'Call Date' field is currently empty. Below the 'Enter Remark' field, there is a calendar for March 2023. The calendar shows the days of the week (Su, Mo, Tu, We, Th, Fr, Sa) and the dates (26, 27, 28, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31, 1, 2, 3, 4, 5, 6, 7, 8). The date 26 is highlighted in blue. At the bottom right of the window, there are two buttons: 'Close' (red) and 'Submit' (blue).

### 3.1.3 REMARKS



1. Press the “Remark” button and system pop-up this window
2. Select “Type of Remark” & Enter the dunning Remark
3. Press the submit button to capture the dunning for the account

### 3.1.4 SMS



1. Press the “SMS” button and system pop-up this window.
2. Select “Mobile Number” which you want to send SMS.
3. Select the “SMS Template” using which you want to send SMS.
4. Press the submit button to blast SMS.

## 3.1.5 INCOMING CALL

**EXTENSIONS** [Close]

Call Connect As: Incoming Call

Contact Numbers: Select Incoming Call Number

Other Number: [Text Box]

Type Of Number: Select Type of Number

Relationship: Select Relationship of Number

---

**BORROWER VERIFICATION**

Borrower Name	NAZATUL AZLINDA ABDUL SHUKOR	<input type="checkbox"/>
NRIC	7311*****5576	<input type="checkbox"/>
Date Of Birth	07-11-1973	<input type="checkbox"/>
Primary Contact Address	Address: NO 4 JALAN 17/28 SEKSYEN 17 SHAH ALAM SELANGOR	<input type="checkbox"/>

Contact With:

Customer 3rd Person Wrong Number

1. Press the "Incoming Call" button and system pop-up this window
2. Select the Contact Number from which we received the incoming call
3. If the Number is not in the "Contact Number" list then enter the new number in the "Other Number" text box , Select "Type of Number" & "Relationship" of new number
4. Verify the incoming call information by selecting a minimum of 1 parameters.
5. Select the incoming call outcome either contact with the Customer or 3<sup>rd</sup> Person.

## 3.2 CALL CONNECTED WITH CUSTOMER

**EXTENSIONS** [X]

Call Connect As

Incoming Call

Contact Numbers: home : 0333412197

Other Number

Type Of Number: Select Type of Number

Relationship: Select Relationship of Number

Call Connected To

Customer

Call Outcome: **Select**

- PAYING WITH PROPOSAL
- PROMISE TO PAY (PTP)
- CHECKING PAYMENT
- NOT MAKING ANY PAYMENT

Other Remarks

Back Submit

Select the call outcome and add other remarks if needed.

1. If the customer willing to make settlement then select call outcome as "Make Payment with Settlement Plan"
2. If the customer willing to make small payment (promise to pay) without settlement then select call outcome as "Make Payment without Settlement Plan"
3. If the customer mentioned already make the payment then select call outcome as "Checking Payment"
4. If the customer not willing to make any payment then select call outcome as "Not Making any Payment"

### 3.2.1 MAKE PAYMENT WITH SETTLEMENT PLAN

EXTENSIONS
×
[-]

Call Connect As
Incoming Call

Contact Numbers
Mobile : 01155442248

Other Number
new number

Type Of Number
Mobile

Relationship
Customer

Call Connected To
Customer

Call Outcome
MAKE PAYMENT WITH SETTLEMENT PLAN

Product Reference
× HP : 15611

Outstanding Balance / Settlement Amount
27,937.9
10,000.00

Number of Installment
2

INSTALLMENT PLAN

#	Start Date	Installments	Amount	End Date
1	2022-08-01	1	10,000.00	2022-08-01
2	2022-09-01	1	10,000.00	2022-09-01
Total Installment Plan Amount				20,000
Promise Reminder Date		2022-08-01		
Tag Name		Select		

1. Select the Product Reference for which customer want to do settlement
2. Enter the Settlement Amount & Number of Installment
3. System draw the installment figure based on number of installments
4. entered Enter the installment details
5. Submit the Settlement figure

### 3.2.2 MAKE PAYMENT WITHOUT SETTLEMENT PLAN(PTP)

Call Connected To	Customer
Call Outcome	MAKE PAYMENT WITHOUT SETTLEMENT PLAN
Outstanding Balance	RM 27,937.90
Promise Date	2022-08-11
Promise Amount	500.00
Promise Reminder Date	2022-08-11
Tag Name	Select
Other Remarks	test

