



Induction Training

Collection

Prepared by-Training Team

.... 20
25

Preparations for Center Meeting

- All Field Executives should collect their Collection Demand Sheet(CDS) from branch for below mentioned Clients –
 1. Regular Collection
 2. OD and PAR Collection
- This demand is shared by MIS Team between 1 to 3 of Every month before collection cycle start.
- Once FE will get CDS from branch they will have clear idea about collection they have to do in entire month.
- Calling to be done 1 day before to the collection customer and ensure to inform about advance collection in case of Holiday or Festival.
- For Advance collection clients to be informed before 5 of month so that they get sufficient time to arrange their EMI.

Customer Pledge for Center Meeting

We have all gathered here to help ourselves and our fellow sisters and for the development of the village.

1. We will be present in every center meeting.
2. We will repay the loan taken in our center on time.
3. We will help the sisters of our center at the times of any trouble.
4. We all members will abide by all the rules made for the Center.
5. We shall not deal with any other type of bribe with other members of the Center, with the staff of the Company, or with any other outsider. But if any such incident comes to our notice, we will immediately inform the appropriate authority.
6. We will use the loan received at the center to improve the financial condition of our family.



Employee Pledge for Center Meeting

I promise on the behalf of my company, to follow all the rules of my company and serve all the members well at the right time.



Center Meeting Process

- Greet members
- Make them sit in order
- Members Pledge
- Staff Pledge
- Take signature of the present members and write down reason for absenteeism in attendance register.
- Take instalments as per the sequence
- Write the details of the instalment amount received in the register
- Submit collection by digital receipt process in Mobilight
- Obtaining information by visiting the home of the absent member for two consecutive months
- Submit collection to BOM by filling cash hand over slip
- Then BOM will do final collection posting in system



Center Meeting Process-Attendance Register

15-11-2019

16-11-19 SMR-11-D 69:00

1) અગામી	અગામી
2) અગામી	અગામી
3) અગામી - અગામી	અગામી
4) અગામી	અગામી
5) અગામી - A	Job going
6) અગામી	A
7) અગામી - A	N.R.
8) અગામી - Present	
9) અગામી - out of village	
10) અગામી - A	
11) અગામી - A	
12) અગામી - Present	
13) અગામી - A	
14) અગામી	અગામી વાંદ
15) અગામી	અગામી

9/15

1906

16-11-2019

Things to Remember for Center Meeting

- Arrive at the center 10 minutes before the scheduled meeting time
- Take complete information about the presence of all the members of the center and mark it in the register
- With the Center Leader, all others are asked to follow the rules of the Center as promised in the pledge.
- Call the absentee woman at the center and collect the installments and explain its benefits.
- Keep reminding them about their group/joint responsibility.
- Enter the contact details of all the members of the center in the center register and keep updating them time to time.
- Do not allow the presence of any outsider at the center
- Keep accurate information about loan products and other schemes of the company so that it can motivate its center members in the right direction
- Complete information about the installment money received from the center should be given to each member by giving a receipt.

Center Meeting Process-Cash Management



- Systematically collect the money collected from the center and keep it in the bag along with the receipt and inform the center members by writing all its information at the center such as denomination of total amount etc. on the register and receipt.
- Do not stop or talk to unknown person anywhere (at tea stall or any other secluded place) regarding the money collected from the center.
- Submit the collected amount along with the receipt copy and proper written details to the BOM at the branch in time so that the collection of the day can be deposited in the bank
- Update the installments collected from centers in system with the help of BOM.
- Do not hold cash collection at branch and must deposit daily collection in the bank.
- Reconcile your daily collection with system report at the end of the day.

CDS (Center Demand Sheet)

Eligible For Renewal

BranchName	CenterName	Staffname	Loan ID	ClientID's	ClientName	DueDate	OriginalDue	Contact No. 01	Contact No. 02	Eligible For Renewal	Oct'23 EMI Number	Remarks
Waghodia	GANPATPURA JOGNI MATA FALIYU	LMF08430, Parmar Anil	1849483	1553693	Premilaben Vasava	16-Nov-23	2650	7574898646	0	No	18	
Waghodia	GANPATPURA JOGNI MATA FALIYU	LMF08430, Parmar Anil	1851313	1683281	Solanki Mittalben Ajaybhai	16-Nov-23	3150	7600675018	0	Yes	18	
Waghodia	GANPATPURA JOGNI MATA FALIYU	LMF08430, Parmar Anil	1912114	1756299	HIRALBEN PAGI	16-Nov-23	3300	9875049547	0	No	14	
Waghodia	GANPATPURA JOGNI MATA FALIYU	LMF08430, Parmar Anil	2052867	2028372	CHAVDA VIDHYABEN	16-Nov-23	3300	9764942484	0	Yes	14	
Waghodia	GANPATPURA JOGNI MATA FALIYU	LMF08430, Parmar Anil	2108674	2125059	Thakor Sonalben Shanbhubhai	16-Nov-23	2750	9601671172	0	No	13	
Waghodia	GANPATPURA JOGNI MATA FALIYU	LMF08430, Parmar Anil	2108682	2125167	Parvatiben Thakor	16-Nov-23	3300	8511525934	0	Yes	13	
Waghodia	GANPATPURA JOGNI MATA FALIYU	LMF08430, Parmar Anil	2108683	2120926	Urmilaben Raulaji	16-Nov-23	2750	8156069410	0	Yes	13	
Waghodia	GANPATPURA JOGNI MATA FALIYU	LMF08430, Parmar Anil	2264998	2125030	Nehaben Thakor	16-Nov-23	3300	7861830952	0	No	10	
Waghodia	GANPATPURA JOGNI MATA FALIYU	LMF08430, Parmar Anil	2283255	2220631	Minakshiben Vasava	16-Nov-23	2200	7863892967	0	No	10	
Waghodia	GANPATPURA JOGNI MATA FALIYU	LMF08430, Parmar Anil	2283256	2377431	Hansaben Thakor	16-Nov-23	3300	9313957617	0	No	10	
Waghodia	GANPATPURA JOGNI MATA FALIYU	LMF08430, Parmar Anil	2763652	1801451	Minaben Vasava	16-Nov-23	3950	7874400511	0	No	5	
Waghodia	GANPATPURA JOGNI MATA FALIYU	LMF08430, Parmar Anil	2763805	2074279	Urmilaben Thkor	16-Nov-23	3950	9712250924	0	No	5	

Collection Demand Dates State wise

**Demand Date-
3 to 20 of every Month**



**Applicable in :
Gujarat
Rajasthan
Madhya Pradesh
Himachal Pradesh
Haryana**

**Demand Date-
3 to 11 of every Month**



**Applicable in :
Uttar Pradesh
Uttarakhand
Odisha
Jharkhand**

CDS (Center Demand Sheet) and checking details in Mobilight

Center list

Search Center name

Select Center name

gan

GANPATPURA JOGNI MATA FALIYU
Next Meeting Date :16/11/2023

GANPATPURA V
Next Meeting Date :16/11/2023

GANPATPURA DUMAD
Next Meeting Date :17/11/2023

gan | gand | ganga

1 2 3 4 5 6 7 8 9 0

q w e r t y u i o p

a s d f g h j k l

z x c v b n m

?123 , Hinglish .

