



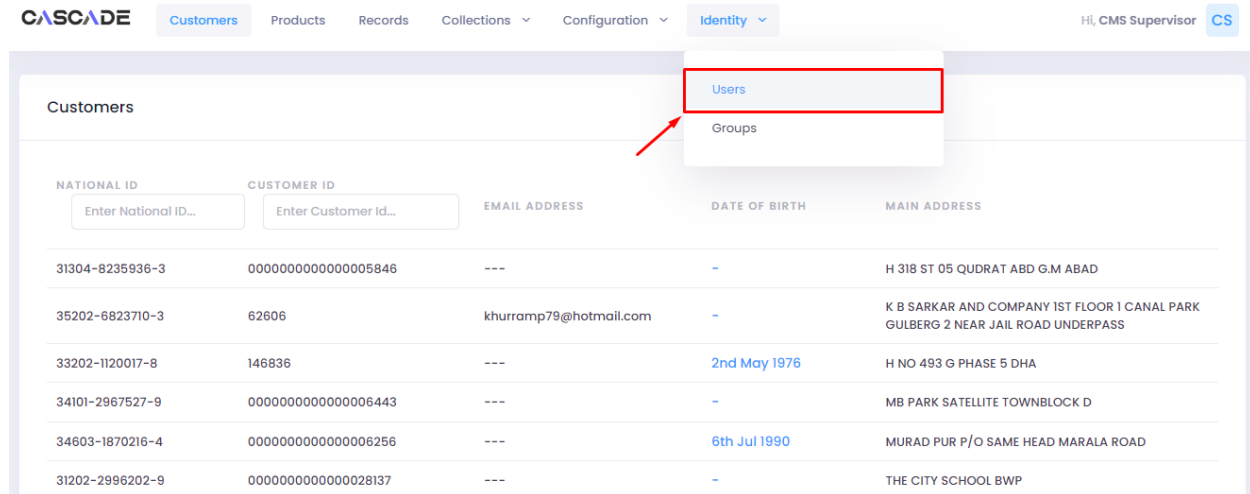
Administration Guide

Contents

Users	3
Forgotten Password	9
Groups.....	12
Fields	19
Entities	26
Records	31

Users Maker

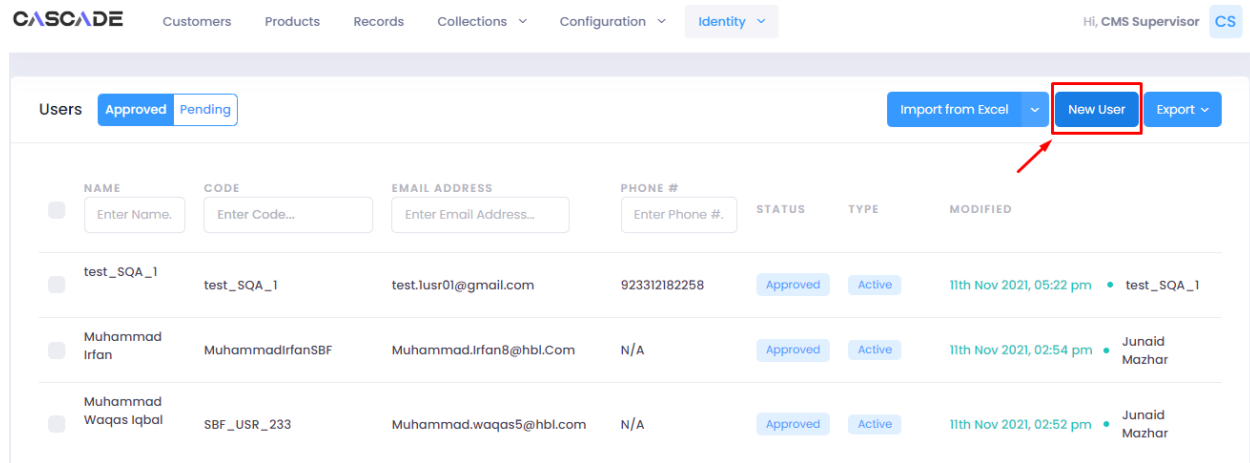
1. Click on 'users' under the 'identity' tab.



The screenshot shows the CASCADE application interface. The top navigation bar includes 'Customers', 'Products', 'Records', 'Collections', 'Configuration', and 'Identity'. The 'Identity' tab is selected, and a dropdown menu is open, showing 'Users' and 'Groups'. A red box highlights the 'Users' option, and a red arrow points to it. Below the dropdown, the 'Customers' section is visible, showing a table with columns: NATIONAL ID, CUSTOMER ID, EMAIL ADDRESS, DATE OF BIRTH, and MAIN ADDRESS. The table contains several rows of customer data.

NATIONAL ID	CUSTOMER ID	EMAIL ADDRESS	DATE OF BIRTH	MAIN ADDRESS
31304-8235936-3	0000000000000005846	---	-	H 318 ST 05 QUDRAT ABD G.M ABAD
35202-6823710-3	62606	khurramp79@hotmail.com	-	K B SARKAR AND COMPANY 1ST FLOOR 1 CANAL PARK GULBERG 2 NEAR JAIL ROAD UNDERPASS
33202-1120017-8	146836	---	2nd May 1976	H NO 493 G PHASE 5 DHA
34101-2967527-9	000000000000006443	---	-	MB PARK SATELLITE TOWNBLOCK D
34603-1870216-4	000000000000006256	---	6th Jul 1990	MURAD PUR P/O SAME HEAD MARALA ROAD
31202-2996202-9	000000000000028137	---	-	THE CITY SCHOOL BWP

