

Customer Recovery

ATHARVANA INFOTECH PVT LTD

Plot.No.65,
Shiva Shakti Theatre Lane,
Anupuram, A. S. Rao Nagar,
Kapra,
Hyderabad - 500 062,
INDIA.



Revision History

Author	Revision	Date	Edit Log

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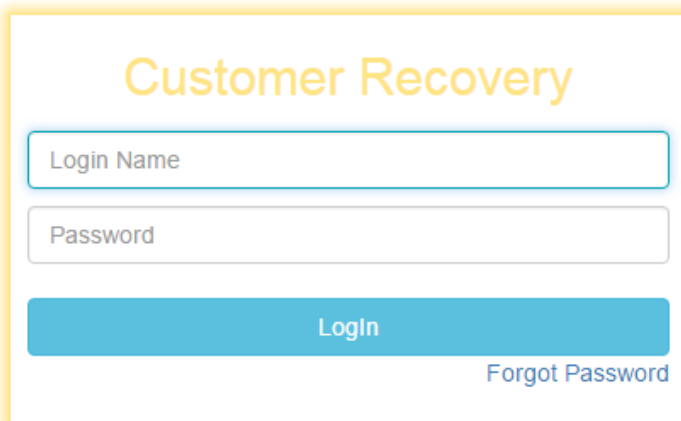
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User Manual for Customer Recovery

- First of all user need to open the Chrome /Internet Explorer and write the below Website address in Address bar of Chrome /Internet Explorer.

<http://183.82.102.8/CR/login.aspx>

- Now you will have to click on Enter site.
- After Click on Enter site you will get the page which looks like below image.



Customer Recovery

Login Name

Password

Login

[Forgot Password](#)

1. Login Form

Customer Recovery Login Form available for four types of Users.

1. Superadmin:

- You can access all forms of Customer recovery application.
- If any new Entries or updates in Daily transactions, superadmin will get a mail alert to registered E-mail id.
- Superadmin can create and update any records throughout the application wise.
- Superadmin can view all type of reports like Admin wise, Manager Wise and Executive wise.
- Superadmin can change the Managers and executive locations from one city to other cities.

2. Admin:

- You can access all forms of Customer recovery application.
- If any new Entries or updates are done by Admin in Daily transaction menu those details will be mailed to super admin and Admin level users.
- Admin has rights to create, update and view any records, city wise throughout the application.
- Admin can view the reports based on city wise, Admin Wise, Manger wise and Executive wise.
- Admin can change the Managers and executive locations from one city to other cities.

3. Manager:

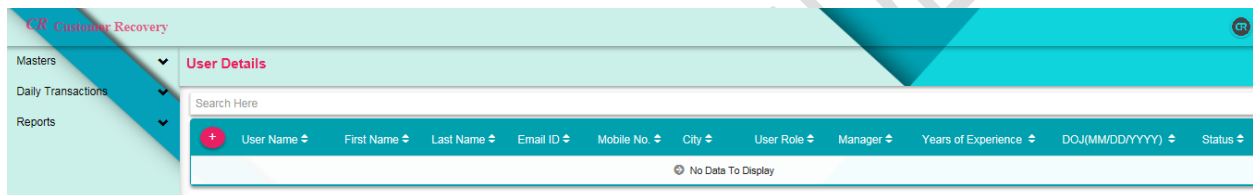
- You can access all forms of Customer recovery application.

CUSTOMER RECOVERY

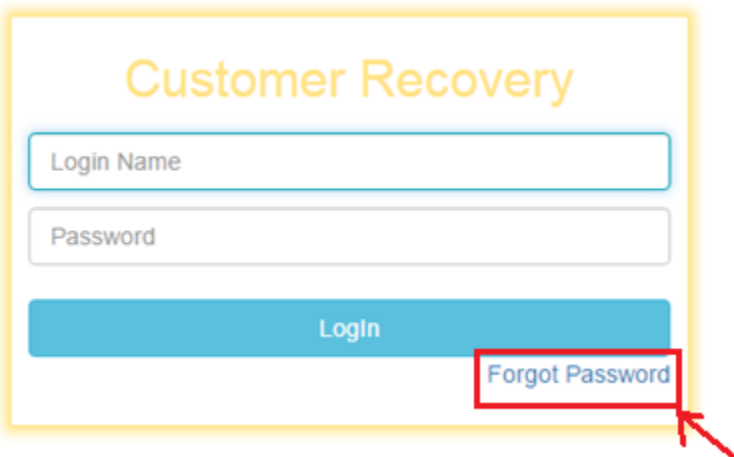
- If any new Entries or updates are done by Manager in Daily transaction menu those details will be mailed to superadmin, Admin and Manager level users.
- Manager has rights to create, update and view any records city wise, throughout the application.
- Manager can view the reports based on city wise, Manger wise and Executive wise.

4. Employee:

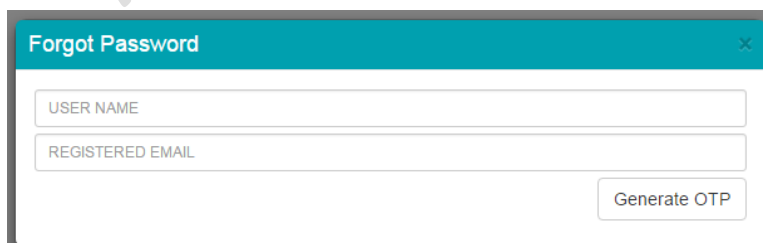
- You can access all forms of Customer Recovery application except user details, Add bank details, Add loan details, add /Edit Target details.
 - If any new Entries or updates are done by Executive in Daily transaction menu those details will be mailed to superadmin, Admin, Manager and Executive level users.
 - Executive has rights to create, update and view any records only in daily transaction menus and he/her has only rights to view the Masters menu. Executive can view the reports based on city wise and Executive wise.
- If you are the new user enter the Login Name, Password and click on Login button, then user will see all the menus and below mentioned screen.



2. Forgot Password:

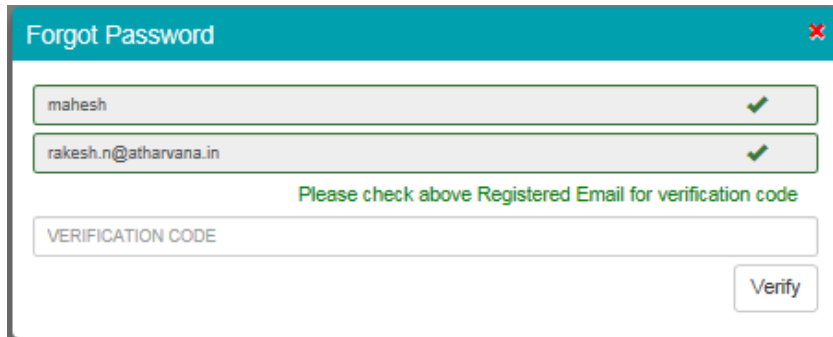


- Click on the Forgot Password link then forgot password popup is displayed with following screen.



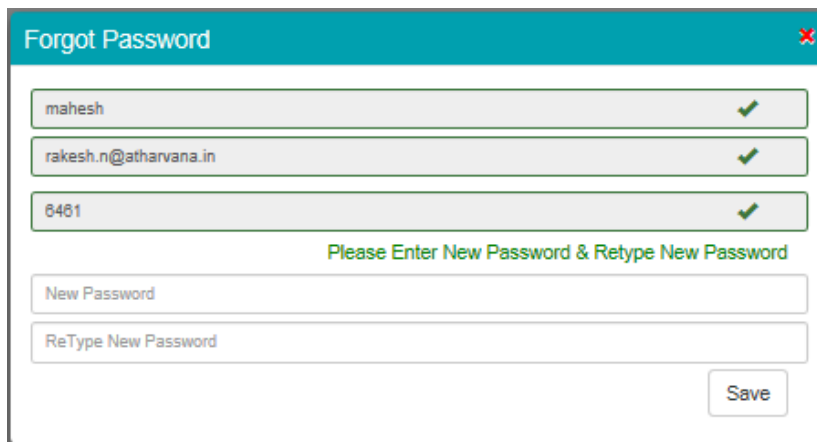
CUSTOMER RECOVERY

- Enter the Username and Registered Email and click on “Generate OTP” button.
- Generated OTP of verification code will be sent to the registered Mail ID



The screenshot shows a web form titled "Forgot Password" with a red close button in the top right corner. It contains three input fields: "Username" with the value "mahesh", "Registered Email" with the value "rakesh.n@atharvana.in", and "Verification Code" which is currently empty. Each of the first two fields has a green checkmark icon to its right. Below the email field, a green message states: "Please check above Registered Email for verification code". A "Verify" button is located at the bottom right of the form.