Client list

Center Client's list

Client's Details

PTP Remarks

Digital Collection

Cash Collection

BORROWER LIST

Center: KARODIYA GAM SR
Borrower List

Select All

Borrower's Client ID 2780248
Loan ID : 3601460
Borrower Name : VAHONIYA POOJA BEN
Spouse Name : RAHUL BHAI VAHONIYA
Borrower Mobile : 8200116952
Amount Due: 0
Due Date : 16/8/2024

PROMISE TO PAY

Borrower's Client ID 2780174
Loan ID : 2549354
Borrower Name : Mali Sangitaben
Spouse Name : Mari Sanjaybhai
Borrower Mobile : 6356212436
Amount Due: 3300
Due Date : 16/7/2024

PROMISE TO PAY

Please select ONLY ONE client to proceed with Digital Collection.

CASH COLLECTION DIGITAL COLLECTION

CDS (Center Demand Sheet) and checking details in Mobilight

11:32

< Amount Details

Borrower's Client ID: #2780174
 Borrower Name : Mali Sangitaben
 Spouse Name : Mari Sanjaybhai
 Borrower Mobile : 6356212436
 Loan ID : 2549354

Amount Due: ₹3300.0

Amount Collected : 3300

Alternate Mobile No :

CASH COLLECTION

Amount Details

Cash Denomination

Amount Collected

Alternate Mobile Number for Receipt

Cash Denomination and Total Amount

Confirm Collection

Cash Collection

19:35


< Cash Denomination

Available Amount: ₹ 3300

Currency	Qty	Amount:
₹2000 X	___	0
₹500 X	___	0
₹200 X	___	0
₹100 X	___	0
₹50 X	___	0
₹20 X	___	0
₹10 X	___	0
₹5 X	___	0
₹2 X	___	0
₹1 X	___	0
Total		0

CONFIRM COLLECTION

CDS (Center Demand Sheet) and checking details in Mobilight

9:44 AM | 2.0KB/s | 

< Amount Details

Amount Details

Borrower's Client ID:	Amount Due: ₹3950.0
#1560751	
Borrower Name :	Solanki Kaminiben
Spouse Name :	Solanki Dhavalkumar
Borrower Mobile :	8401570626
Loan ID :	3157721

Amount Collected :

Amount Collected

Alternate Mobile No :

Alternate Number

☐ Send Payment link on Alternate Mobile No.

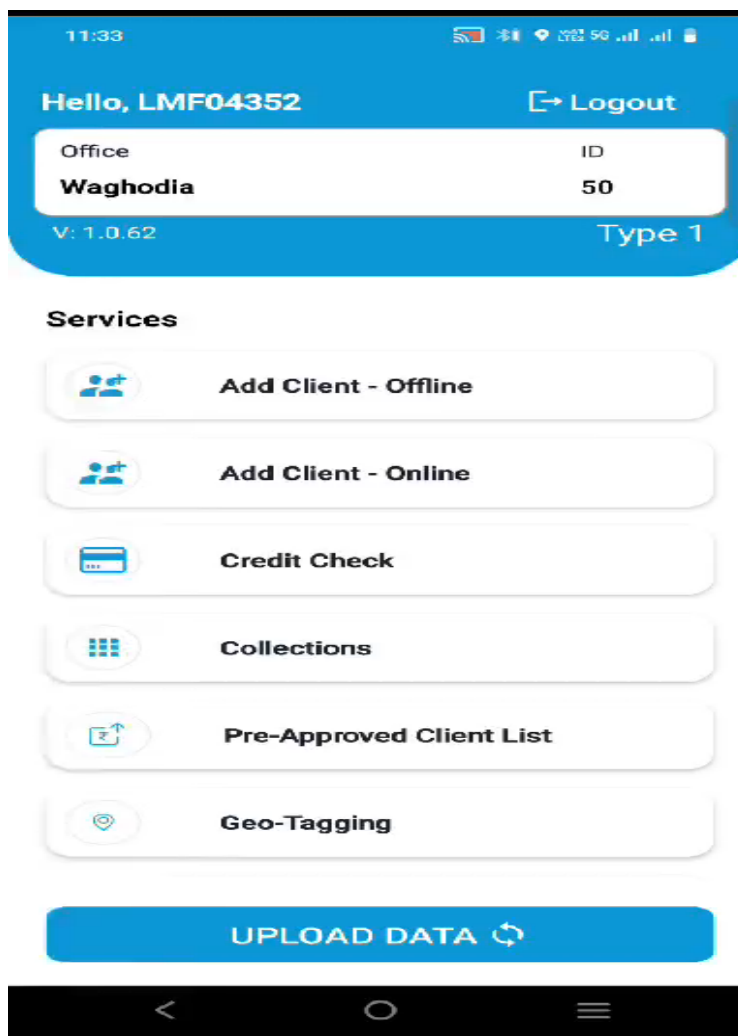
Pay BY Link

Payment link successfully sent to the customer registered mobile number.