2. Click on 'new user' to create a new user.

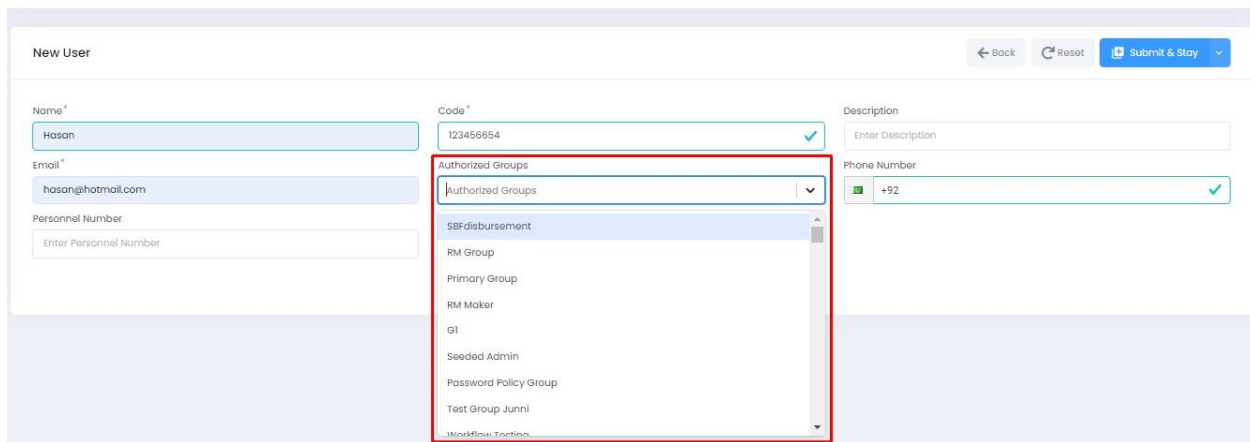


The screenshot shows the CASCADE application interface for the 'Users' section. The top navigation bar includes 'Customers', 'Products', 'Records', 'Collections', 'Configuration', and 'Identity'. The 'Identity' tab is selected, and the 'Users' sub-tab is active. A red box highlights the 'New User' button, and a red arrow points to it. Below the button, the 'Users' section is visible, showing a table with columns: NAME, CODE, EMAIL ADDRESS, PHONE #, STATUS, TYPE, and MODIFIED. The table contains several rows of user data.

NAME	CODE	EMAIL ADDRESS	PHONE #	STATUS	TYPE	MODIFIED
test_SQA_1	test_SQA_1	test.lusr01@gmail.com	923312182258	Approved	Active	11th Nov 2021, 05:22 pm • test_SQA_1
Muhammad Irfan	MuhammadIrfanSBF	Muhammad.Irfan8@hbl.Com	N/A	Approved	Active	11th Nov 2021, 02:54 pm • Junaid Mazhar
Muhammad Waqas Iqbal	SBF_USR_233	Muhammad.waqas5@hbl.com	N/A	Approved	Active	11th Nov 2021, 02:52 pm • Junaid Mazhar

3. Fill all the required fields, then select groups under 'authorized groups' from a drop down menu.

Note: With authorized groups you can assign different rights to a user which can include modules, tabs, etc.

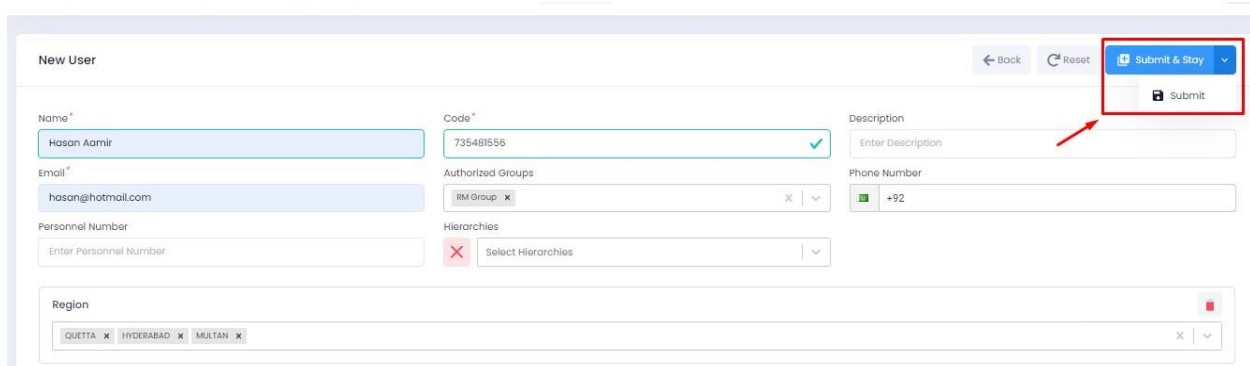


The screenshot shows the 'New User' form with the following fields and values:

- Name: Hasan
- Email: hasan@hotmail.com
- Personnel Number: (empty)
- Code: 12345654
- Authorized Groups: (dropdown menu open, showing options: SBFdisbursement, RM Group, Primary Group, RM Maker, GI, Seeded Admin, Password Policy Group, Test Group Junni, Workflow: Testflow)
- Description: (empty)
- Phone Number: +92

The 'Submit & Stay' button is highlighted in the top right corner.

4. Once you have filled all the fields, click on 'submit & stay' to save and stay on the page, or click on 'submit' to submit and leave the page.



The screenshot shows the 'New User' form with the following fields and values:

- Name: Hasan Amir
- Email: hasan@hotmail.com
- Personnel Number: (empty)
- Code: 735481556
- Authorized Groups: RM Group
- Hierarchies: (empty)
- Description: (empty)
- Phone Number: +92
- Region: QUETTA, HYDERABAD, MULTAN

The 'Submit & Stay' button is highlighted in the top right corner, and a red arrow points to it.

5. Your newly created user will now show under the 'pending' tab.

The screenshot shows the Cascade Identity Users page. The 'Identity' dropdown is selected. The 'Users' section has tabs for 'Approved' and 'Pending'. The 'Pending' tab is active. A table lists users with columns: NAME, CODE, EMAIL ADDRESS, PHONE #, STATUS, ACTION PERFORMED, and UPDATED. The first user, Hasan, is highlighted with a red box. His status is 'Draft'.

NAME	CODE	EMAIL ADDRESS	PHONE #	STATUS	ACTION PERFORMED	UPDATED
Hasan	6598423	guidetest017@gmail.com	N/A	Draft	Added	11th Nov 2021, 05:28 pm
Sarosh Amin	IT	sarosh.amin@unikrew.com	N/A	Awaiting Approval	Edited	7th Oct 2021, 10:11 am
userTesting_4	userTesting4	testinguser2@gmail.com	N/A	Awaiting Approval	Added	5th Oct 2021, 09:05 am
userTesting5	userTesting5	myuser5@gmail.com	N/A	Awaiting Approval	Added	5th Oct 2021, 09:05 am
userTesting7	userTesting7	myuser7@gmail.com	N/A	Awaiting Approval	Added	5th Oct 2021, 09:05 am

6. If you want to make any changes to the user, you can click on 'edit' to do so. You can also duplicate the user by clicking on 'clone item' or delete it by clicking on 'delete item'.

The screenshot shows the Cascade Identity Users page. The 'Identity' dropdown is selected. The 'Users' section has tabs for 'Approved' and 'Pending'. The 'Pending' tab is active. A table lists users. For the user 'Hasan Aamir', a red box highlights the 'Edit Item', 'Clone Item', and 'Delete Item' buttons.