- Enter the code into verification code text box and click on verify button.



The screenshot shows the same "Forgot Password" form, but now the "Verification Code" field contains the value "6461" and has a green checkmark. A new green message appears: "Please Enter New Password & Retype New Password". Below this, there are two new input fields: "New Password" and "ReType New Password". A "Save" button is located at the bottom right of the form.

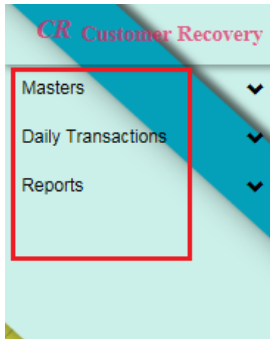
- Fill the New password and Retype New password and click on save button, then new password will be saved successfully, now user can login with changed password details.

Menu Types

The Menus are divided into mainly three Types in Customer Recovery application and they are:

- Masters
- Daily Transactions
- Reports

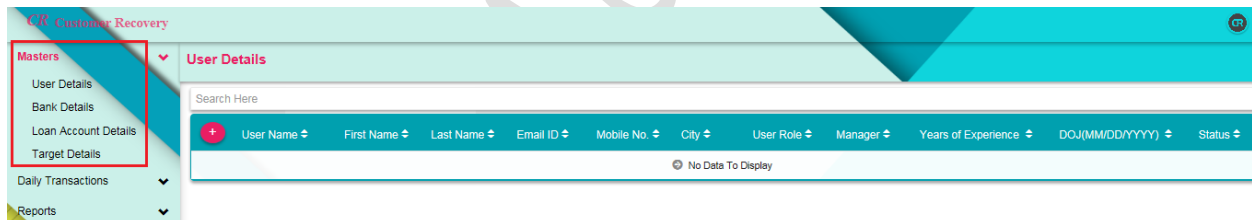
All the menus and submenus are listed and their functionality is described below.



Masters

Masters menu contains the following submenus and is listed below. They are


- User Details
- Bank Details
- Loan Account Details
- Target Details



All the submenus functionality is explained with screenshot in subsequent sections.

3.1. User details:

3.1.1. Add User details:

New user can be created by clicking on  "Create New User" option.

CUSTOMER RECOVERY

New User

*User Name

*First Name

*Last Name

*Mobile No.

*Email Address

*Password

*Confirm Password

Address

*City

*User Role

*Years of Experience


*Date of Joining(dd/mm/yyyy)

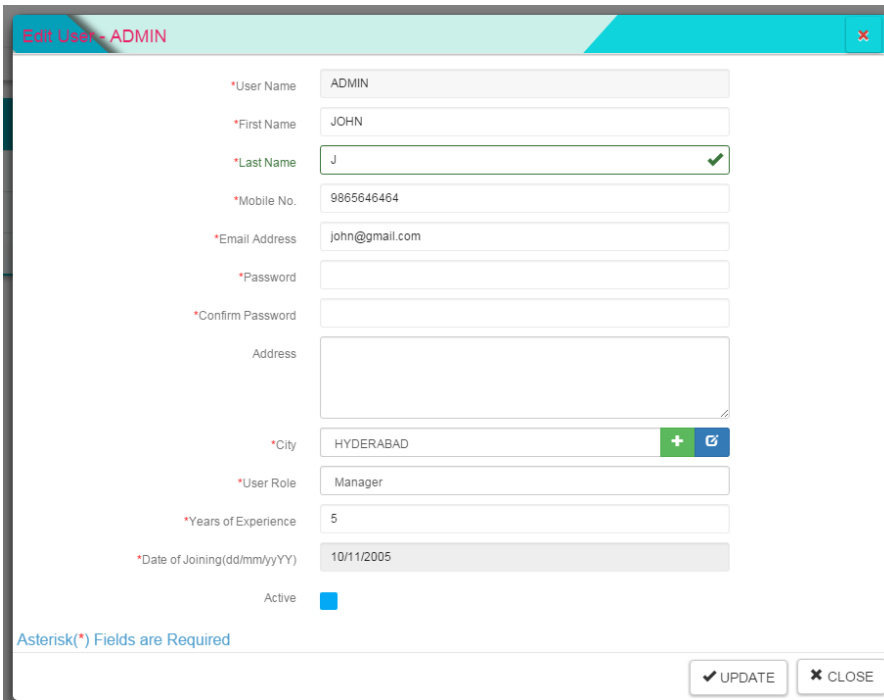
Active ☒

Asterisk(*) Fields are Required

- Fill in the details in the fields marked with asterisk and click on save option and you will get the Confirmation message as "Successfully New user created".
- In "Search Filter" section users can be searched and listed using "User Name", "Email id", "Phone" "City", "User Role", "Years of Experience".
- User can select number of users to view in the form using predefined record selection shown besides Page numbering.
- User can click on the hide option in the saved record then view the remaining field details (fields are not mentioned in the grid columns).
- By using down arrow option, user can Export the Data in XLS, XLSX & PDF Formats by selecting the Export feature.
- If user clicks on Close button then displayed user details form is closed.
- Created all the user details records will display in the user details grid.

3.1.2. Edit User Details:

- User can modify the User details, by using “Edit User” option .



Edit User - ADMIN

*User Name: ADMIN

*First Name: JOHN

*Last Name: J ✓

*Mobile No.: 9865646464

*Email Address: john@gmail.com

*Password:

*Confirm Password:

Address:

*City: HYDERABAD +

*User Role: Manager

*Years of Experience: 5

*Date of Joining(dd/mm/yyYY): 10/11/2005

Active: ☒

Asterisk(*) Fields are Required

✓ UPDATE ✕ CLOSE

- After Modifying the required details and clicking on the “Update” button and displays the conformation message as “User details updated successfully”.
- By clicking on close option then displayed popup window is closed.
- User can change the user details status from active to inactive and can change from Inactive to active and an Inactivated users will not populate in anywhere in the entire application.

3.2. Bank Details:

3.2.1. Create Bank Details


- Superadmin, Admin and Manager level users can create a new “Bank details” using the form shown below.

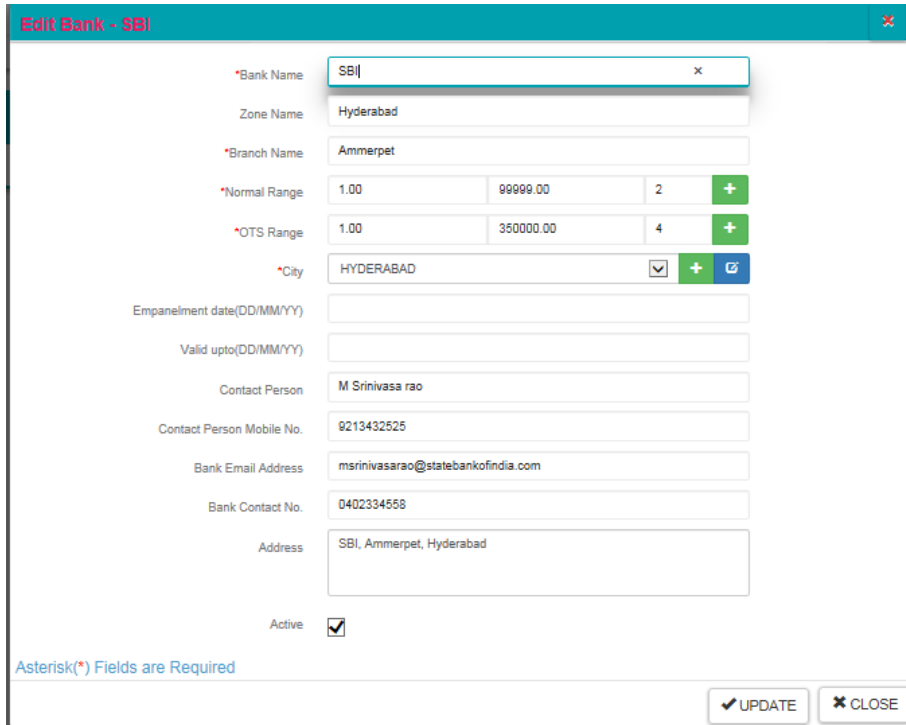
- This form can be accessed by clicking “Create New Bank details”  button in “Bank details” form.