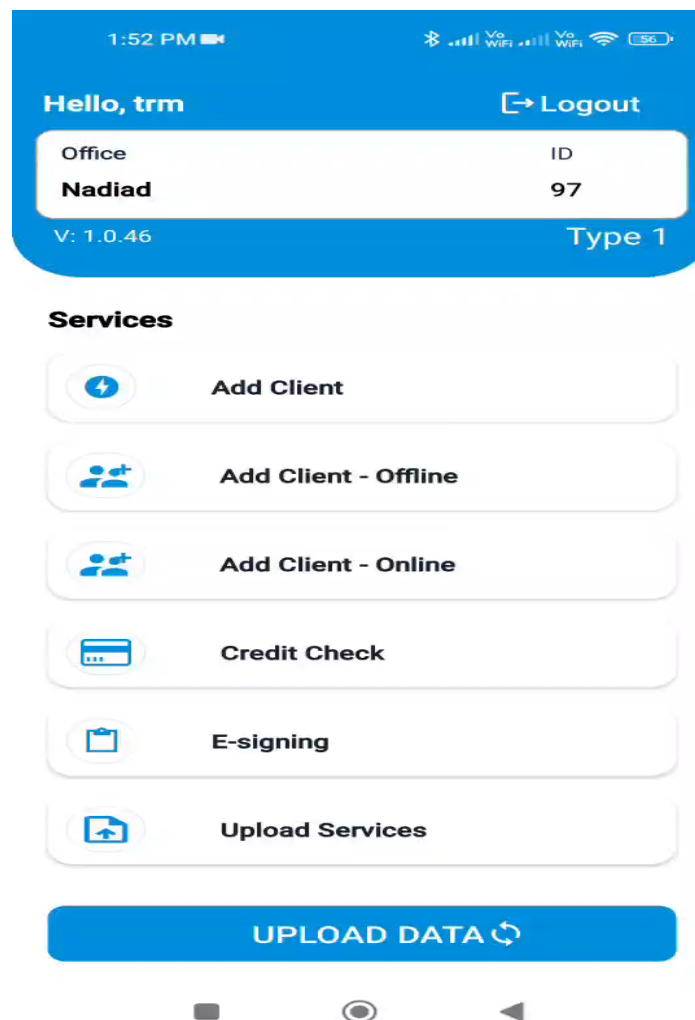
QR Payment & QR Code Scanner

PAY BY LINK **QR PAYMENT**

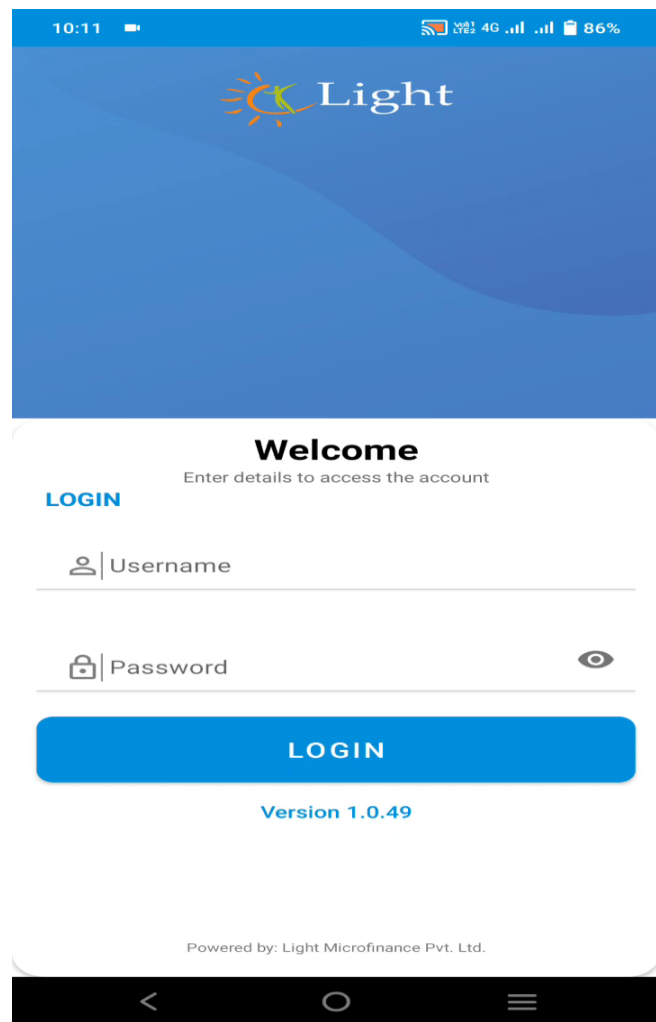
Collection Process-Digital Receipt




Collection Process-Mobilight QR Code



Collection Process-Mobilight Pay by link(FE)






10:11 4G 86%

 Light

Welcome
Enter details to access the account

LOGIN

 Username

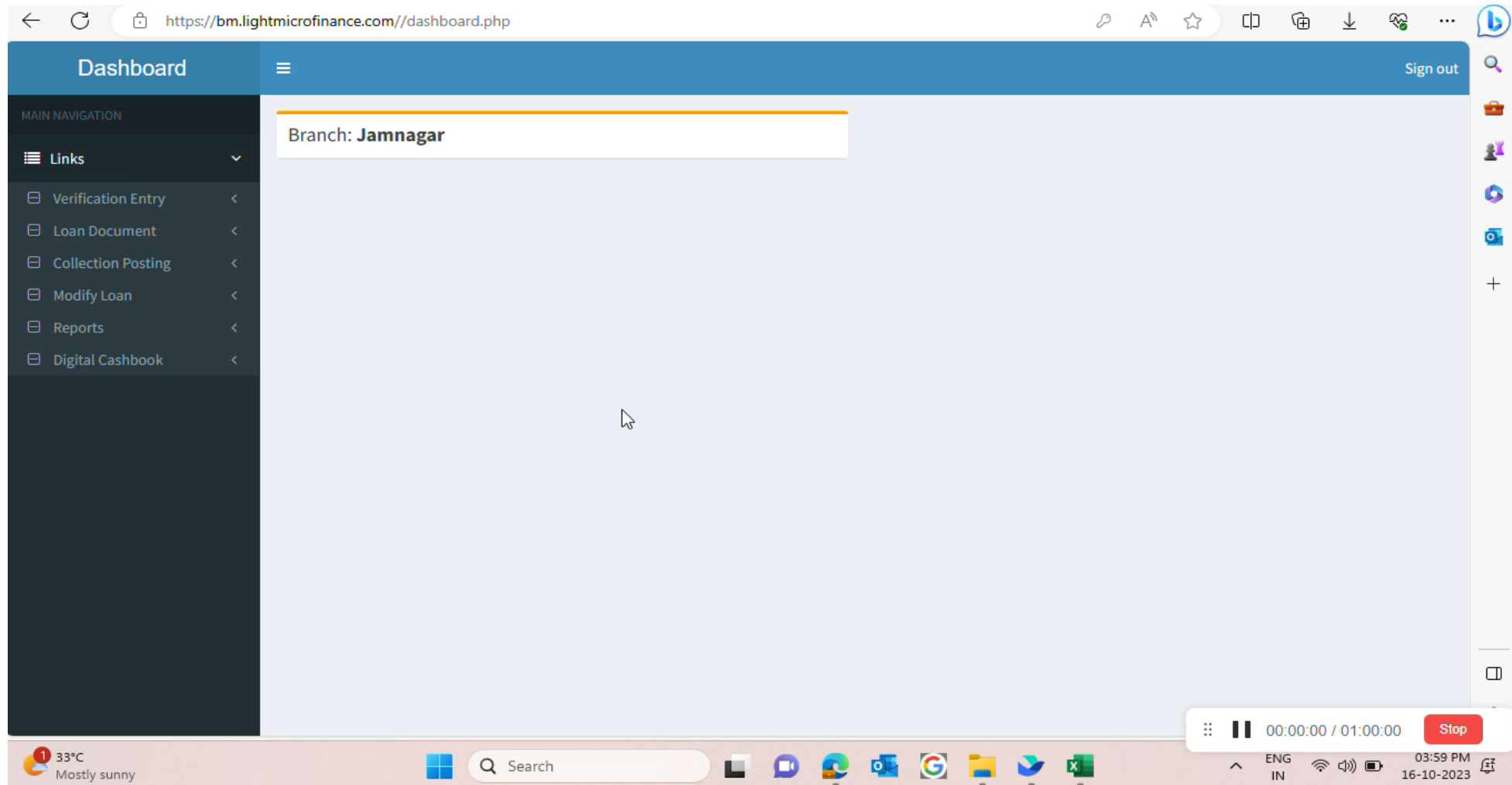
 Password 

LOGIN

Version 1.0.49

Powered by: Light Microfinance Pvt. Ltd.