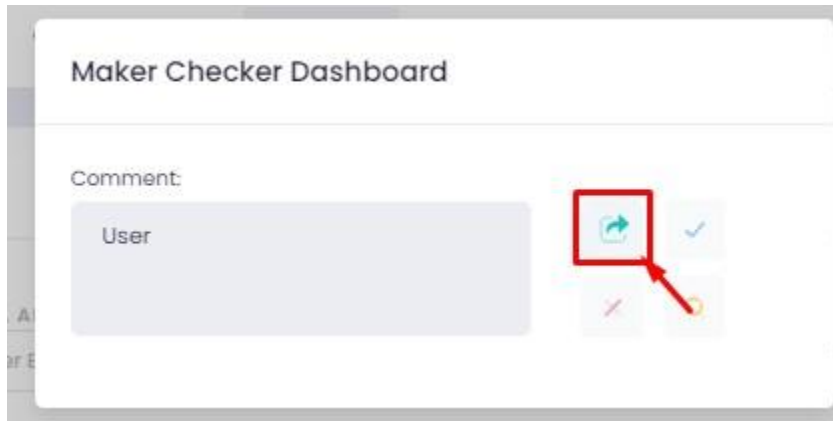
NAME	CODE	EMAIL ADDRESS	PHONE #	STATUS	ACTION PERFORMED	UPDATED
Hasan Aamir	735481556	hasan@hotmail.com	N/A	Draft	Added	5th Oct 2021, 01:02 pm
userTesting_4	userTesting4	testinguser2@gmail.com	N/A	Awaiting Approval	Added	5th Oct 2021, 09:05 am
userTesting5	userTesting5	myuser5@gmail.com	N/A	Awaiting Approval	Added	5th Oct 2021, 09:05 am

7. After you are done with making all changes, select the user by ticking the check box then click on the 'maker checker action' button.

The screenshot shows the Cascade Identity Users page. The 'Identity' dropdown is selected. The 'Users' section has tabs for 'Approved' and 'Pending'. The 'Pending' tab is active. A table lists users. The first user, Hasan, has his checkbox selected. A red box highlights the 'Maker Checker Action' button in the bottom right corner.

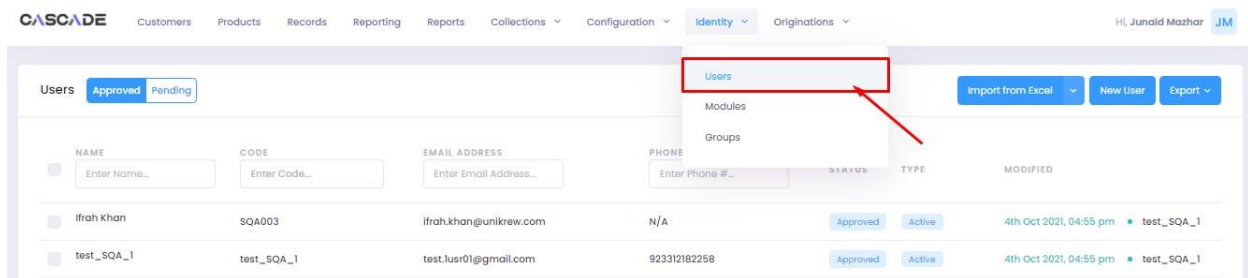
NAME	CODE	EMAIL ADDRESS	PHONE #	STATUS	ACTION PERFORMED	UPDATED
<input checked="" type="checkbox"/> Hasan	6598423	guidetest017@gmail.com	N/A	Draft	Added	11th Nov 2021, 05:28 pm
<input type="checkbox"/> Sarosh Amin	IT	sarosh.amin@unikrew.com	N/A	Awaiting Approval	Edited	7th Oct 2021, 10:11 am
<input type="checkbox"/> userTesting_4	userTesting4	testinguser2@gmail.com	N/A	Awaiting Approval	Added	5th Oct 2021, 09:05 am
<input type="checkbox"/> userTesting5	userTesting5	myuser5@gmail.com	N/A	Awaiting Approval	Added	5th Oct 2021, 09:05 am
<input type="checkbox"/> userTesting7	userTesting7	myuser7@gmail.com	N/A	Awaiting Approval	Added	5th Oct 2021, 09:05 am
<input type="checkbox"/> userTesting2	userTesting2	myuser2@gmail.com	N/A	Awaiting Approval	Added	5th Oct 2021, 09:05 am

8. Leave comments then click on 'send for approval'.

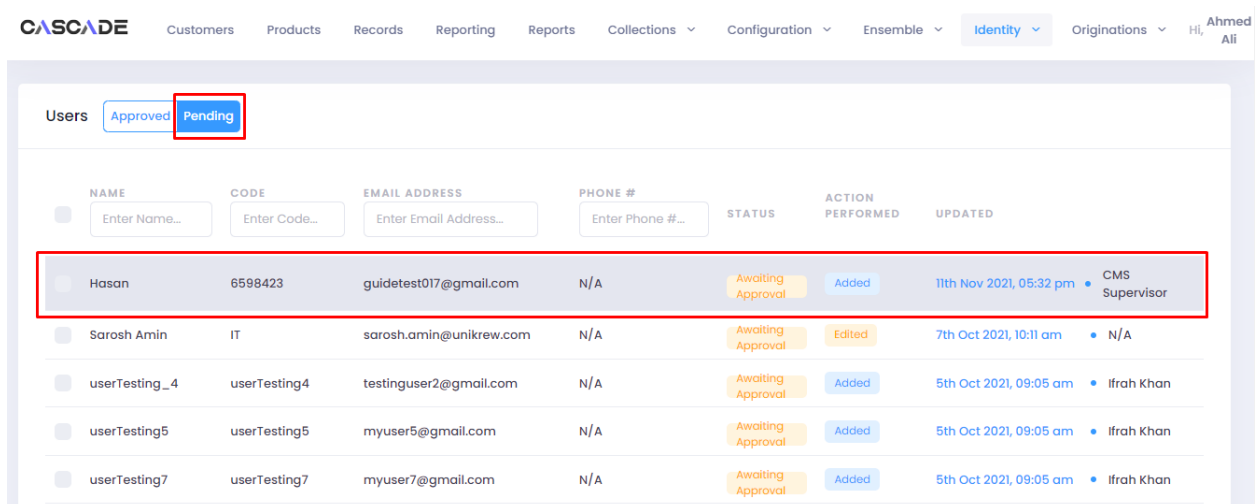


Checker

1. From the checker account, click on the 'identity' tab then on 'Users'.



2. Then click on 'pending'. Here you will see the users that require approval including the one that was just created.




3. Select a user by ticking the check box, then click on the 'maker checker action' button.

CASCADE Customers Products Records Reporting Reports Collections Configuration Ensemble Identity Originations Hi, Ahmed Ali