Submit Back

- A. Select the Promise date in which customer want to make payment
- B. Enter the Promise Amount & promise reminder date
- C. Enter the Remark and press submit button to capture the PTP

### 3.2.3 CHECKING PAYMENT

Call Connected To	Customer
Call Outcome	CHECKING PAYMENT
Paid Date	07/08/2022
Amount Paid	500
Tag Name	Select
Other Remarks	remark

Submit Back

- A. Select the Paid date in which customer claimed made payment
- B. Enter the Amount paid
- C. Enter the Remark and press submit button to capture the Checking Payment Details



### 3.2.4 NOT MAKING ANY PAYMENT

The screenshot shows a form titled 'NOT MAKING ANY PAYMENT'. The form has the following fields:

- Call Connected To:** Customer
- Call Outcome:** NOT MAKING ANY PAYMENT
- Reason for Not Making Payment:** NEGOTIATION WITH CUSTOMER
- Plan Next Call?:** Yes
- Next Call Date&Time:** 2022-08-18 10:00
- Tag Name:** Select
- Other Remarks:** REMARKS

At the bottom right of the form, there are two buttons: 'Submit' and 'Back'.

- Select "Reason for Not Making Payment". System having the options in the drop down field.
- If you want to call the same customer later then set "Plan Next Call" as "Yes"  
Set the Next Call Date & Time
- Enter the Remark & Press the submit button

### 3.3 CALL CONNECTED WITH 3RD PERSON

If you select 3rd party, system will classify the call is connected to 3rd party. This means that call is answered by 3rd party. Select the call outcome and add other remarks if needed.

The screenshot shows a form titled 'CALL CONNECTED WITH 3RD PERSON'. The form has the following fields:

- Call Connected To:** 3rd Party
- Call Outcome:** Select
- Other Remarks:** Select

The 'Call Outcome' dropdown menu is open, showing the following options:

- Select
- DECEASED
- CUSTOMER NOT AVAILABLE
- WRONG NUMBER

At the bottom right of the form, there are two buttons: 'Submit' and 'Back'.

### 3.3.1 DECEASED

Call Connected To	3rd Party
Call Outcome	DECEASED
RelationShip with Customer	Parent
Date Of Death	09/09/2022
Cause Of Death	cancer
Death Certificate	Choose File No file chosen
Tag Name	Select
Other Remarks	remark

Submit Back

- A. Select the Relationship with the customer who answered the call on behalf of customer.
- B. Select the Date of Death & enter the Cause of Death
- C. Upload the Death Certificate if provided and enter the dunning Remarks & press Submit button

### 3.3.2 CUSTOMER NOT AVAILABLE

Call Outcome	CUSTOMER NOT AVAILABLE
RelationShip with Customer	Parent
Have Alternate Contact Number?	(Optional)
Alternate Contact Number	Select
Plan Next Call?	2022-08-09 05:25
Tag Name	Select
Other Remarks	REMARK

Submit Back

- A. Select the Relationship with the customer who answered the call on behalf of customer.
- B. Enter the Alternate number of Customer if provided by 3<sup>rd</sup> person
- C. If you want to call the same customer later then set "Plan Next Call ?" and enter the next call date
- D. Enter the dunning Remarks & press Submit button

### 3.3.3 WRONG NUMBER

Call Connected To	3rd Party
Call Outcome	WRONG NUMBER
Knows Anyone With your Name?	YES
Tag Name	Select
Other Remarks	REMARKS

- A. Select "Knows anyone with your name?" yes / no
- B. Enter the dunning Remarks & press Submit button

## 3.4 VISIT OUTCOME

BORROWER INFO		PRODUCT INFO		COLLECTION LOG		SETTLEMENT/PTP INFO	
EMPLOYMENT		DOCUMENTS					
Borrower Name:	MOHAMAD EFFENDI B MOHD HASSAN	Borrower Type:	Primary Customer	RPC Count/Last RPC No:	0 / N/A	[FDCPA] RPC Week/Month:	0 / 0
NRIC:	9306*****5405	Email:		Negotiation Balance:	RM 5,829.60	Other Address:	Select Address
Date Of Birth:	dd-mm-yyyy	Primary Contact No:	office:077721811	Outstanding Balance?	RM 5,829.60		
Bio Info:	Gender, Race, nationality, yrs old	Phone Numbers:	office : 077721811	Assignment/Expiry Date:	06-03-2023 / 06-06-2023		
Individual/Company:	INDIVIDUAL			Primary Address:	Address:KOMP ALFA 5 RAMD KEM BATU 3 KLUANG JOHOR 86000.0		

- If the Visit is scheduled by the TL/Mgr then you will see the "Home" icon near to the Address field.
- Please click the "Home" icon to update the Visit Outcome.