Collection Process-BM Dashboard Pay by link(BM/BOM)



The screenshot displays a web browser window with the URL <https://bm.lightmicrofinance.com//dashboard.php>. The page features a blue header with the word "Dashboard" on the left and a "Sign out" link on the right. A left sidebar contains a "MAIN NAVIGATION" menu with the following items: "Links" (expanded), "Verification Entry", "Loan Document", "Collection Posting", "Modify Loan", "Reports", and "Digital Cashbook". The main content area has a light blue background and displays "Branch: Jamnagar" in a white box at the top. A vertical toolbar on the right side of the main area contains several icons, including a magnifying glass, a shopping cart, a person icon, a gear, a camera, and a plus sign. The Windows taskbar at the bottom shows the system clock as 03:59 PM on 16-10-2023, along with weather information (33°C, Mostly sunny) and various application icons.

Collection Process- Light Money Application (Customer)



Collection Process- PTP Remarks add in Mobilight

12:58 PM | 0.0KB/s

Logout

Hello, LMF09903

Office

Dhanpur


ID


296


V: 1.0.62


Type 1


Services


Add Client - Offline

Add Client - Online

Credit Check

Collections

Pre-Approved Client List

Geo-Tagging

UPLOAD DATA


Collection Process- How will Customer get Digital Receipt?

1. On due date when FE will Complete cash collection from Customer, he/she will do the entry in Mobilight. After which client will receive confirmatory text message on **registered mobile number with date of payment, Amount and FE Staff ID** so that customer gets acknowledgment of EMI paid.



2. When FE will complete his collection of all centers he will verify the cash and hand it over to BOM/BM for collection posting at Branch. After which customer will receive **text message on registered mobile number which will have the link of digital receipt. Once click on the link to open Digital receipt.**

Collection Process- How will Customer get Digital Receipt?

		લાઈટ માઈક્રો ફાઈનાન્સ પ્રા. લિ. ૩૧૦, પિનેક્લ બિઝનેસ પાર્ક, કોર્પોરેટ સેડ, પ્રહલાદનગર, અમદાવાદ-૩૮૦૦૧૫. ફરિયાદ નિવારણ અધિકારી સંપર્ક : ૦૦૯-૪૧૦૫૦૮૬૨ હેડ ઓફિસ ફોન : ૦૦૯-૪૦૦૫૦૦૫૯	
ચૂકવણી રસીદ			
ગ્રાહકનું નામ: Rabari Manisha Ben	લોનની આઈ.ડી.: 3096620	✓ હુખાની રકમ	
તારીખ: 06-07-2024	સેન્ટર આઈ.ડી.: 2991092	ક્રમ સંખ્યા :	
ગ્રામનું નામ : Waghodia	સ્ટાફ આઈ.ડી. : 10140	50/2991092/10140/70098703	
ડિનોમિનેશન :	લોનની ચૂકવણી મેળવી (રકમ)	પરત ચૂકવણી નોંધ (લોન આઈ.ડી. - સમ્ય આઈ.ડી.)	
2000 x	Rs. 3300	3096620 - 3445475	
1000 x			
500 x			
200 x			
100 x			
50 x			
20 x			
10 x			
5 x			
સિદ્ધ / 10 x			
5 x			
2 x			
1 x			
કુલ મેળવેલ રકમ :			
આ કોમ્પ્યુટર દ્વારા જનરેટ કરેલ રસીદ છે અને તેથી તેના પર સહીની જરૂર નથી		અધિકાર ક્ષેત્ર: અમદાવાદ	


Once customer will click on link received in text message PDF copy of Digital receipt will be available for customers will all details like **Name, Date ,Branch Name, Loan ID, Center ID,EMI Amount paid.**

Important things to be explained to Clients during Collection

Below Points should be explained to clients during sourcing as well as collection for their knowledge and financial safety.

- ❖ **Do not trust** any member of group blindly with your documents and EMI.
- ❖ Pay EMI **to Light Employee personally only** along with getting receipt.
- ❖ No one is leader in center (All are equally responsible) and no one has authority to collect EMI from all clients. **Only Light Employee will collect EMI personally from all the clients during center meeting.**
- ❖ **Beware of people** who gives fake promises for providing loan in return of money.
- ❖ Loans are given to clients on basis of their **documents and CIBIL**, So no third party can arrange loan for them.
- ❖ Clients to be informed that **not to entertain any person other than Light employee** to get loan.

Collection Process-Manual Receipt

		લાઈટ માઈક્રોફાઈનાન્સ પ્રા. લિ. ૩૧૦, પિનેકલ બિઝનેસ પાર્ક, કોર્પોરેટ રોડ, પ્રહલાદનગર, અમદાવાદ-૩૮૦૦૧૫. ફરિયાદ નિવારણ અધિકારી સંપર્ક : ૦૭૯-૪૧૦૫૭૮૬૨ હેડ ઓફિસ ફોન : ૦૭૯-૪૦૦૫૦૦૫૯	
ચૂકવણી રસીદ			
તારીખ :	સેન્ટર આઈ.ડી. :	કુલ સભ્યો :	ક્રમ સંખ્યા : WGHD 20620
બ્રાંચનું નામ : વાઘોડીયા રોડ	સ્ટાફ આઈ.ડી. :	કુલ હાજર સભ્યો :	
<input type="checkbox"/> હપ્તાની રકમ <input type="checkbox"/> વી.એ.આર.	<input type="checkbox"/> લોનની પૂર્વ ચૂકવણી <input type="checkbox"/> સભ્ય ફી	<input type="checkbox"/> લોન પ્રોસેસિંગ ફી <input type="checkbox"/> વીમા ફી	
ડિનોમિનેશન :	વી.એ.આર. મેળવ્યું (સભ્ય આઈ.ડી. અને રકમ)	લોનની પૂર્વ ચૂકવણી મેળવી (સભ્ય આઈ.ડી. અને રકમ)	પરત ચૂકવણી મેળવી (સભ્ય આઈ.ડી.)
2000 x			
1000 x			
500 x			
200 x			
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50 x			
20 x			
10 x			
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સિસ્ટા / 10 x			
5 x			
2 x			
1 x			
કુલ મેળવેલ રકમ :			
સ્વયં સેવક/સભ્યની સહી	સ્ટાફની સહી	બ્રાંચ ઓપરેશન મેનેજરની સહી	અધિકાર ક્ષેત્ર : અમદાવાદ