Users Approved Pending

	NAME	CODE	EMAIL ADDRESS	PHONE #	STATUS	ACTION PERFORMED	UPDATED	
	Enter Name...	Enter Code...	Enter Email Address...	Enter Phone #...				
<input checked="" type="checkbox"/>	Hasan	6598423	guidetest017@gmail.com	N/A	Awaiting Approval	Added	11th Nov 2021, 05:32 pm	CMS Supervisor
<input type="checkbox"/>	Sarosh Amin	IT	sarosh.amin@unikrew.com	N/A	Awaiting Approval	Edited	7th Oct 2021, 10:11 am	N/A
<input type="checkbox"/>	userTesting_4	userTesting4	testinguser2@gmail.com	N/A	Awaiting Approval	Added	5th Oct 2021, 09:05 am	Ifrah Khan
<input type="checkbox"/>	userTesting5	userTesting5	myuser5@gmail.com	N/A	Awaiting Approval	Added	5th Oct 2021, 09:05 am	
<input type="checkbox"/>	userTesting7	userTesting7	myuser7@gmail.com	N/A	Awaiting Approval	Added	5th Oct 2021, 09:05 am	Ifrah Khan





Maker Checker Action 

4. Leave a comment, then click on 'approve' to approve the user. You can also click on 'reject' to reject the user or click on 'send for review' to send it to a third person for further review.

Maker Checker Dashboard

Comment:

Approved



asan@hotmail.com N/A Awaiting

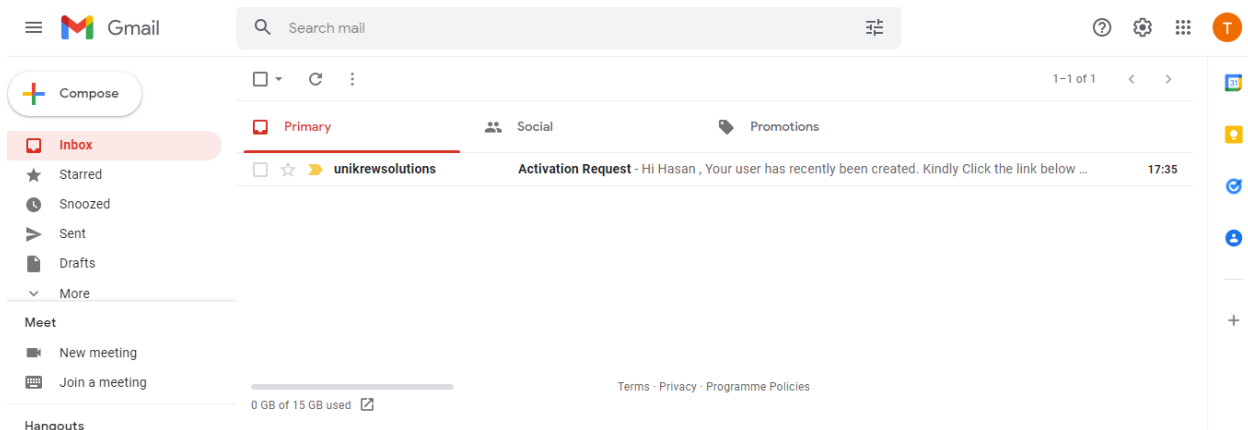
5. After the approval, the newly created user will now show as approved under the 'approved' tab. An email will also be sent to the email address of the new user entered during the user creation process.

CASCADE Customers Products Records Collections Configuration Identity Hi, CMS Supervisor CS

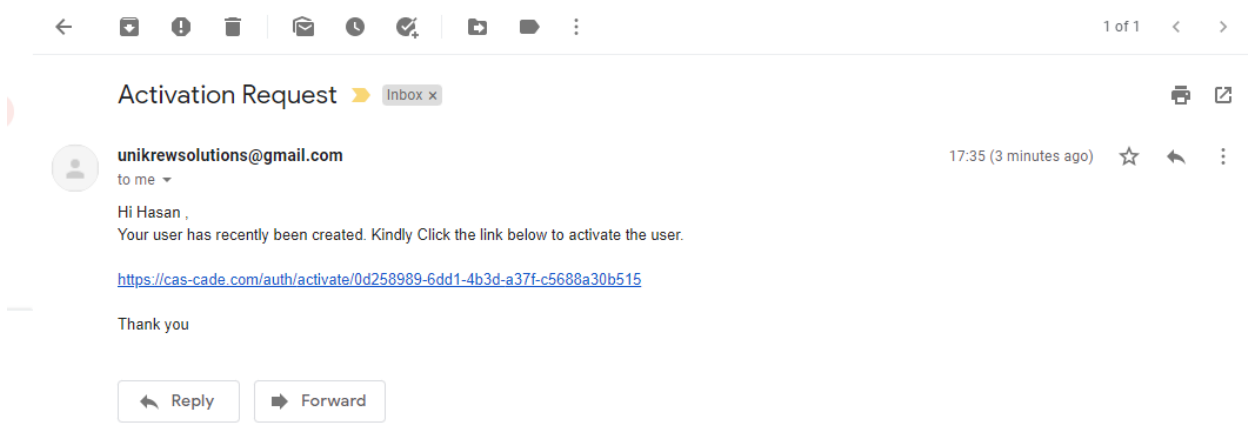
Users **Approved** Pending Import from Excel New User Export

	NAME	CODE	EMAIL ADDRESS	PHONE #	STATUS	TYPE	MODIFIED	
	Enter Name...	Enter Code...	Enter Email Address...	Enter Phone #...				
<input type="checkbox"/>	Hasan	6598423	guidetest017@gmail.com	N/A	Approved	Awaiting Activation	11th Nov 2021, 05:35 pm	Ahmed Ali
<input type="checkbox"/>	test_SQA_1	test_SQA_1	test.lusr01@gmail.com	923312182258	Approved	Active	11th Nov 2021, 05:22 pm	test_SQA_1
<input type="checkbox"/>	Muhammad Irfan	MuhammadIrfanSBF	Muhammad.Irfan8@hbl.Com	N/A	Approved	Active	11th Nov 2021, 02:54 pm	Junaid Mazhar
<input type="checkbox"/>	Muhammad Waqas Iqbal	SBF_USR_233	Muhammad.waqas5@hbl.com	N/A	Approved	Active	11th Nov 2021, 02:52 pm	Junaid Mazhar