EXTENSIONS

#### Update Visit Details

Address Visited	Select Address
Date/Time Visited	dd/mm/yyyy, --:-- --
Photo	Choose Files No file chosen

---

**BORROWER VERIFICATION**

Borrower Name	MOHAMAD EFFENDI B MOHD HASSAN	<input type="checkbox"/>
NRIC	9306*****5405	<input type="checkbox"/>
Primary Contact Address	Address:KOMP ALFA 5 RAMD KEM BATU 3 KLUANG JOHOR	<input type="checkbox"/>

Contact With:

- A. Select the Address Visited from the Address drop down
- B. Select the Date/Time visited
- C. Upload the photo taken during the time of visit
- D. Choose the Visit outcome as Customer/3<sup>rd</sup> Person/No Contact.
- E. Visit Outcome Customer/3<sup>rd</sup> Person is same as Call outcome flow.
- F. If no one available in the address visited then choose “No Contact” as Visit outcome

### 3.4.1 NO CONTACT VISIT OUTCOME

**Update Visit Details**

<b>Address Visited</b>	NO 8 LR <span>UMPUR 5100C</span>
<b>Date/Time Visited</b>	08/08/2022 03:35 PM
<b>Photo</b>	<span>Choose Files</span> <span>No file chosen</span>

**Visit No Contact Details**


<b>Remark</b>	<div></div>
---------------	-------------

Submit

### 3.5 CALL FLOW

Inside the “Borrower Information” contains the contact details such as phone number, email and address. You can also update the details by clicking on the respective links.

BORROWER INFO		PRODUCT INFO		COLLECTION LOG		SETTLEMENT/PTP INFO	
EMPLOYMENT		DOCUMENTS					
Borrower Name:	NAZATUL AZLINDA ABDUL SHUKOR	Borrower Type:	Primary Customer	RPC Count/Last RPC No:	0 / N/A	[FDCPA] RPC Week/Month:	0 / 0
NRIC:	7311*****5576	Email:		Negotiation Balance:	RM 22,826.21	Other Address:	Select Address ▼
Date Of Birth:	07-11-1973	Primary Contact No:	@home:0333412197	Outstanding Balance:	RM 22,826.21		
Bio Info:	Female, Race, nationality, 50 yrs old	Phone Numbers:	home : 0333412197	Assignment/Expiry Date:	06-03-2023 / 06-06-2023		
Individual/Company:	Individual			Primary Address:	Address:NO 4 JALAN 17/28 SEKSYEN 17 SHAH ALAM SELANGOR 40200		

You can click  the icon to call the borrower on the selected number. System will force you to call all the numbers unless you have Right Party Contact (RPC) / 3<sup>rd</sup> Party contact on any of the numbers. This setting can be changes by the System Administrator otherwise (Not to force to call all the numbers)

EXTENSIONS ☐ ✕

Extension

sip:9



Select the extension and click the call icon.

EXTENSIONS ☐ ✕

Number Dialed

0162649532

CONNECT

NOT CONNECT

Each call will have only 2 outcomes either Connect or Not Connect. Therefore, you have to select “CONNECTED” if the call is connected and answered or “NOT CONNECTED” otherwise.

If the call connected, please select with who you have contact with.

EXTENSIONS

×

Number Dailed

0162649532

BORROWER VERIFICATION

Borrower Name

NAZATUL AZLINDA ABDUL SHUKOR

☐

NRIC

7311\*\*\*\*\*5576

☐

Date Of Birth

07-11-1973

☐

Primary Contact Address

Address:NO 4 JALAN 17/28  
SEKSYEN 17  
SHAH ALAM  
SELANGOR

☐

Contact With:

Customer

3rd Person

Wrong Number

Back

If it is with customer then select the outcome and fill the remarks if needed. If it is with 3<sup>rd</sup> party, then select the outcome and add remarks accordingly.