Valid Upto 30/06/2023 તા. ૩૦-૦૬-૨૦૨૩ સુધી માન્ય W = Customer Copy | Y= H.O. Copy

Date

Type of Collection

Total Denomination

Total Cash

Center Name to be Mentioned

Total and Present clients

Staff ID


Sign of Member


Sign of Employee

Center Meeting Process-Cash Handover Slip

Cash Handover Slip						
Date Of Meeting: 01-07-2024			Employee Name: Sunil Jada			
Sr. No	Center Name/ID	Total Collection in Rs	Denomination			Remarks
			Currency in Rs	Numbers	Total in Rs	
1	Amin khadki	11,850	500	76	38,000	
2	Amrol ABC	13,400	200	7	1,400	
3	Dabhase rod	6,050	100	13	1,300	
4	Padra Vrindavan	10,050	50	12	600	
5			20	2	210	
6			10	1	10	
7			5			
8			2			
9			1			
10						
Total in Rupees		41,350			41,350	

Received cash as mentioned above.

FE Signature: 

BM/BOM Signature: 

- ❖ After completing your collection, come to the branch and calculate the cash you have collected and together submit the cash handover slip
- ❖ BOM will count all cash and match the cash handover slip, will confirm and update in the system.
- ❖ BOM will not accept cash without this cash handover slip.

Center Meeting Process-Cash Deposit in Bank

Bank Name	Beneficiary name	Account No	ISFC code	Branch Name
ICICI Bank	Light Microfinance Pvt Ltd	58605003707	ICIC0000586	100 Feet Road Ahmedabad
SBI	Light Microfinance Pvt Ltd	37911129314	SBIN0063765	Sanad Branch
IDFC Bank	Light Microfinance Pvt Ltd	10000186193	IDFB0040101	BKC - Naman Branch
PNB	Light Microfinance Pvt Ltd	22451132000200	PUNB0015710	KADI, THAL ROAD

- ❖ FE can deposit his collected cash in bank and provide deposit slip to BOM.
- ❖ FE can also deposit his cash to BOM at Branch at EOD as per standard process.

Do's and Don't's in Manual Receipt

Receipt Book Errors to Avoid

- No use of Carbon Paper
- Use of Pen
- Overwriting
- Skipping of unused receipt
- Customer Copy Not Handed Over
- Misprint copy of receipt
- Wrong updated in system

Things to be checked in Receipt Book

- Date
- Denomination
- Member Signatures
- Employee Signature
- Center/Member ID Nos
- Collection Type
- Total and Present members

Note: Any kind of deviations in Receipt Book should be approved by DM(Business)

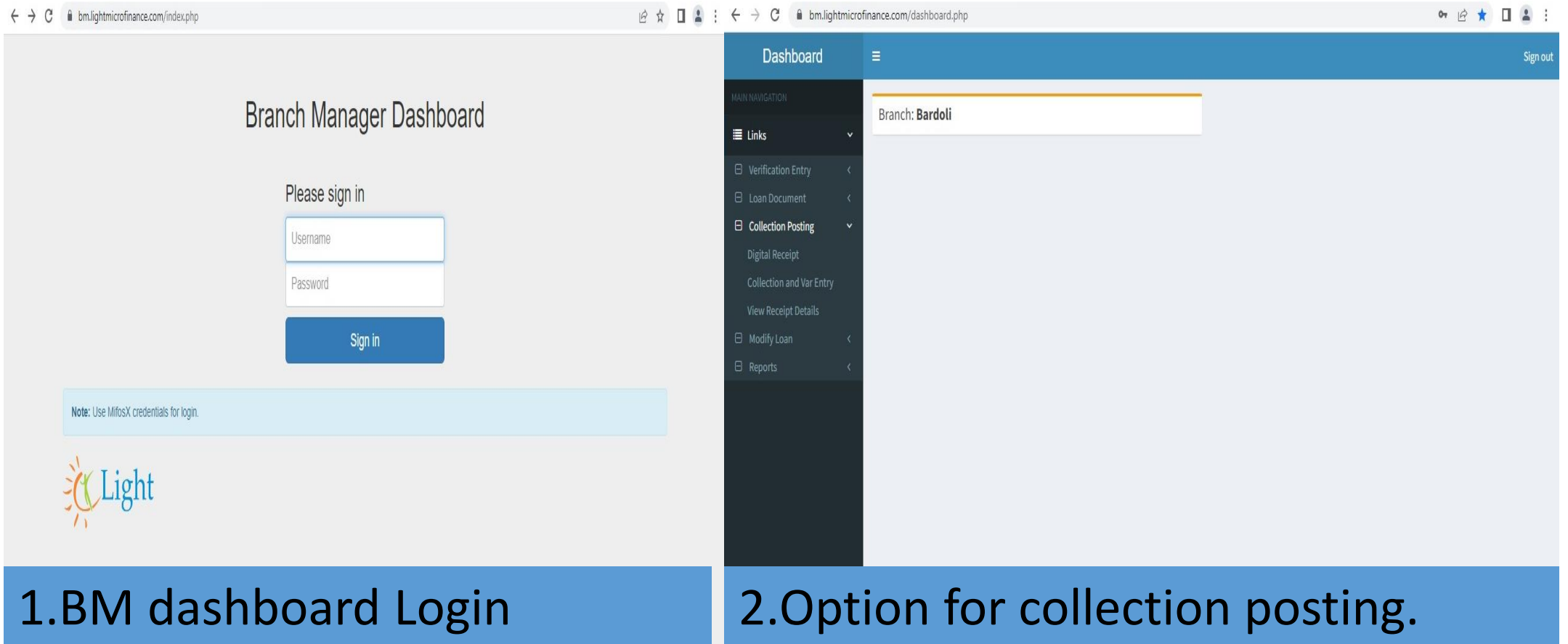
Collection Posting

- BOM has to access BM dashboard to post regular as well as VAR collection and also collection from digital receipt.
- In Digital receipt collection posting 2 entry for same client will be seen red. BOM will check and approve only 1 entry.

Note:

- If green tick not came due to error then 1 excel sheet will be generated ,don't post the collection again .
- Send that sheet and receipt to EOD team and they will do posting.

Collection Posting



The screenshot displays two web pages from the Light Finance system. The left page is the 'Branch Manager Dashboard' login screen, featuring a sign-in form with fields for 'Username' and 'Password', a 'Sign in' button, and a note about MifosX credentials. The right page is the 'Dashboard' for the 'Bardoli' branch, showing a sidebar with navigation links. The 'Collection Posting' link is highlighted, and its sub-menu items are visible.

Branch Manager Dashboard

Please sign in

Username

Password

Sign in

Note: Use MifosX credentials for login.