- Fill in the details in the fields marked with asterisk and click on save option and you will get the Confirmation message “New Bank saved successfully”.
- Created Bank details will populated in the “Bank details” grid.
- In “Search Filter” section users can be searched and listed using “bank Name”, “Zone Name”, “Branch Name” “City”, “Empanelment date” and “Valid up to”.
- User can select number of Banks to view in the form using predefined record selection shown besides Page numbering.
- User can click on the hide option in the saved record and view the remaining field details (fields are not mentioned in the grid columns).

- By clicking on down arrow option, user can Export the Data in XLS, XLSX & PDF Formats by selecting the Export feature.
- If user clicks on Close button then displayed bank details form is closed.

3.2.2. Edit Bank details:

Superadmin/Admin /Managers can edit or update the Bank details using “Edit Bank details” option .



Edit Bank - SBI

*Bank Name: SBI

Zone Name: Hyderabad

*Branch Name: Ammerpet

*Normal Range: 1.00 99999.00 2 +

*OTS Range: 1.00 350000.00 4 +

*City: HYDERABAD +

Empanelment date(DD/MM/YY):

Valid upto(DD/MM/YY):

Contact Person: M Srinivasa rao

Contact Person Mobile No.: 9213432525

Bank Email Address: msrinivasarao@statebankofindia.com

Bank Contact No.: 0402334558

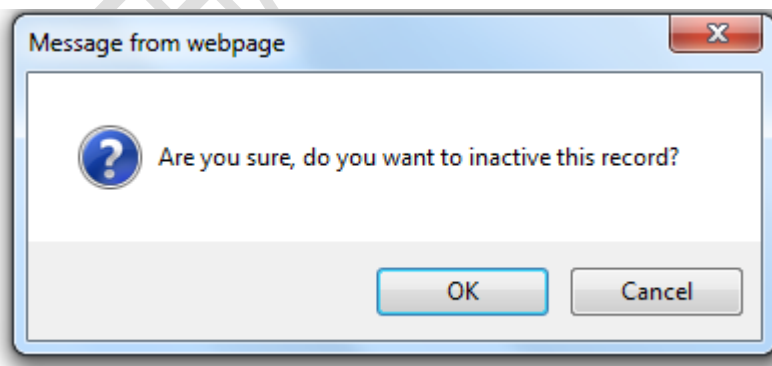
Address: SBI, Ammerpet, Hyderabad

Active: ☒

Asterisk(*) Fields are Required


UPDATE CLOSE

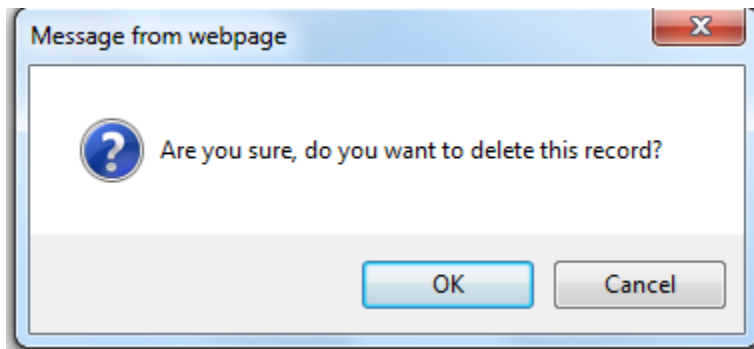
- After Modifying the required details and clicking on the “Update” button and displays the conformation message as “successfully SBI updated”.
- By clicking on close option then displayed popup window is closed.
- User can change the Bank details status from active to inactive and can change from Inactive to active.



- Click on ok button then displayed message as “Successfully inactivated” and status also changed from active to inactive.
- Inactivated banks will not populate anywhere in an entire application.

3.2.3. Delete Bank details:

- Superadmin/Admin/Manager Level Users can delete the Bank Details.
- Choose the required delete record in the bank details grid and click on delete icon  option, popup is displayed with confirmation message as “are you sure, do you want to delete this record?”




- Click on ok button then displayed message as “Record deleted successfully” and if user clicks on cancel then displayed popup is closed.
- If user try to delete the used loan account record then message is displayed as “deleted record, already it is in use”.

3.3. Loan Account Details:


3.3.1. Create Loan Account Details:

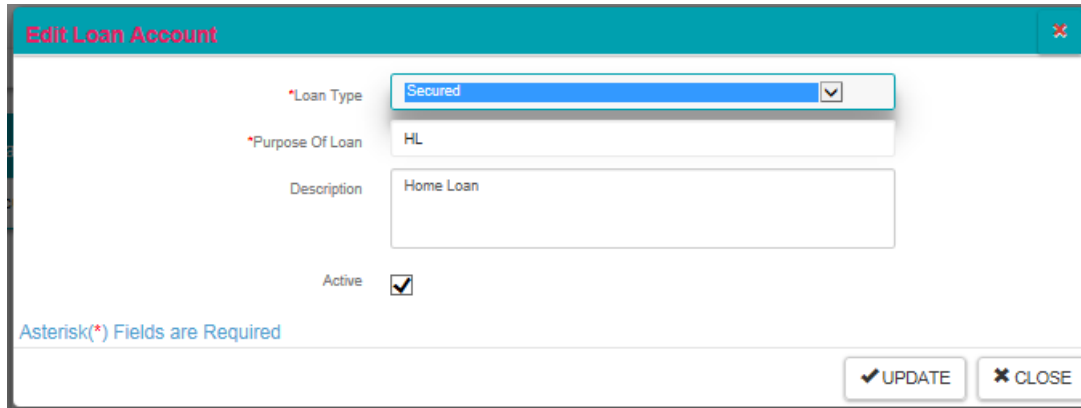
Super admin, Admin and Manager level users can create a new “Loan Account Details” using the form shown below.

This form can be accessed by clicking “Create Loan Account Details”  button in “Loan Account Details” form.

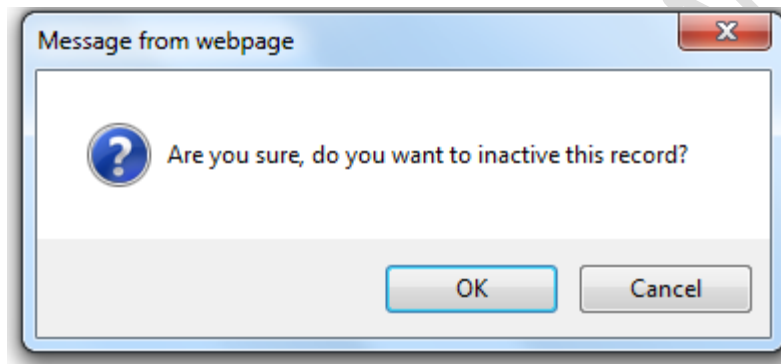
- Fill in the details in the fields marked with asterisk and click on save option and you will get the Confirmation message “Successfully Loan account saved”.
- Created Loan account details will populated in the “Loan account details” grid.
- In “Search Filter” section users can be searched and listed using “Loan account type”, “Purpose of Loan” and “Description”.
- User can select number of Loans to view in the form using predefined record selection shown besides Page numbering.
- User can click on the hide option in the saved record and view the remaining field details (fields are not mentioned in the grid columns).
- By clicking on down arrow option, user can Export the Loan account Details in XLS, XLSX & PDF Formats by selecting the Export feature.
- If user clicks on Close button then displayed Loan account details form is closed.

3.3.2. Edit Loan Account details:

Superadmin/Admin/Manager Users can edit and update the Loan Account Details using “Edit Loan Account Details” option .




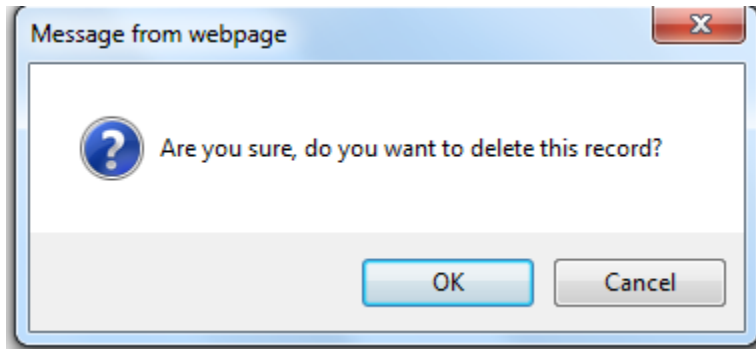
- After Modifying the required details and clicking on the “Update” button and displays the conformation message as “successfully Loan account updated”.
- By clicking on close option then displayed popup window is closed.
- User can change the user details status from active to inactive and can change from Inactive to active.