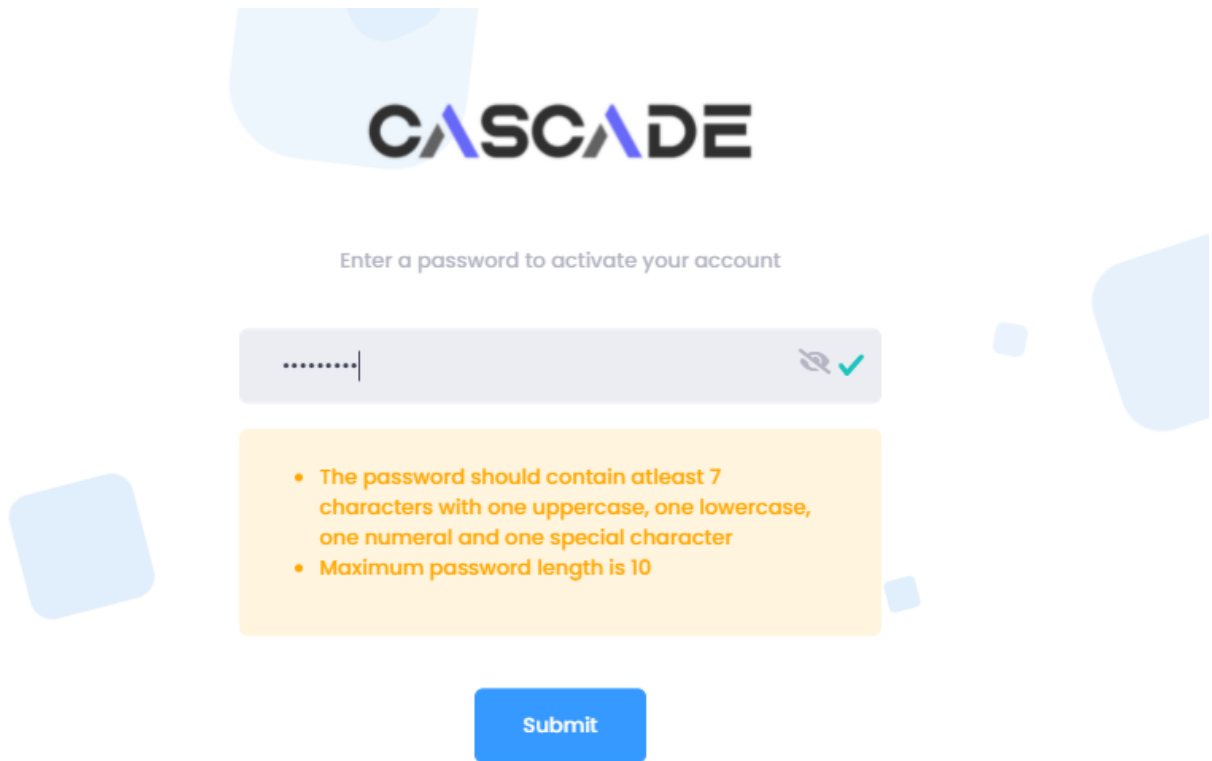
6. Click on the email to activate the new user account.



7. Then click on the link to activate the account.



8. The user will be prompted to create a new password to activate the account. Enter the password then click on submit.



The screenshot shows the CASCADE account activation interface. At the top is the CASCADE logo. Below it is the instruction "Enter a password to activate your account". There is a password input field with a green checkmark icon on the right. Below the input field is a yellow box containing two bullet points: "The password should contain atleast 7 characters with one uppercase, one lowercase, one numeral and one special character" and "Maximum password length is 10". At the bottom is a blue "Submit" button.

CASCADE

Enter a password to activate your account

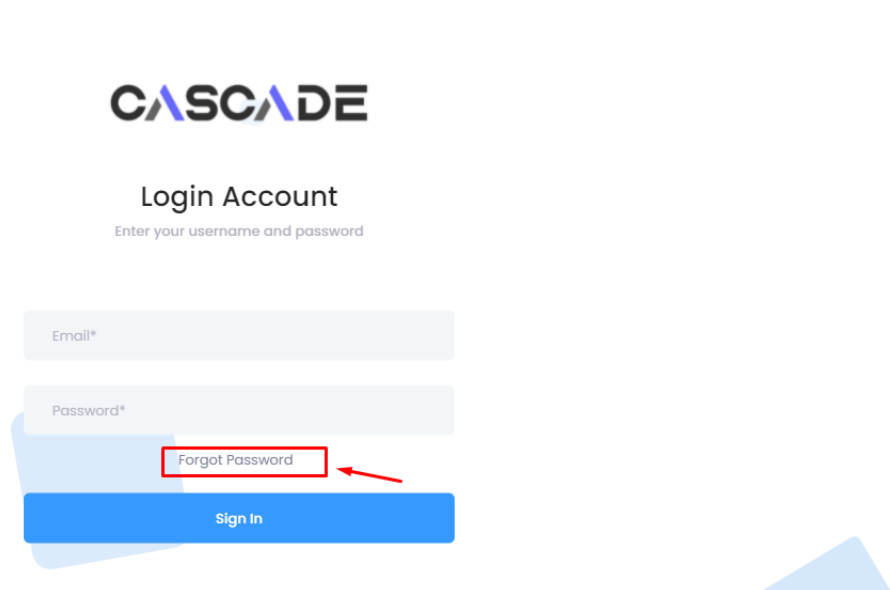
.....

- The password should contain atleast 7 characters with one uppercase, one lowercase, one numeral and one special character
- Maximum password length is 10

Submit

Forgotten Password

1. In case of a forgotten password, click on the 'forgot password' button on the login page.



The screenshot shows the CASCADE login page. At the top is the CASCADE logo. Below it is the title "Login Account" and the instruction "Enter your username and password". There are two input fields: "Email*" and "Password*". Below the "Password*" field is a "Forgot Password" button, which is highlighted with a red rectangle and a red arrow. At the bottom is a blue "Sign In" button.