Light

Dashboard

Sign out

Branch: Bardoli

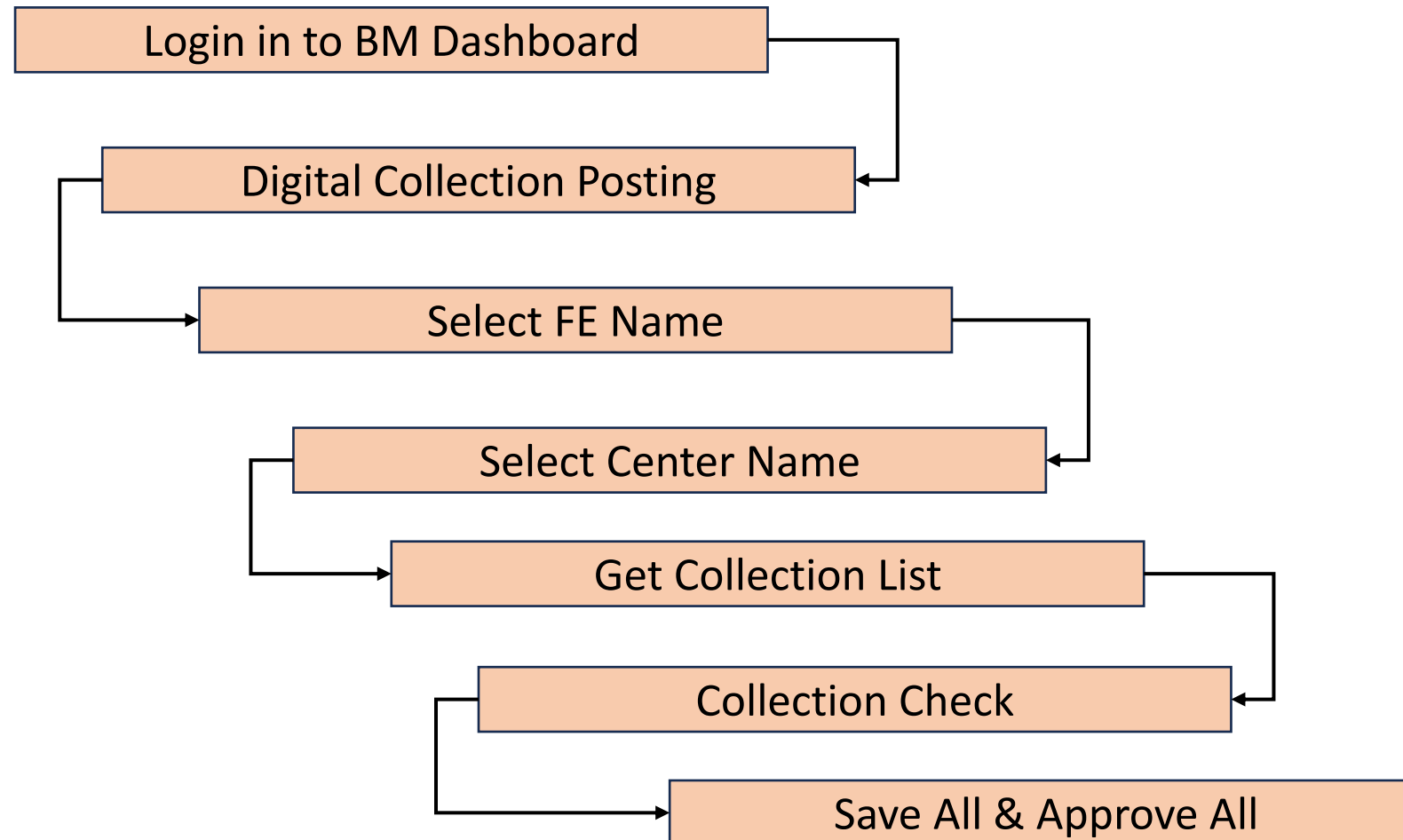
MAIN NAVIGATION

- Links
- Verification Entry
- Loan Document
- Collection Posting
 - Digital Receipt
 - Collection and Var Entry
 - View Receipt Details
- Modify Loan
- Reports