- Click on ok button then displayed message as “Successfully inactivated” and status also changed from active to inactive.
- Inactivated users will not populate in anywhere in the entire application.

3.3.3. Delete Loan Account details:

- Superadmin/Admin/Manager Level Users can delete the Loan Account Details.
- Choose the required delete record in the Loan account details grid and click on delete icon  option, popup is displayed with confirmation message as “are you sure, do you want to delete this record?”

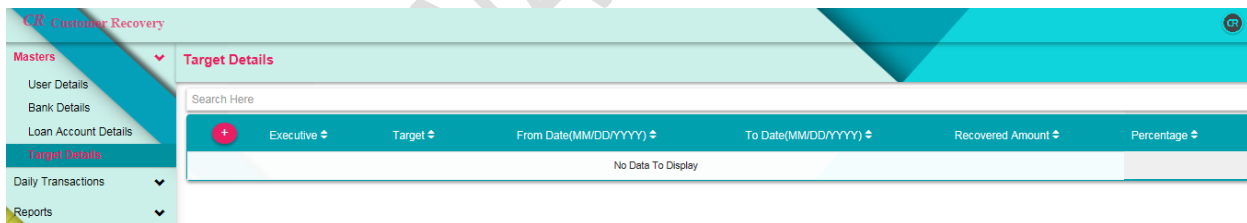


- Click on ok button then displayed message as “Record deleted successfully” and if user clicks on cancel then displayed popup is closed.
- If user try to delete the used loan account record then message is displayed as “deleted record, already it is in use”.

3.4. Target Details:

3.4.1. Create Target Details:

- Super admin, Admin and Manager level users can create “Target Details” for executive wise as shown below.



- This form can be accessed by clicking “Create Target Details”  button in “Target Details” form.

- Fill in the details in the fields marked with asterisk and click on save option and you will get the Confirmation message “Successfully New Target saved”.
- In “Search Filter” section users can be searched and listed using “Loan account type”, “Purpose of Loan” and “Description”.
- User can select number of targets to view in the form using predefined record selection shown besides Page numbering.
- User can click on the hide option in the saved record and view the remaining field details (fields are not mentioned in the grid columns).
- By clicking on down arrow option, user can Export the Target Details in XLS, XLSX & PDF Formats by selecting the Export feature.
- If user clicks on Close button then displayed Loan account details form is closed.
- Executive level user doesn’t have the features to create, edit and delete the Target details.
- There is possible to define the multiple targets for individual executives, but only one target shows in active mode.
- Created Target details will populated in the “Target details” grid.



Target Details						
Search Here						
XLS						EXPORT
+	Executive	Target	From Date(MM/DD/YYYY)	To Date(MM/DD/YYYY)	Recovered Amount	Percentage
MANAGER	1500000.00	12-10-2015	12-10-2015	11000.00	0.73	
EXECUTIVE	10000000.00	12-09-2015	12-10-2015	1100000.00	11.00	
RAJESH	25.00	12-02-2015	12-03-2015	0.00	0.00	
MAHESH	250.00	12-02-2015	12-04-2015	0.00	0.00	
VISHAL	1000.00	12-10-2015	12-10-2015	750000.00	75000.00	


3.4.2. Edit Target details:

- Super admin, Admin and Manager level users can edit and update the Target Details using “Edit Target Details”.
- After Modifying the required details and clicking on the “Update” button and displays the conformation message as “successfully Target details updated”.
- By clicking on close option then displayed popup window is closed.
- User can change the user details status from active to inactive and can change from Inactive to active.
- Inactivated details are not displayed in target details grid and as shown below:


CR Customer Recovery						
Masters	Target Details					
Daily Transactions	Search Here					
Reports	XLS					EXPORT
+	Executive	Target	From Date(MM/DD/YYYY)	To Date(MM/DD/YYYY)	Recovered Amount	Percentage
maresh					0.00	

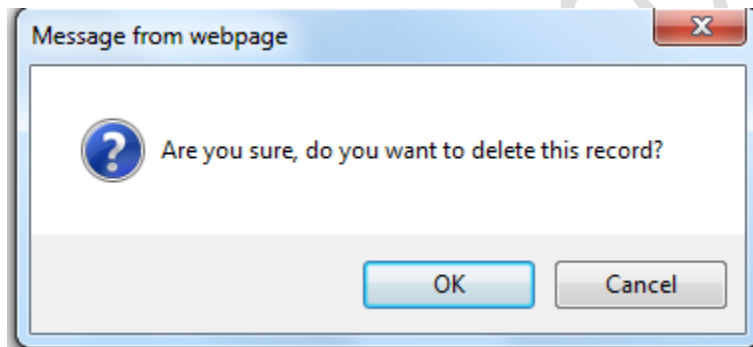
Process of Edit Target Details:

- User can edit the Target details by clicking on  the icon, then pop up will appear showing all the Individual Target details, if user needs to edit any record in popup then user should click on the  edit icon.

Target(s)					
	Executive Name	Target	From Date(MM/DD/YYYY)	To Date(MM/DD/YYYY)	Active
	MAHESH	250.00	12-01-2015	12-31-2015	ACTIVE

3.4.3. Delete Target Details:

- Superadmin/Admin/Manager Level Users can delete the Target Details.
- Choose the required delete record of the Target details in the grid, then Target popup window displayed.
- Now click on  delete icon option, popup is displayed with confirmation message as “are you sure, do you want to delete this record?”



- Click on ok button then displayed message as “Record deleted successfully” and if user clicks on cancel then displayed popup is closed.

3.5. Excel Upload

Excel upload form is used to upload the excel sheets in to the application, Uploaded data will populate in “Bank details”, “Loan account” details and “NPA “ Details forms, excel upload supports “XLS” and “XLSX” format.

Download Excel Template: This excel template provides the sample format of the excel sheet, by using this excel template user can upload the data in to the application

Sample Excel Template: This template provides the sample data format which is to be mentioned in the excel sheet.

Excel Upload

Download Excel Template

DOWNLOAD TEMPLATE

Sample Excel Template

SAMPLE

*City

HYDERABAD

+

*Excel Upload

Choose File

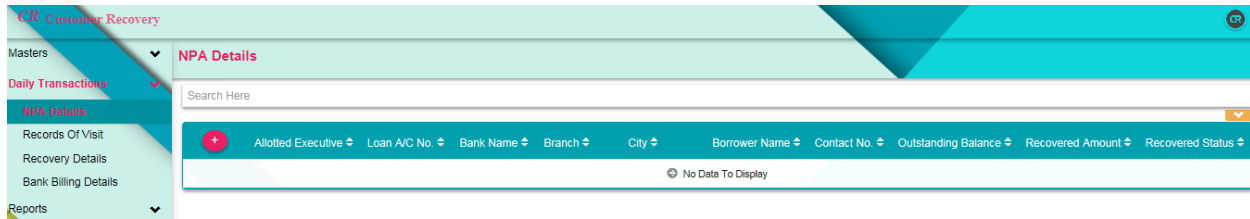
No file chosen

UPLOAD

Daily Transactions:


4.1. NPA Details:

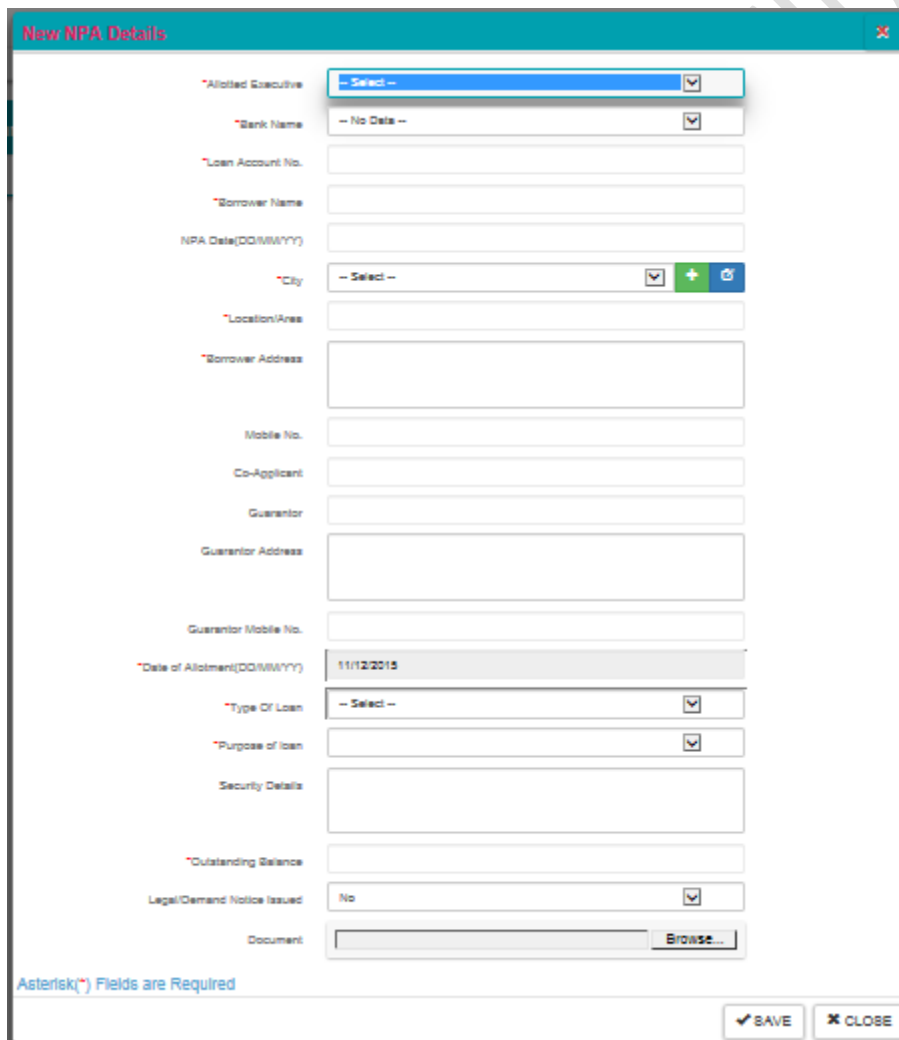
NPA Details form can be accessed by clicking on “NPA Details” submenu in “Daily Transactions” tab on page top. “NPA Details” form shows the list of Available/Created NPA Details.




The screenshot shows the 'NPA Details' form in the 'Customer Recovery' system. The left sidebar contains a menu with 'Masters', 'Daily Transactions', 'NPA Details', 'Records Of Visit', 'Recovery Details', 'Bank Billing Details', and 'Reports'. The 'NPA Details' submenu is selected. The main area displays a table with columns: Allotted Executive, Loan A/C No., Bank Name, Branch, City, Borrower Name, Contact No., Outstanding Balance, Recovered Amount, and Recovered Status. A search bar is at the top, and a message 'No Data To Display' is shown below the table.

4.1.1. Create NPA Details:

New NPA can be created by clicking on  “Create New” option.



The screenshot shows the 'New NPA Details' form. It contains various input fields for creating a new NPA record. The fields are: Allotted Executive (dropdown), Bank Name (dropdown), Loan Account No. (text), Borrower Name (text), NPA Date (DD/MM/YYYY) (text), City (dropdown), Location/Area (text), Borrower Address (text), Mobile No. (text), Co-Applicant (text), Guarantor (text), Guarantor Address (text), Guarantor Mobile No. (text), Date of Allotment (DD/MM/YYYY) (text), Type Of Loan (dropdown), Purpose of loan (dropdown), Security Details (text), Outstanding Balance (text), Legal/Demand Notice Issued (dropdown), and Document (text with a 'Browse...' button). A note at the bottom left states 'Asterisk(*) Fields are Required'. At the bottom right, there are 'SAVE' and 'CLOSE' buttons.

- Fill in the details in the fields marked with asterisk and click on save option and you will get the Confirmation message as “Successfully New NPA created”.
- In “Search Filter” section users can be searched and listed using Allotted Executive, Loan A/c No., Bank Name, Branch, City, Borrower Name, contact No., Outstanding Balance, Recovered Amount and Recovered status.
- User can click on the hide option in the saved record then view the remaining field details (fields are not mentioned in the grid columns).
- If user clicks on Close button then displayed user details form is closed.
- User can generate the individual NPA wise PDF report by clicking on  pdf icon.

Below image shows the sample format of the NPA Details

CUSTOMER RECOVERY

Kommineni Consultants Pvt. Ltd.

H.No.: 8-3-1-21, Plot No.: 24, Krishna Vihar HDFC Bank Lane,
Srinagar Colony, Hyderabad Ph : 65886859, 23744980, Fax : 23744981
E-mail : reach@kommineni.co.in, www.kommineni.co.in



(RECOVERY DEPARTMENT)

S.No. NPA DETAILS

DATE : 31/03/2016

1	Bank	: PNB
2	Branch	: Malakpet
3	Account Number	: 068900JB00000410
4	Borrower Name & Address	: M Raji D/o. M.R.S.Kurup 6-9-4/3/1/1/B Shiva Rampally National Police Academy Post Hyderabad.
5	Cell Number	: 8121751914
6	Guarantor Name & Address	:
7	Guarantor Number	:
8	Date Of Sanction	: 25/02/2016
9	Purpose Of Loan	: EL
10	Security Details	:
11	Out Standing Balance	: 102000.00
12	Legal Demand /Notice issued	: No
13	NPA Date	: 01/03/2015
14	Is Active	: Yes

- User can select number of NPA Details to view in the form using predefined record selection shown besides Page numbering. User Can Export The Data in XLS, XLSX & PDF Formats.
- This NPA Details form generates the Reports based on "Executive Wise, Bank wise, Branch wise, City wise and "from and to dates" wise.
- Created all the NPA records will displayed in the NPA details grid.

CUSTOMER RECOVERY

NPA Details

Search Here

Eexecutive

-- ALL --

Bank

-- ALL --

Branch

-- ALL --

City

-- ALL --

From Date(dd/mm/yy)















01/12/2015

To Date(dd/mm/yy)

10/12/2015


XLS

EXPORT

	Allotted Executive	Loan A/C No	Bank Name	Branch	City	Borrower Name	Contact No	Outstanding Balance	Recovered Amount	Recovered Status
 	EXECUTIVE	loanaccount3	HDFC	Banjara hills	HYDERABAD	name	9865653313	2565555.00		PENDING
 	EXECUTIVE	loan account no2	HDFC	Banjara hills	HYDERABAD	borrower		2500000.00	100000.00	PENDING
 	EXECUTIVE	executive loan1	HDFC	Banjara hills	HYDERABAD	executive borrower	9863464646	1000000.00	1000000.00	CLOSE
 	VISHAL	12333333333	RBS	Jubihills	HYDERABAD	Varun kumar		500000.00	300000.00	PENDING
 	VISHAL	123444444444	RBS	Jubihills	HYDERABAD	Kalyan chakravarthi		1500000.00	100000.00	PENDING
 	VISHAL	123455555555	RBS	Jubihills	HYDERABAD	Kiran kumar surapaneni		2500000.00	350000.00	PENDING
 	MANAGER	manager loan1	sbi	kapra	HYDERABAD	borower manager		5000000.00	11000.00	PENDING

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4.1.2. Edit NPA details:

Superadmin/admin/Manger/Executive level users can edit and update the NPA details using “Edit NPA details” option  .

Edit NPA Details

*Allotted Executive

ADINARAYANA (EXECUTIVE)

*Bank Name

UCO - - abids circle

*Loan Account No.

loan admin

*Borrower Name

borrower

NPA Date(MM/DD/YY)

03/01/2016

*City

HYDERABAD

+

*Location/Area

HYD

*Borrower Address

ADDRESS

Mobile No.

Co-Applicant

Guarantor

Guarantor Address

Guarantor Mobile No.

*Date of Allotment(MM/DD/YY)

03/28/2016

*Type Of Loan

Unsecured

*Purpose of loan

BG

Security Details

*Outstanding Balance

10000.00

Legal/Demand Notice Issued

No

Document

Choose file

No file chosen

No Document Uploaded

Asterisk(*) Fields are Required

✓ UPDATE

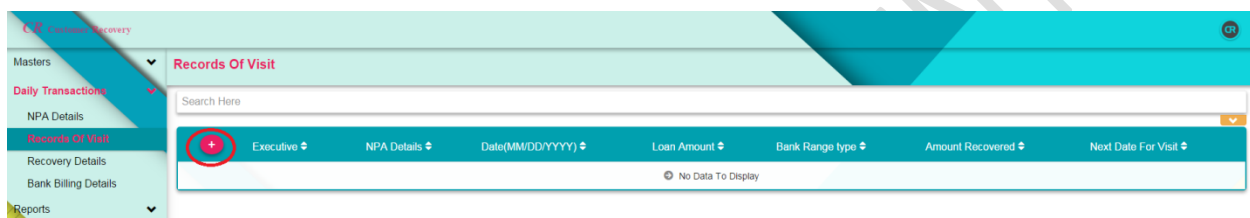
✕ CLOSE

- After Modifying the required details and clicking on the “Update” button and displays the conformation message as “Successfully NPA details updated”.
- By clicking on close option then displayed popup window is closed.