CASCADE

Login Account

Enter your username and password

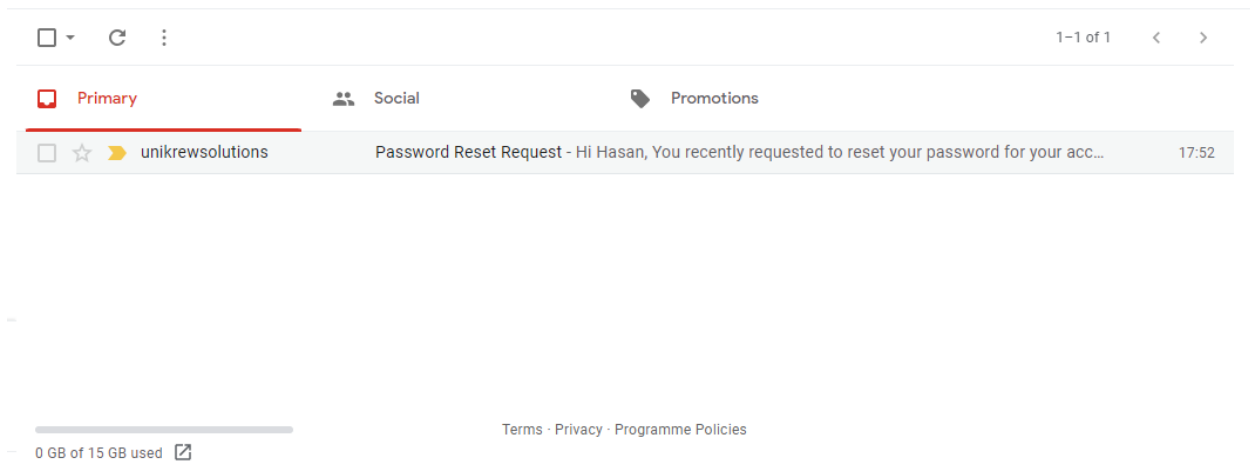
Email*

Password*

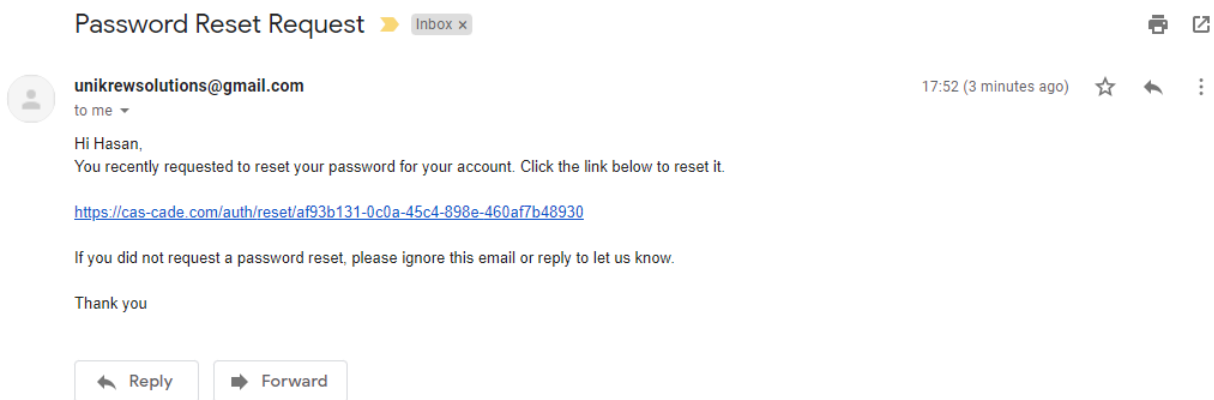
Forgot Password

Sign In

2. Then email will be sent to your registered email address, click on that email.



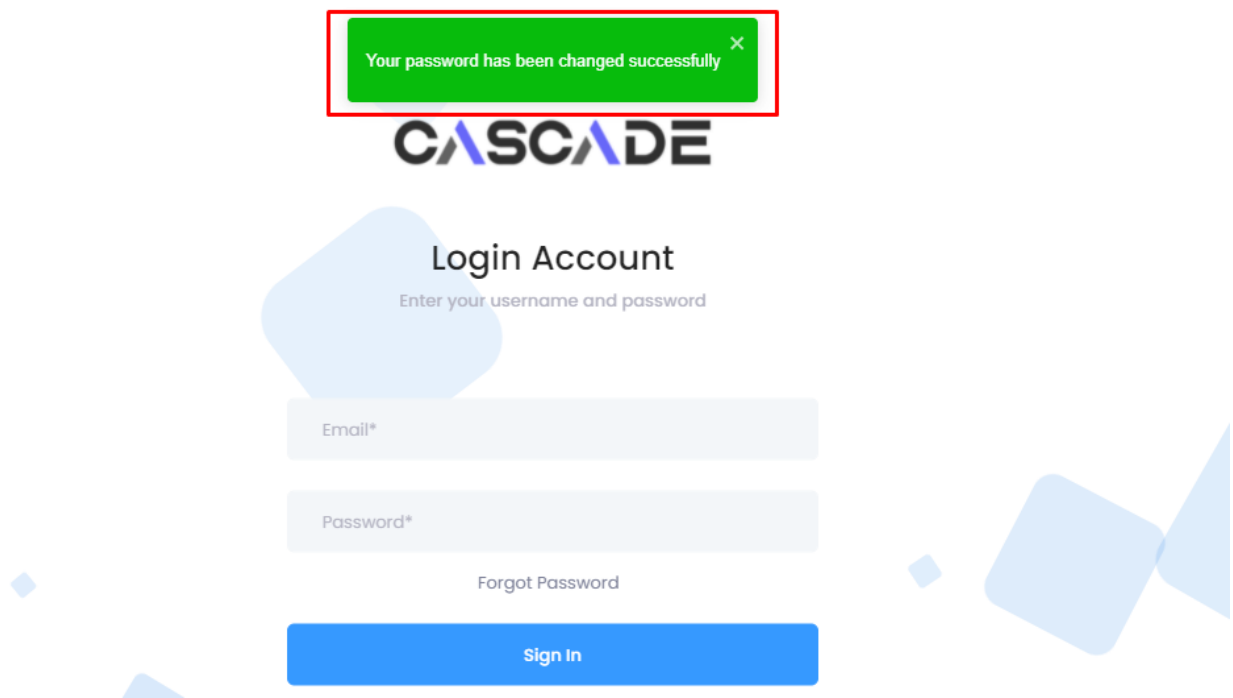
3. Click the link in the email.



4. Enter a new password then click on submit.

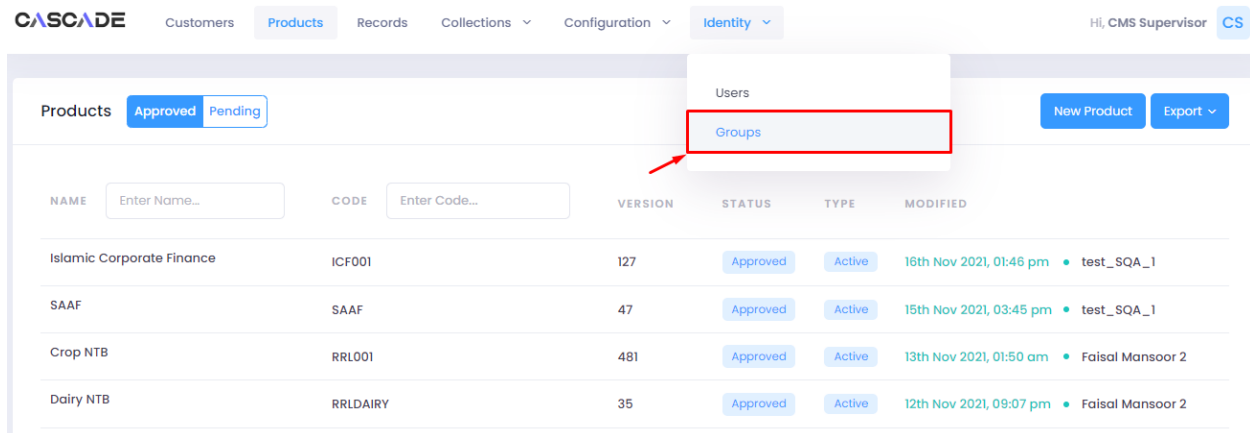
A screenshot of a password reset form for 'CASCADE'. The form has a title 'Please enter a new password'. Below the title is a text input field labeled 'Password*' with a red error icon. Below the input field, there is a red text label 'Required Field'. Below that, there is a yellow box containing two bullet points: '• The password should contain atleast 7 characters with one uppercase, one lowercase, one numeral and one special character' and '• Maximum password length is 10'. At the bottom of the form is a blue 'Submit' button.