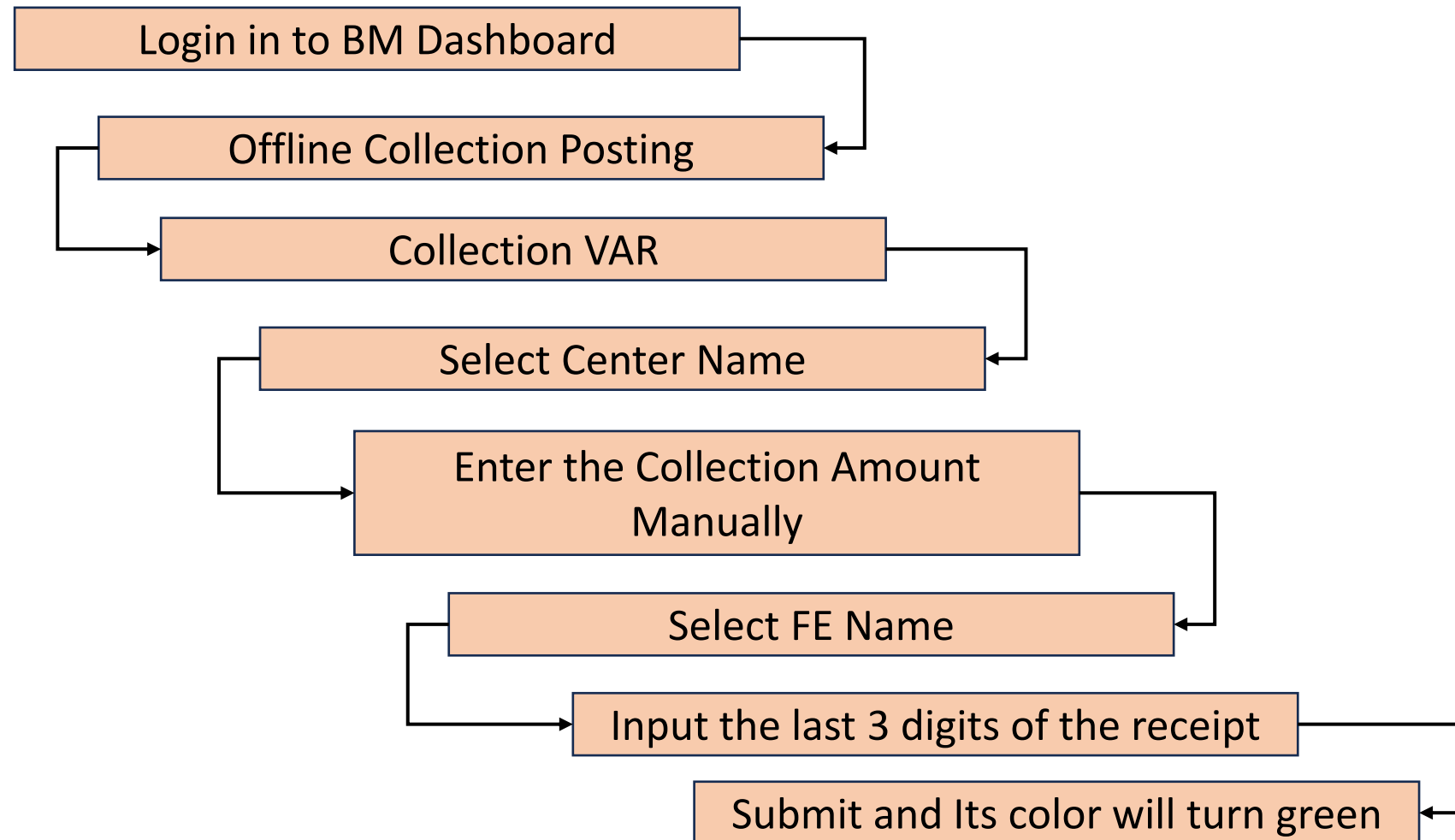
1.BM dashboard Login

2.Option for collection posting.

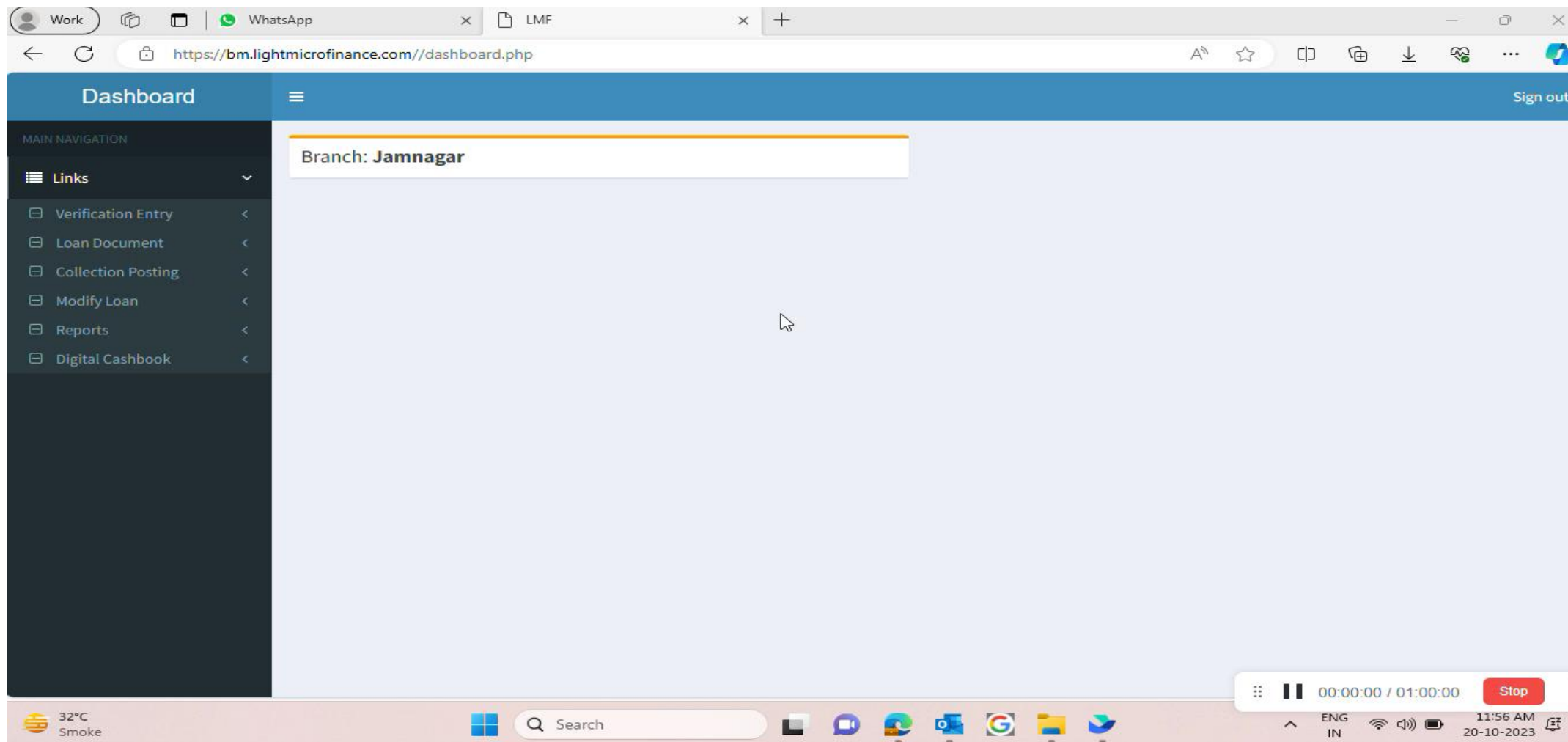
Collection Posting-Digital Receipt



Collection Posting-Manual Receipt



Collection Posting Manual Receipt



The screenshot displays a web browser window with the URL <https://bm.lightmicrofinance.com//dashboard.php>. The browser's address bar shows the URL, and the page title is "Dashboard". The dashboard interface features a dark blue header with a "Sign out" button. A left sidebar contains a "MAIN NAVIGATION" menu with the following items: "Links", "Verification Entry", "Loan Document", "Collection Posting", "Modify Loan", "Reports", and "Digital Cashbook". The main content area is light blue and displays a "Branch: Jamnagar" label. At the bottom of the screen, a Windows taskbar is visible, showing the system clock at 11:56 AM on 20-10-2023, the language set to ENG IN, and a video player interface with a "Stop" button.

Collection Posting Digital Receipt



Branch Manager Dashboard

Please sign in

Please fill out this field.

Sign in

Note: Use MifosX credentials for login.



00:00:00 / 01:00:00 Stop



Collection Report Verification

(1) WhatsApp x Login x +

bm.lightmicrofinance.com

Branch Manager Dashboard


Please sign in

Username

Password Please fill out this field.

Sign in

Note: Use MifosX credentials for login.