4.2. Records of visit:

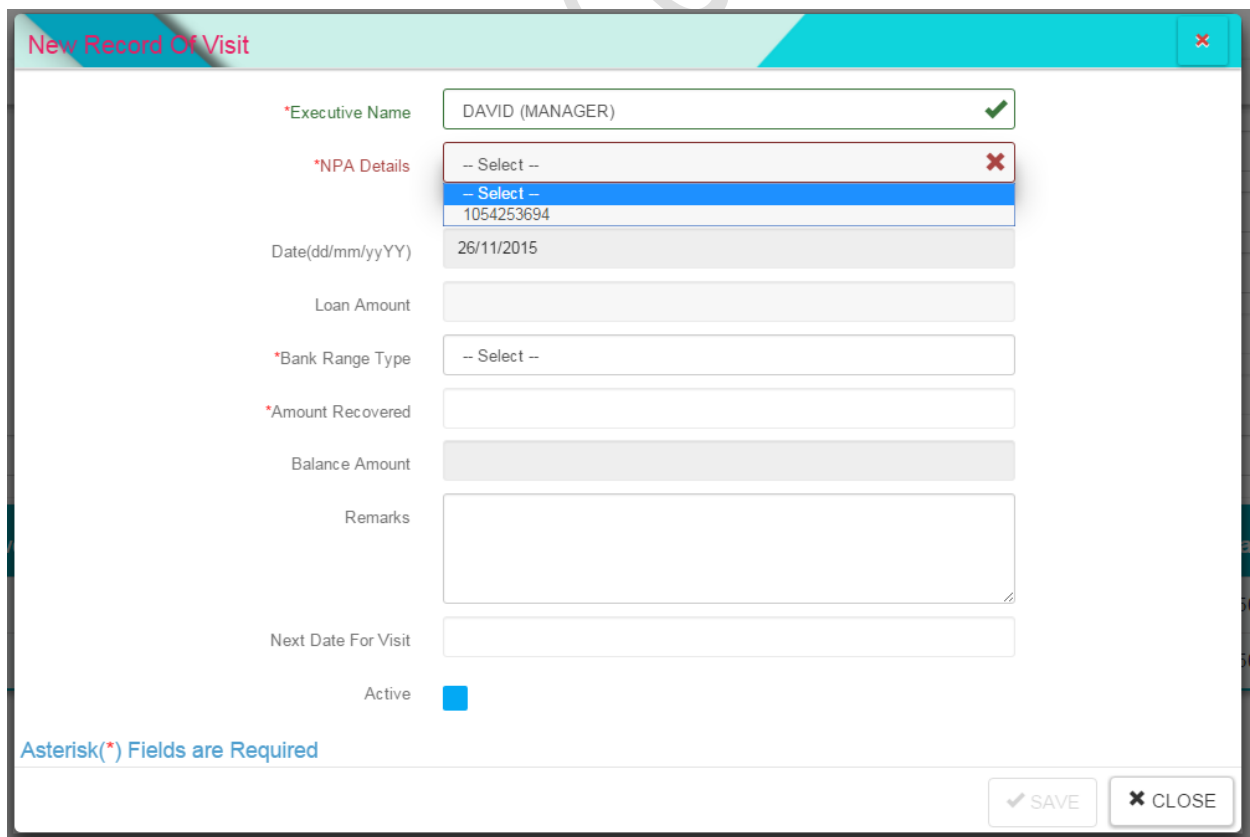
4.2.1. Create Records of visit

- “Records of visit” form can be accessed by clicking on “Records of visit” submenu in “Daily Transactions” tab on page top.



The screenshot shows the 'Records Of Visit' grid. The grid has columns: Executive, NPA Details, Date(MM/DD/YYYY), Loan Amount, Bank Range type, Amount Recovered, and Next Date For Visit. A red circle highlights the '+' icon in the Executive column, which is used to create a new record.

- This form can be accessed by clicking “Create”  option in “Records of visit” grid.



The screenshot shows the 'New Record Of Visit' form. The form contains the following fields:

- *Executive Name: DAVID (MANAGER) ✓
- *NPA Details: -- Select -- ✗
- Date(dd/mm/yyyy): 26/11/2015
- Loan Amount:
- *Bank Range Type: -- Select --
- *Amount Recovered:
- Balance Amount:
- Remarks:
- Next Date For Visit:
- Active: ☐

Asterisk(*) Fields are Required

Buttons: SAVE, CLOSE

CUSTOMER RECOVERY

- Fill in the details in the fields marked with asterisk and click on save option and you will get the Confirmation message as “Successfully New Records of visit is saved”.
- In “Search Filter” section users can be searched and listed using “Allotted Executive”, “NPA details”, “Date”, “Loan Amount” “Bank Range type”, “Amount Recovered” and “Next Date for Visit”.
- User can click on the hide option in the saved record then view the remaining field details (fields are not mentioned in the grid columns).
- If user clicks on Close button then displayed user details form is closed.
- User can select number of Records of visit Details to view in the form using predefined record selection shown besides Page numbering. User Can Export The Data in XLS, XLSX & PDF Formats.
- This Records of visit Details form generates the Reports based on “Bank wise, Branch wise and “from and to dates” wise.
- Created all the Records of visit details will displayed in the Records of visit details grid.

Records Of Visit

Search Here

Eexecutive

-- ALL --

Bank

-- ALL --

Branch



-- ALL --

From Date(DD/MM/YYYY)


To Date(DD/MM/YYYY)

XLS

EXPORT

	Executive	NPA Details	Date(MM/DD/YYYY)	Loan Amount	Bank Range type	Amount Recovered	Next Date For Visit
 	mahesh	2222222	12-11-2015	2500000.00	NORMAL	20000.00	

4.2.2. Edit Records of visit

Superadmin/admin/Manger/Executive level users can edit and update the Records of visit details using “Edit Records of visit details” option .

Edit Record Of Visit

*Executive Name

maresh (MANAGER)

*NPA Details

2222222

Date(DD/MM/YY)

11/12/2015

Loan Amount

2500000.00

*Bank Range Type

NORMAL

*Amount Recovered

20000.00

Remarks

Next Date For Visit(DD/MM/YY)

12/12/2015

Asterisk(*) Fields are Required

✓ UPDATE

✕ CLOSE

- After Modifying the required details and clicking on the “Update” button and displays the conformation message as “Successfully Records of visit updated”.
- By clicking on close option then displayed popup window is closed.

4.3. Recovery Details

4.3.1. Create Recovery Details

- “Recovery Details” form can be accessed by clicking on “Recovery Details” submenu in “Daily Transactions” tab on page top.

Customer Recovery

Masters

Daily Transactions

NPA Details

Records Of Visit

Recovery Details

Bank Billing Details


Reports

Recovery details

Search Here

BILL GENERATE BILL CHECK

	Borrower Name	A/C No.	Bank	Branch	Loan Amount	Recovered Amount	Balance Amount	Total Commission	Status	Bill Status
	Rajesh babu	1234567890	HDFC	Hyderabad	1500000.00	1500000.00	0.00	88875.00	CLOSE	PENDING

- This form can be accessed by clicking “Create”  option in “Recovery Details” grid.

CUSTOMER RECOVERY

New Recovery Bill

*Executive Name

maresh (MANAGER)

✓

*NPA Details

2222222

✓

*Bank Range Type

NORMAL

✓

*Loan Amount

2500000.00

*Previous Recovered Amount

0.00

*Recovered Amount

1000

✓

*Balance Amount

2499000

*Recovered Date(DD/MM/YY)

11/12/2015

*Recovered Amount Commission(%)

5

Service Tax(%)

Board Charges

Transport Charges

Valuation Charges

Surveyor charges

Property Identification charges

Investigation Charges

Miscellaneous Charges

*Total Commission

50

Asterisk(*) Fields are Required


✓ SAVE

✕ CLOSE


- Fill in the details in the fields marked with asterisk and click on save option and you will get the Confirmation message as “Successfully New Recovery Details is saved”.
- In “Search Filter” section users can be searched and listed using “Borrower Name”, “A/C No”, “Bank”, “Branch”, “Loan Account”, “Recovered Amount”, “Balance Amount” and “Total commission”.
- User can click on the hide option in the saved record then view the remaining field details (fields are not mentioned in the grid columns).
- If user clicks on Close button then displayed Recovery Details form is closed.
- User can select number of Recovery Details to view in the form using predefined record selection shown besides Page numbering. User Can Export The Data in XLS, XLSX & PDF Formats.
- This Recovery Details form generates the Reports based on “Bank wise, Branch wise and “from and to dates” wise.