The **Call flow outcome** is same as **Incoming Call Flow outcome** as described in section **3.1.5** to **3.3.3**

## 3.6 ADD NEW EMAIL/PHONE/ADDRESS

### 3.6.1 ADD NEW EMAIL/REQUEST FOR DELETION

The screenshot shows the 'Borrower Info' tab with the following details:

- Borrower Name:** NAZATUL AZLINDA ABDUL SHUKOR
- Borrower Type:** Primary Customer
- RPC Count/Last RPC No:** 0 / N/A
- [FDCPA] RPC Week/Month:** 0 / 0
- NRIC:** 7311\*\*\*\*\*5576
- Date Of Birth:** 07-11-1973
- Bio Info:** Female, Race, nationality, 50 yrs old
- Individual/Company:** Individual
- Primary Contact No:** home:0333412197
- Office:** 016264953
- Negotiation Balance:** RM 22,826.21
- Outstanding Balance:** RM 22,826.21
- Assignment/Expiry Date:** 06-03-2023 / 06-06-2023
- Primary Address:** Address NO 4 JALAN 17/28 SEKSYEN 17 SHAH ALAM SELANGOR 40200

The 'Email' link is highlighted in blue.

- Click the "Email" blue colour link
- System will open the pop-up window to add new email / request for deletion as below.

The pop-up window titled 'VALIDATE / ADD NEW EMAIL' contains a table with the following data:

#	CreationDate	Email Type	Relationship	Email	Remark	Valid?	Primary?	Deletion	Reason For Deletion
1	08-08-2022 05:58:20 PM	Personal	Customer	test@gmail.com	remark	Yes	Yes	Select	

Below the table is the 'ADD NEW EMAIL' section with the following fields:

- Type Of Email: Select Type Of Email
- Email: [Text Field]
- Valid?: Select
- Primary?: Select
- Relationship: Select
- Remark: [Text Field]

Buttons: Close, Submit

- If want to delete the email then select "Deletion" as "Yes" and enter "Reason for Deletion"
- To add new Email, select "Type of Email" as "Home/Work/etc"
- Enter the valid email address
- Select whether it is valid? (Or) not & select Primary? Email (or) not
- Select the Relation of person belong to the new email
- Enter the Remark & press the submit button.

## 3.6.2 ADD NEW PHONE/REQUEST FOR DELETION

BORROWER INFO		PRODUCT INFO		COLLECTION LOG		SETTLEMENT/PTP INFO	
EMPLOYMENT		DOCUMENTS					
Borrower Name:	NAZATUL AZLINDA ABDUL SHUKOR	Borrower Type:	Primary Customer	RPC Count/Last RPC No:	0 / N/A	[FDCPA] RPC Week/Month:	0 / 0
NRIC:	7311*****5576	Email:		Negotiation Balance:	RM 22,826.21	Other Address:	Select Address v
Date Of Birth:	07-11-1973	Primary Contact No:	@home:0333412197	Outstanding Balance:	RM 22,826.21		
Bio Info:	Female, Race, nationality, 50 yrs old	Phone Numbers:	office : 016264953 v	Assignment/Expiry Date:	06-03-2023 / 06-06-2023		
Individual/Company:	Individual			Primary Address:	Address: NO 4 JALAN 17/28 SEKSYEN 17 SHAH ALAM SELANGOR 40200		

- Click the "Phone Numbers" blue color link
- System will open the pop-up window to add new phone / request for deletion as below.

VALIDATE / ADD NEW NUMBER

CreationDate	Phone Type	Relationship	Phone Number	Remark	Valid?	Primary?	Deletion	Reason For Deletion
05-04-2022 01:48:05 PM	TPSPhone05	Select v	0130183	text note	Yes v	No v	Select v	
25-11-2021 12:13:00 PM	TPSPhone01	Select v	0055144	text tpi note	Yes v	No v	Select v	
25-11-2021 12:13:00 PM	TPSPhone01	Select v	0130183	text tpi note	Yes v	No v	Select v	
25-11-2021 12:13:00 PM	TPSPhone01	Select v	00216	text tpi note	Yes v	No v	Select v	
25-11-2021 12:13:00 PM	TPSPhone01	Select v	015012000	text tpi note	Yes v	No v	Select v	

ADD NEW CONTACT

Type Of Number

Select Type Of Number v

New Number

Valid?

Select v

Primary?