5. You will then receive a notification saying that your password has been changed successfully.

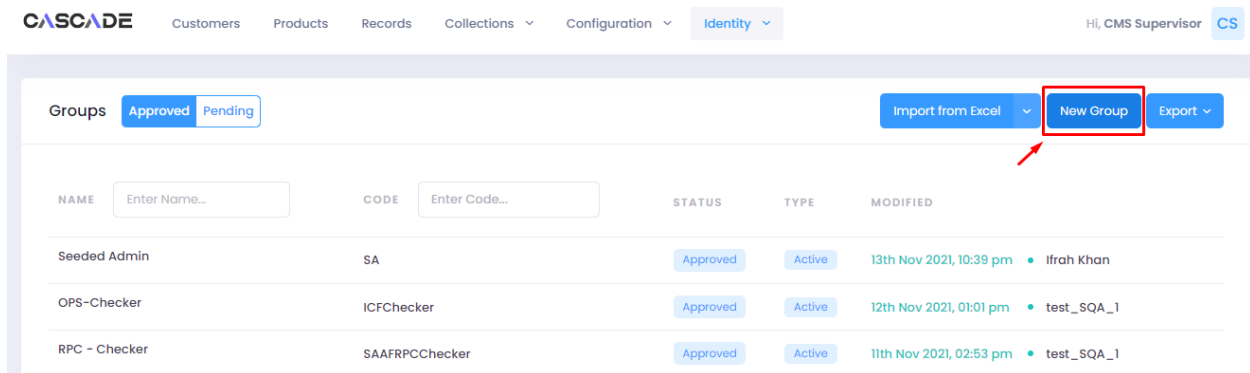


Groups Maker

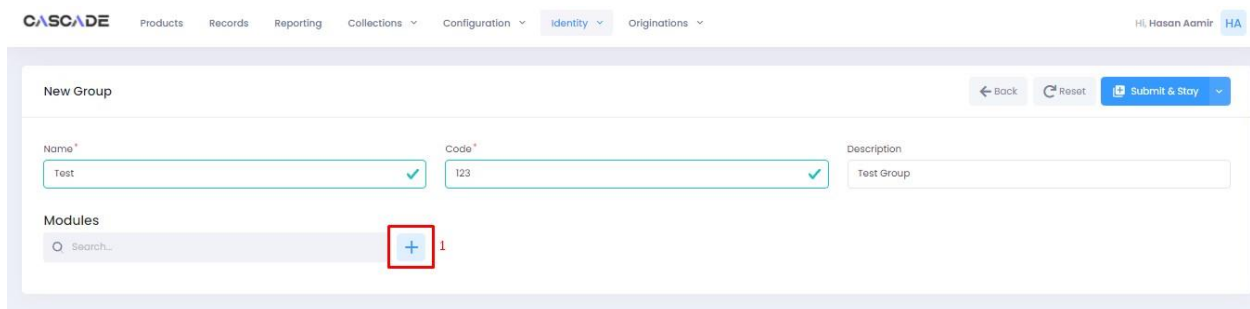
1. Click on the 'groups' tab.



2. Click on 'new group' to create a new group.



4. Fill all the required fields, then click on the 'add modules' (1) button to select modules from a drop down menu.



5. After you select a module, you will further be able to select the rights to assign relevant to the selected module.

The screenshot shows the 'New Group' form in the Cascade application. The form has a header with the Cascade logo and navigation links: Customers, Products, Records, Collections, Configuration, and Identity. The user is logged in as 'Hi, CMS Supervisor' with a 'CS' profile. The form contains fields for 'Name' (Test), 'Code' (23124455), and 'Description' (Test Group). The 'Modules' section has a search bar and a dropdown menu. The dropdown menu is open, showing a list of modules: Configuration, Jobs, Ensemble, Reporting, Originations, Enquiry, and Assignment / Reassignment. The 'Jobs' module is highlighted. The footer shows '2021 © Unikrew Solutions' and links for 'About', 'Team', and 'Contact'.

The screenshot shows the 'New Group' form in the Cascade application, with the 'Jobs' and 'Customers' modules selected. The form has a header with the Cascade logo and navigation links: Customers, Products, Records, Collections, Configuration, and Identity. The user is logged in as 'Hi, CMS Supervisor' with a 'CS' profile. The form contains fields for 'Name' (Test), 'Code' (23124455), and 'Description' (Test Group). The 'Modules' section has a search bar and a dropdown menu. The dropdown menu is open, showing a list of modules: Configuration, Jobs, Ensemble, Reporting, Originations, Enquiry, and Assignment / Reassignment. The 'Jobs' module is highlighted. Below the dropdown menu, there are two panels: 'Jobs' and 'Customers'. Each panel has a red square icon and a list of actions: Create, Update, View, Delete, Checker, and Import. The 'Jobs' panel has a dropdown arrow next to the 'Import' action. The 'Customers' panel has a dropdown arrow next to the 'Import' action. The footer shows '2021 © Unikrew Solutions' and links for 'About', 'Team', and 'Contact'.

6. After you have selected a module, you can add more modules by following the same procedure. Once done, click on 'submit & stay' to save and stay on the page, or click on 'submit' to submit and leave the page.

CASCADE Customers Products Records Collections Configuration Identity Hi, CMS Supervisor CS

New Group Back Reset Submit & Stay Submit

Name* Test ✓ Code* 23124455 ✓ Description Test Group

Modules

Search... Select Modules

Jobs

Create X Update X View X Delete X Checker X Import X

Customers

Create X Update X View X Delete X Checker X Import X

7. Your newly created group will now show under the 'pending' tab.

CASCADE Products Records Reporting Collections Configuration Group created successfully Hi, Hasan Aamir HA

Groups Approved Pending

NAME	CODE	STATUS	ACTION PERFORMED	UPDATED
Test	123123	Draft	Added	1st Oct 2021, 01:40 pm N/A
gl	gl	Awaiting Approval	Deleted	29th Apr 2021, 03:44 pm N/A

10 Showing rows 1 to 2 of 2

8. If you want to make any changes to the group, you can click on 'edit' to do so. You can also duplicate the group by clicking on 'clone item' or delete it by clicking on 'delete item'.