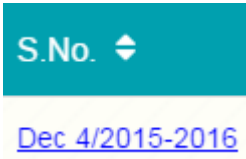
- Created all the Recovery Details will display in the Recovery Details grid.

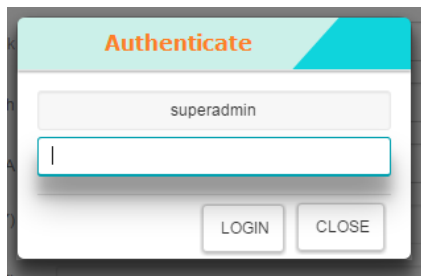
4.3.2. Edit Recovery Details

Superadmin/admin/Manger/Executive level users can edit and update the Recovery Details using “Edit Recovery Details” option .

- Any User can edit and update the Recovery Details using “Edit Recovery Details”. User can view and edit the Recovery Details including Active option of Recovery Details using this form.
- After editing click the “Update” button. To go back to “Recovery Details” form without any editing or saving click “Close” button.
- Authentication for Edit Recovery bills:** If user needs to edit any records he/she should provide login password.
- Process of Edit Recovery Bills:**

User can edit the recovery details by clicking on  the icon, then pop up will appear showing that all the recovery bills, If user needs to edit any record in popup then he should click


on the serial no of recovery bill then authentication popup will appear,



User need to provide the login password, after successful authentication edit recovery bill form will appear. Below form shows the Edit recovery Details Bill.

CUSTOMER RECOVERY

Edit Recovery Bill

*Executive Name

ADMIN (MANAGER)

*NPA Details

1054253694

*Bank Range Type

NORMAL

*Recovered Amount

500000.00

*Recovered Date

26/11/2015

*Recovered Amount Commission(%)

1

Service Tax(%)

14.5

Board Charges

0.00

Transport Charges

0.00

Valuation Charges

0.00

Surveyor charges

0.00

Property Identification charges

0.00

Investigation Charges

0.00

Miscellaneous Charges

0.00

*Total Commission

5725.00


Active

☒

Asterisk(*) Fields are Required

✓ SAVE

✗ CLOSE

- By clicking the down arrow  user will search and export the required details

Recovery details 25

Search Here

Bank

-- ALL --

Branch

-- ALL --

NPA

-- ALL --

From Date(MMDD/YY)

To Date(MMDD/YY)

XLS

EXPORT

BILL GENERATE

BILL CHECK

Borrower Name	A/C No.	Bank	Branch	Loan Amount	Recovered Amount	Balance Amount	Total Commission	Status	Bill Status
k chandra sekhar	14410610015100	UCO	abids circle	587474.00	60000.00	527474.00	3362.50	PENDING	PENDING

Note: user will select the NPA by entering the Account no and Borrower name.

4.3.3. Bill Generate:

Superadmin/admin/Manger/Executive level users can generate a new “Bill” using the form shown below.

BILL GENERATE

- This form can be accessed by clicking “Bill Generate” button in “Recovery Details” form. To create new Bill Generate enter all the details and click on “Save”. New Bill Details will create successfully.
- By using this form user can create the new Bills with following details like “Bank Name”, “NPA Details” and “Recovery Bills”.
- Successful creation of bill pdf will be generated showing the bill details.

Bills Generate form is shown below.

The screenshot shows a web form titled "Bill Generate" with a teal header bar. The form contains several sections for data entry:

- *Bank Name:** A text input field containing "RBS -- Jublihillis" with a green checkmark icon on the right.
- *NPA Details:** Two columns of selection lists.
 - Non-selected NPA(s):** Labeled "Showing all 1", it has a "Filter" box and a list containing the number "89562346454646".
 - Selected NPA(s):** Labeled "Showing all 1", it has a "Filter" box and a list containing the number "564656488".
- *Recovery Bills:** Two columns of selection lists.
 - Non-selected Recovery Bill(s):** Labeled "Showing all 1", it has a "Filter" box and a list containing "564656488 - 100000.00".
 - Selected Recovery Bill(s):** Labeled "Empty list", it has a "Filter" box and an empty list.

At the bottom left, a note states "Asterisk(*) Fields are Required". At the bottom right, there are two buttons: "✓ SAVE" and "✗ CLOSE".

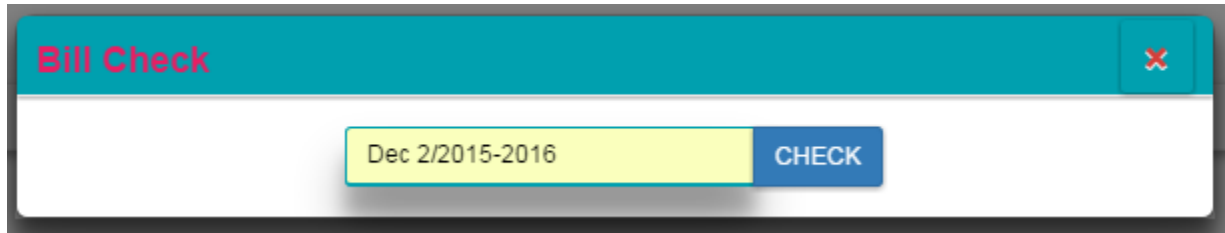
CUSTOMER RECOVERY

- If user wants to regenerate the bill once again then user can use the “Bill check” option

BILL CHECK

, by providing the serial number in bill check, and then recovery bill copy will be generated based on given serial no.

Below image shows the Bill check popup.

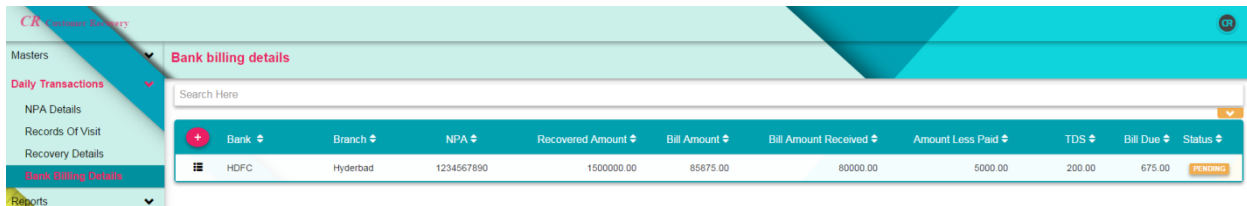


The image shows a 'Bill Check' popup window. It has a teal header bar with the text 'Bill Check' in red and a red 'X' icon in the top right corner. Below the header is a white input field containing the text 'Dec 2/2015-2016'. To the right of the input field is a blue button with the text 'CHECK' in white. A large, diagonal watermark reading 'ATHARVANA CONFIDENTIAL' is visible across the lower half of the page.