Select v

Relationship

Select v

Remark

Close

Submit

- If want to delete the phone then select "Deletion" as "Yes" and enter "Reason for Deletion"
- To add new Phone, select "Type of Number" as "Home/Work/etc"
- Enter the valid new Number
- Select whether it is valid? (Or) not & select Primary? Phone (or) not
- Select the Relation of person belong to the new phone
- Enter the Remark & press the submit button.



### 3.6.3 ADD NEW ADDRESS/REQUEST FOR DELETION

BORROWER INFO		PRODUCT INFO		COLLECTION LOG		SETTLEMENT/PTP INFO	
EMPLOYMENT		DOCUMENTS					
Borrower Name:	NAZATUL AZLINDA ABDUL SHUKOR	Borrower Type:	Primary Customer	RPC Count/Last RPC No:	0 / N/A	[FDCPA] RPC Week/Month:	0 / 0
NRIC:	7311*****5576	Email:		Negotiation Balance:	RM 22,826.21	<a href="#">Other Address</a>	Select Address ▾
Date Of Birth:	07-11-1973	Primary Contact No:	home:0333412197	Outstanding Balance:	RM 22,826.21		
Bio Info:	Female, Race, nationality, 50 yrs old	Phone Numbers	office : 016264953 ▾	Assignment/Expiry Date	06-03-2023 / 06-06-2023		
Individual/Company:	Individual			Primary Address:	Address: NO 4 JALAN 17/28 SEKSYEN 17 SHAH ALAM SELANGOR 40200		

- Click the "Other Address" blue color link
- System will open the pop-up window to add new Address / request for deletion as below.

VALIDATE / ADD NEW ADDRESS

CreationDate	Address Type	Relationship	Address	Remark	Valid?	Primary?	Deletion	Reason For Del
25-11-2021 02:46:19 PM	TPSAddressB3	Select ▾	NO 6 LRG SENTUL	test5	Yes ▾	No ▾	Select ▾	
25-11-2021 10:15:41 PM	TPSAddressB2	Select ▾	NO 6 LRG SENTUL	test 2	Yes ▾	No ▾	Select ▾	
25-11-2021 12:13:00 PM	TPSAddressB1	Select ▾	NO 6 LRG SENTUL	test tp name	Yes ▾	No ▾	Select ▾	

ADD NEW ADDRESS

Type Of Address	Select Type Of Address ▾
Address1	Address1
Address2	Address2
Address3	Address3
Postcode/City	Postcode City
State/Country	State Country
Valid?	Select ▾
Primary?	Select ▾
Relationship	Select ▾
Remark	

- If want to delete the address then select "Deletion" as "Yes" and enter "Reason for Deletion"
- To add new Address, select "Type of Address" as "Home/Work/etc"
- Enter the valid Address1/Address2/Address3
- Select whether it is valid? (Or) not & select Primary? Address (or) not
- Select the Relation of person belong to the new address
- Enter the Remark & press the submit button.

## 4.0 PRODUCT DETAILS

You can view the product details on this section.

BORROWER INFO		PRODUCT INFO		COLLECTION LOG		SETTLEMENT/PTP INFO	
EMPLOYMENT		DOCUMENTS					
Product Ref:	2474						
Borrower Type:	Primary Customer	Fa Date:		Last Paid Date / Amount:	dd-mm-yyyy / RM 0.00	Assignment/Expiry Date:	03-03-2023 / 08-03-2023
<b>Product</b>	MEP (AEON/09-DEC-2022/EP/2865/12/2022)	Loan Date:	dd-mm-yyyy	Checking Paid Date / Amount:	dd-mm-yyyy / RM 0.00	Account Status / Tag Name:	Work In Progress / O
Client:	AEON	ChangeOf Date:	dd-mm-yyyy	Outstanding Balance?	RM 4,059.50	Total Paid (Product):	RM 0.00
Account Number:	6319*****7961	Loan Amount:	RM 0.00	Negotiation Balance:	RM 4,059.50	Total Paid (Borrower):	RM 0.00
Card Number:	502001185440	Interest Rate:	0 %	Total Outstanding Balance?	RM 22,826.21	Legal Procedure / Status:	N/A
Service Number:		Loan Amount:	RM 0.00			Collector:	MUHAMMAD NUR AFFANDI BIN JAAFFAR

You can view more information/activity of the Product, Account Status, Total Paid, Legal Procedure/Status and Collector by clicking on the hyperlink. The details break up as below:

- **Product**, will show the details of the product info.
- **Account Status**, will display the listing status for the account.
- **Total paid (Product)**, will display the listing of the historical payments (if any).
- **Legal Procedure / Status**, will display the details of the legal procedure.
- **Collector**, will display the listing of agent assignments.