Type here to search

screenrec

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ENG 03:05 PM
US 20-10-2023

Payment Types in Regular transaction data

55_regular_transaction_data_15_10_23_17_2... Search

File Home Insert Formulas Data Review View Automate Help

Font: 11, A, A, General, Conditional Formatting, Format as Table, Cell Styles, Insert, Delete, Format, Sort & Filter, Find & Select

PaymentType

	M	N	O	P	
	FundName	Source of fund	Loan_Status	PaymentType	
ut_hospicash	Kissandhan TL (16 March 2023) 10 Cr		Active	IDFC BBPS	LMF
ut_hospicash	Kissandhan TL (16 March 2023) 10 Cr		Active	payment_digital_intent	LMF
ut_hospicash	Kissandhan TL (16 March 2023) 10 Cr		Active	payment_digital_link	LMF
000	Annapurna DA (31 March 2023)		Active	payment_digital_qr	LMF
000	IDFC DA (29 April 2023)		Active	PaymentType-Cash	LMF
ut_hospicash	ESAF TL (14 Nov 2022) 20 Cr		Active	PaymentType-digitalreceipt	LMF

Types of Remarks in Payment Type	Mode Of Payment
IDFC BBPS	Client has Paid her EMI directly through UPI
payment_digital_intent	Client has Paid her EMI through Light Money Application
payment_digital_link	Client has Paid her EMI Through link sent by FE/BM/BOM from Mobilight/BM Dashboard
payment_digital_qr	Client has Paid her EMI Through QR code shown by FE from Mobilight at center
PaymentType-Cash	Client has Paid her EMI Through Cash and Manual receipt Issued
PaymentType-digitalreceipt	Client has Paid her EMI Through Cash and Digital receipt Issued

Collection Posting-Cash Tally at EOD

- After all posting is done generate reports called transaction data report to verify the collection posting.
- Amount of Online payment done by client to be shown separately in cash book.
- Bank deposit denomination to be shown in cash book.
- At last tally the cash with physical and system.

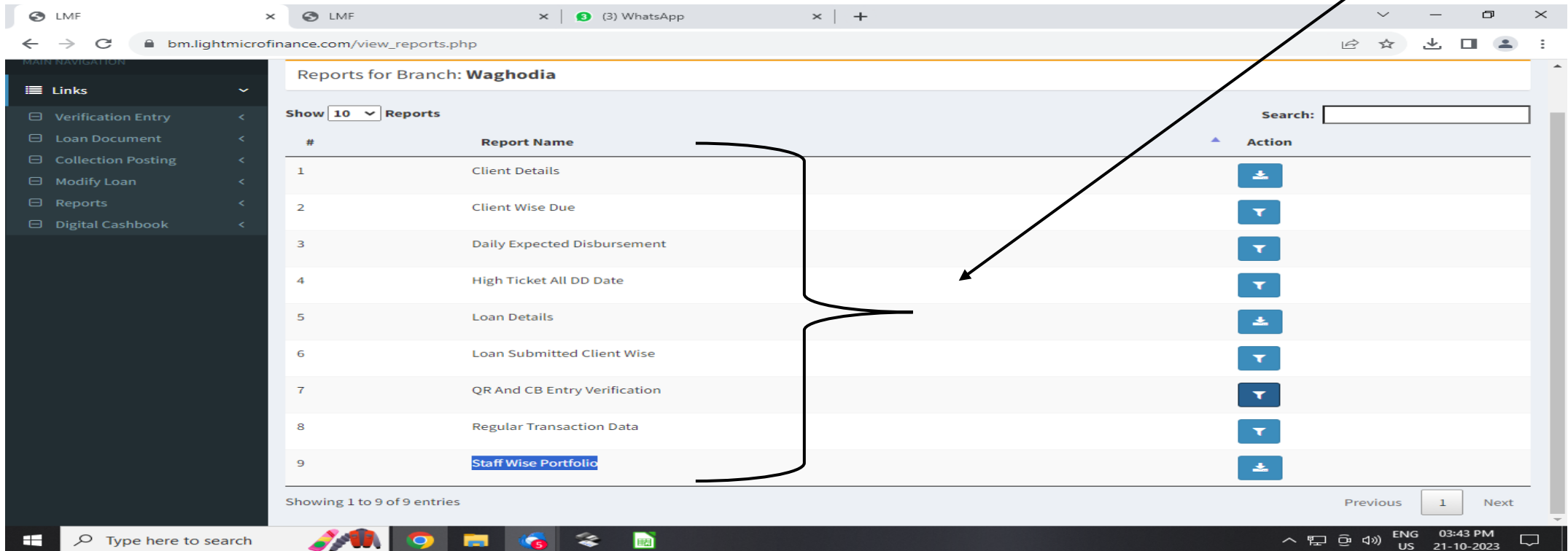
Report Function Usage in BM dashboard

BM Dashboard
Login By BOM/BM

Click on Links

Select Reports

9 different reports
can be used as per
need.



The screenshot shows the 'Reports for Branch: Waghodia' page. On the left is a 'MAIN NAVIGATION' sidebar with a 'Links' menu containing: Verification Entry, Loan Document, Collection Posting, Modify Loan, Reports, and Digital Cashbook. The main content area has a 'Show 10 Reports' dropdown and a search bar. Below is a table with 9 reports, each with an 'Action' column containing download and expand icons. A bracket groups the first 8 reports, and an arrow points from the text '9 different reports can be used as per need.' to the 'Staff Wise Portfolio' report. The footer shows 'Showing 1 to 9 of 9 entries' and pagination controls.

#	Report Name	Action
1	Client Details	[Download] [Expand]
2	Client Wise Due	[Download] [Expand]
3	Daily Expected Disbursement	[Download] [Expand]
4	High Ticket All DD Date	[Download] [Expand]
5	Loan Details	[Download] [Expand]
6	Loan Submitted Client Wise	[Download] [Expand]
7	QR And CB Entry Verification	[Download] [Expand]
8	Regular Transaction Data	[Download] [Expand]
9	Staff Wise Portfolio	[Download] [Expand]

Report Function Usage in BM dashboard

Let's see how these reports are useful and which data do they provide

1. Client Details

- All Data of Customers like Group Id ,Center Id, Client active/Close Status ,Address ,Mobile Number.
- CB status of client can also be checked.
- Client details can be searched in this report using Aadhar number also.

2. Client Wise Due

- Clients EMI Paid or not can be checked.
- Previous months repayment date also available.

3. Daily Expected Disbursement

- All offline DBT clients pending for DBT are seen here and remarks to be sent to DBT team for Pending Reasons.

Report Function Usage in BM dashboard

Let's see how these reports are useful and which data do they provide

4.High Ticket All DD Date

- FE wise DD pass fail status can be checked with rejection remarks.

5.Loan details

- Client Loan Status can be checked (Active, Closed, Overpaid, Rejected, Pending, Write-off)
- All clients whose details are entered in Mobilight will be seen.
- Even Clients rejected in DD by BCM will be seen with Remarks.

6.Loan Submitted Client Wise

- New Loan entry done will be seen in this report.

7.QR and CB Entry Verification

- FE wise CB check and pass-fail status can be checked.

Report Function Usage in BM dashboard

Let's see how these reports are useful and which data do they provide

8.Regular Transaction Data

- To check Collection data and do EOD.

9.Staff Wise Portfolio

- Portfolio handled by FE in terms of clients and amount can be checked.