4.4. Bank Billing Details

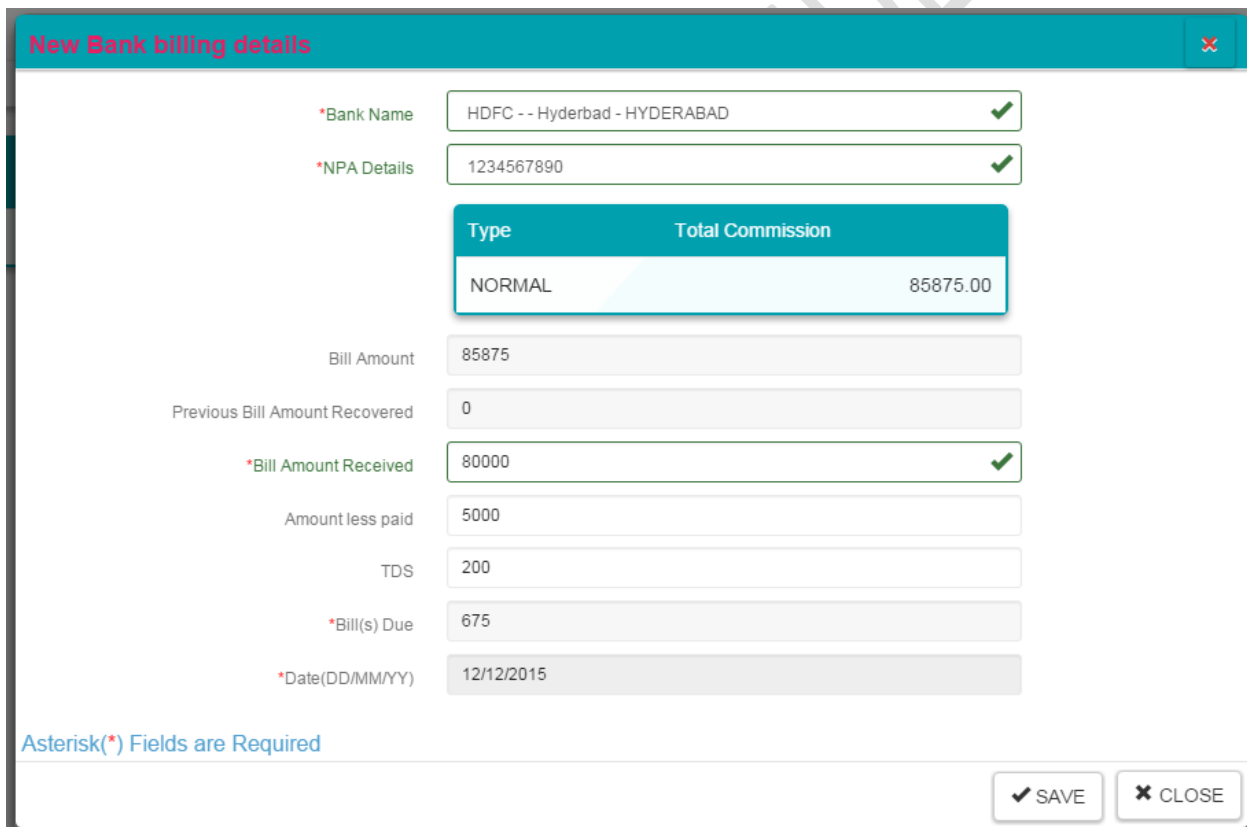
4.4.1. Create Bank Billing Details

“Bank Billing Details” form can be accessed by clicking on “Bank Billing Details” submenu in “Daily Transactions” tab on page top



Bank	Branch	NPA	Recovered Amount	Bill Amount	Bill Amount Received	Amount Less Paid	TDS	Bill Due	Status
HDFC	Hyderbad	1234567890	150000.00	85875.00	80000.00	5000.00	200.00	675.00	PENDING

- This form can be accessed by clicking “Create”  option in “Bank Billing details” grid.



New Bank billing details

*Bank Name: ✓

*NPA Details: ✓

Type	Total Commission
NORMAL	85875.00

Bill Amount:

Previous Bill Amount Recovered:

*Bill Amount Received: ✓

Amount less paid:

TDS:

*Bill(s) Due:

*Date(DD/MM/YY):

Asterisk(*) Fields are Required

- Fill in the details in the fields marked with asterisk and click on save option and you will get the Confirmation message as “Successfully New Bank Billing Details is saved”.
- In “Search Filter” section users can be searched and listed “Bank name”, “Branch”, “NPA”, “Recovered amount”, “Bill amount”, “Bill amount received”, “Amount less paid”, “TDS” and “Bills Due”.

CUSTOMER RECOVERY

- User can click on the hide option in the saved record then view the remaining field details (fields are not mentioned in the grid columns).
- If user clicks on Close button then displayed Bank Billing details form is closed.
- User can select number of Bank Billing details to view in the form using predefined record selection shown besides Page numbering. User Can Export The Data in XLS, XLSX & PDF Formats.
- This Bank Billing details form generates the Reports based on Bank wise, Branch wise, NPA, Status and “from and to dates” wise.
- Created all the Bank Billing details will display in the Bank Billing details grid.

The screenshot shows the 'Bank billing details' form. It includes a sidebar with navigation options: Masters, Daily Transactions, NPA Details, Records Of Visit, Recovery Details, Bank Billing Details (selected), and Reports. The main form has a search bar and several filter fields: Bank (dropdown), Branch (dropdown), NPA (dropdown), Status (dropdown), From Date (DDMMYY), and To Date (DDMMYY). Below the filters is an 'EXPORT' button. At the bottom, there is a table with the following data:

Bank	Branch	NPA	Recovered Amount	Bill Amount	Bill Amount Received	Amount Less Paid	TDS	Bill Due	Status
HDFC	Hyderabad	1234567890	1500000.00	85675.00	80000.00	5000.00	200.00	675.00	PENDING

Note: There is no edit feature for Bank Billing details page

- By clicking the down arrow  user will search and export the required details

The screenshot shows the 'Bank billing details' form with the same sidebar and filters as the previous image. The 'EXPORT' button is highlighted. Below the filters is a table with the following data:

Bank	Branch	NPA	Recovered Amount	Bill Amount	Bill Amount Received	Amount Less Paid	TDS	Bill Due	Status
UCO	abids circle	14410610015100	60000.00	3362.50	2100.00	810.00	73.00	379.50	PENDING

Note: user will select the NPA by entering the Account no and Borrower name.

Reports:

5. Daily Report

Daily Report Displays the report based on “Date wise”, “Executive wise”, “Bank wise”, “Branch wise” and “city wise”.

CR Expense Recovery

01

Masters

Daily Transactions

Reports

Daily report

Excel Upload

Daily Report

Search Here

Executive

-- ALL --

Bank

-- ALL --

Branch

-- No Data --

City

-- ALL --

Date(DDMMYY)

12/12/2015

Status

-- All --

XLS

EXPORT

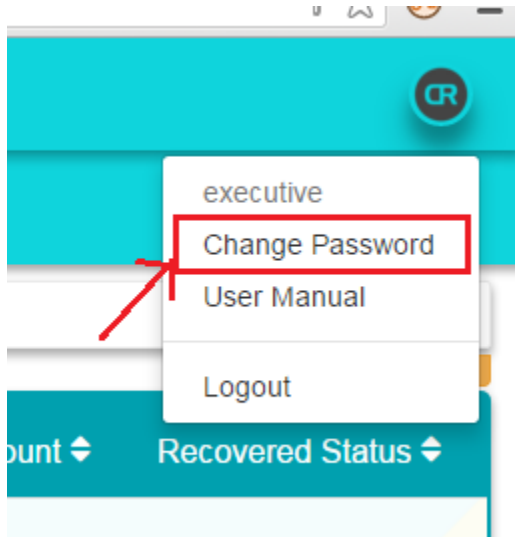
Name of The Executive	Target	No. of A/C's Allotted	No. Of New Account	No. of A/C's Attempted Today	No. of A/C's Attempted Till Date	Amount Recovered		Bank	Branch	Account no.	Customer
						Today	Tillday				
mahesh	1200000.00	2	0	0	0	1500000.00	1500000.00	HDFC	Hyderabad	1234567890	Rajesh
				1	2	25000.00	25000.00		Hyderabad	2222222	rajesh

6. Executive Report

Executive Report Displays based on “Executive”, “Bank”, “Branch” and “NPA”.

Executive Name	Bank And Branch	Borrower Name	Account Number	Loan Amount	Total Recovered NPA Amount	Executive Recovered Amount
exe exe	UCO - S D ROAD	hyde borrower loan	hydexeloan	10000	3000	1000
exe exe	UCO - S D ROAD	hyde borrower loan	hydexeloan	10000	3000	2000

7. Change Password

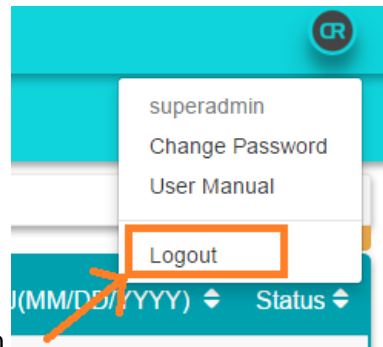


- Change password link will appear by clicking on the “CR” logo now click on the Change Password link then Change password popup is displayed with following screen.

A screenshot of a 'Change Password' popup form. The form has a teal header with the text 'Change Password'. Below the header, there are four input fields: 'User Name' (containing 'executive'), '*Old Password', '*New Password', and '*Retype New Password'. The asterisk (*) indicates required fields. At the bottom left, there is a note: 'Asterisk(*) Fields are Required'. At the bottom right, there are two buttons: '✓ SAVE' and '✗ CLOSE'.

- Enter the current old password and fill the “New Password” as well as “Retype New Password” and click on save button, then new password will saved successfully.
- User can login with new password.

8. Logout:



Click on logout option

to end the Customer Recovery application.

THANK YOU