## 5.0 CALL / VISIT / SMS DETAILS

You can view the call or visit details for this borrower on this section. You can also view the SMS details/lists by clicking on the Last SMS Date hyperlink.

BORROWER INFO		PRODUCT INFO		COLLECTION LOG		SETTLEMENT/PTP INFO	
EMPLOYMENT		DOCUMENTS					
Last Action Date:	17-03-2023 04:03:27 PM	Last Called Number:	N/A	Last TPC Date / Outcome:	dd-mm-yyyy / N/A	Last Visit Date / Outcome:	dd-mm-yyyy / N/A
Last Case Date:	dd-mm-yyyy	Last RPC Date / Outcome:	dd-mm-yyyy / N/A	Last TPC Contact:	N/A	Last Visit Staff:	N/A
Last Call Date / Outcome:	dd-mm-yyyy / N/A	Last RPC Call Collector:	N/A	Last TPC Call Collector:	N/A	Last Visit Session:	N/A
Last Call By:	N/A	Last RPC Call Duration:	HH:MM:SS	Last TPC Call Duration:	HH:MM:SS	Last RPC Visit Date:	dd-mm-yyyy
Last Call Duration:	HH:MM:SS	Last RPC Called Number:	N/A	Last TPC Called Number:	N/A	<a href="#">Last SMS Date</a>	25-02-2023 09:03:10 AM

## 6.0 SETTLEMENT / PTP DETAILS

You can view the account settlement or PTP details on this section. You can click the hyperlink to view more further details.

BORROWER INFO		PRODUCT INFO		COLLECTION LOG		SETTLEMENT/PTP INFO	
EMPLOYMENT		DOCUMENTS					
Settlement Obtained Date:	dd-mm-yyyy	Settlement Date:	dd-mm-yyyy to dd-mm-yyyy	PTP Obtained Date:	dd-mm-yyyy	PTP Date:	dd-mm-yyyy
Settlement Obtained By:	N/A	Installments:	0	PTP Obtained Collector:	N/A	PTP Amount:	RM 0.00
Settlement Obtained Number:	N/A	Settlement Amount / Discount %:	RM 0.00 / %	PTP Obtained Number:	N/A	<a href="#">No of PTP</a>	0
Settlement Call Duration:	HH:MM:SS	<a href="#">No of Settlement</a>	0	PTP Call Duration:	HH:MM:SS		

- A. [#Installment](#), will display the proposal settlement details.
- B. [No of Settlement](#), will display the payments installment summary.
- C. [No of PTP](#), will display the listing of the PTP

## 7.0 DOCUMENTS

You can upload the related document by clicking the Upload Document button.

The screenshot shows the DDMS Software interface with the DOCUMENTS section selected. The top navigation bar includes BORROWER INFO, PRODUCT INFO, COLLECTION LOG, and SETTLEMENT/PTP INFO. The DOCUMENTS section is active, showing a table with columns: S.No, Uploaded Date, Document Type, Uploaded By, File Name, and Content. Below the table is a yellow 'Upload Document' button.

Then, you will select the type of document at the dropdown. Click Choose Files to upload the related document. You also can add remark down below. After that, click submit to upload the document.

The screenshot shows the 'UPLOAD DOCUMENT' modal form. The form has fields for 'Type Of Document', 'Document', and 'Remark'. A dropdown menu is open for 'Type Of Document', showing options: Select, Bank-in Slip, Bankruptcy Notice, Bankruptcy Search, Death Certificate, JPN Search, LOD Copy, Medical Report, Other, POD Copy, Police Report, and Statement of Account. The 'Document' field has a 'Choose Files' button. The 'Remark' field is a text area. At the bottom are 'Close' and 'Submit' buttons.

## 8.0 EMPLOYMENT DETAILS

In this section, you can update the employment details of the customer by completing the details needed.

BORROWER INFO	PRODUCT INFO	COLLECTION LOG	SETTLEMENT/PTP INFO
<b>EMPLOYMENT</b>	<b>DOCUMENTS</b>		
Employed?	<div>Select</div>		
Employment Type	<div>KERAJAAN</div>		
Occupation Type	<div>KERAJAAN</div>		
Last Employment Date	<div></div>		
Last Salary	<div></div>		
	<div>Submit</div>		