CASCADE Products Records Reporting Collections Configuration Identity Originations Hi, Hasan Aamir HA

Groups Approved Pending

NAME	CODE	STATUS	ACTION PERFORMED	UPDATED
Test	123123	Draft	Added	1st Oct 2021, 01:40 pm N/A
gl	gl	Awaiting Approval	Deleted	29th Apr 2021, 03:44 pm N/A

10 Showing rows 1 to 2 of 2

9. After you are done with making all changes, select the group by ticking the check box then click on the 'maker checker action' button.

The screenshot shows the CASCADE Identity Management console. The top navigation bar includes 'Products', 'Records', 'Reporting', 'Collections', 'Configuration', 'Identity', and 'Originations'. The 'Identity' tab is active. Below the navigation bar, there's a 'Groups' section with tabs for 'Approved' and 'Pending'. A table lists groups with columns: NAME, CODE, STATUS, ACTION PERFORMED, and UPDATED. The first row, 'Primary Group', is selected with a checkbox. A red box highlights the 'Maker Checker Action' button at the bottom right.

NAME	CODE	STATUS	ACTION PERFORMED	UPDATED
Primary Group	123123	Draft	Added	1st Oct 2021, 02:05 pm • N/A
gl	gl	Awaiting Approval	Deleted	29th Apr 2021, 03:44 pm • N/A

10. Leave comments then click on 'send for approval'.

The screenshot shows the 'Maker Checker Dashboard'. It features a 'Comment:' field with the text 'Primary Group'. To the right of the comment field is a 'Send For Approval' button. Below the comment field, there are three icons: a red 'X', a green checkmark, and a yellow circle with a red 'X'. A red arrow points to the green checkmark icon.

Checker

1. From the checker account, click on the 'Groups' tab.

The screenshot shows the CASCADE Identity management interface. The top navigation bar includes 'Products', 'Records', 'Reporting', 'Reports', 'Collections', 'Configuration', 'Identity', and 'Originations'. The 'Identity' menu is open, showing 'Users', 'Modules', and 'Groups'. The 'Groups' tab is selected, displaying a table with two groups: 'Test' and 'gl'. Both groups have a status of 'Awaiting Approval'.

NAME	CODE	STATUS	ACTION PERFORMED	UPDATED
Test	23124455	Awaiting Approval	Added	16th Nov 2021, 03:07 pm • CMS Supervisor
gl	gl	Awaiting Approval	Deleted	29th Apr 2021, 03:44 pm • Naveed

2. Then click on 'pending'. Here you will see the groups that require approval including the one that was just created.

The screenshot shows the CASCADE Identity management interface. The 'Identity' menu is open, and the 'Groups' tab is selected. The 'Pending' filter is selected, and a red arrow points to it. The table below shows two groups: 'Test' and 'gl'. Both groups have a status of 'Awaiting Approval'.

NAME	CODE	STATUS	ACTION PERFORMED	UPDATED
Test	23124455	Awaiting Approval	Added	16th Nov 2021, 03:07 pm • CMS Supervisor
gl	gl	Awaiting Approval	Deleted	29th Apr 2021, 03:44 pm • Naveed

3. Select a group by ticking the check box, then click on the 'maker checker action' button.

The screenshot shows the CASCADE Identity Groups page. The top navigation bar includes 'Products', 'Records', 'Reporting', 'Reports', 'Collections', 'Configuration', 'Identity', and 'Originations'. The 'Identity' tab is active. Below the navigation bar, there are tabs for 'Groups', 'Approved', and 'Pending'. The 'Groups' tab is selected. A table lists groups with columns: NAME, CODE, STATUS, ACTION PERFORMED, and UPDATED. The first row shows a group named 'Test' with code '23124455', status 'Awaiting Approval', and action 'Added'. The second row shows a group named 'gl' with code 'gl', status 'Awaiting Approval', and action 'Deleted'. A red box highlights the checkbox for the 'Test' group, and a red arrow points to the 'maker checker action' button in the bottom right corner.

NAME	CODE	STATUS	ACTION PERFORMED	UPDATED
Test	23124455	Awaiting Approval	Added	16th Nov 2021, 03:07 pm • CMS Supervisor
gl	gl	Awaiting Approval	Deleted	29th Apr 2021, 03:44 pm • Naveed

4. Leave a comment, then click on 'approve' to approve the group. You can also click on 'reject' to reject the group or click on 'send for review' to send it to a third person for further review.

The screenshot shows the 'Maker Checker Dashboard' modal. It has a 'Comment:' label and a text input field. To the right of the input field are four buttons: 'send for review' (green arrow), 'approve' (blue checkmark), 'reject' (red X), and 'send for review' (yellow magnifying glass). A red box highlights these four buttons. The background shows the same table as the previous screenshot, with the 'Test' group selected.

5. The newly created group will now show as approved under the 'approved' tab.

CASCADE

CustomersProductsRecordsCollectionsConfigurationIdentity

Hi, CMS SupervisorCS

Groups

ApprovedPending

Import from ExcelNew GroupExport

NAME	CODE	STATUS	TYPE	MODIFIED
Test	23124455	Approved	Active	16th Nov 2021, 03:38 pm • Hasan Aamir
Seeded Admin	SA	Approved	Active	13th Nov 2021, 10:39 pm • Ifrah Khan
OPS-Checker	ICFChecker	Approved	Active	12th Nov 2021, 01:01 pm • test_SQA_1
RPC - Checker	SAAFRPCChecker	Approved	Active	11th Nov 2021, 02:53 pm • test_SQA_1

Fields Maker

1. Click on the 'fields' tab.

The screenshot shows the Cascade Fields Maker interface. The top navigation bar includes the Cascade logo, a menu with 'Customers', 'Products', 'Records', 'Collections', 'Configuration', and 'Identity', and a user profile 'Hi, CMS Supervisor' with a 'CS' icon. The 'Configuration' menu is open, and the 'Fields' option is highlighted with a red box and a red arrow. Below the menu, the 'Fields' tab is selected, showing a table of approved fields. The table has columns for NAME, CODE, DATA TYPE, STATUS, TYPE, and MODIFIED. The data rows are:

NAME	CODE	DATA TYPE	STATUS	TYPE	MODIFIED
Profit frequency	ICF0106	String	Approved	Active	15th Nov 2021, 04:41 pm • test_SQA_1
Review frequency	ICF0107	String	Approved	Active	15th Nov 2021, 04:41 pm • test_SQA_1
Frequency	ICFFrequency	Number	Approved	Active	15th Nov 2021, 12:29 pm • test_SQA_1
Deal Booking Type	ICFDEALBOOKINGTYPE00	Select	Approved	Active	15th Nov 2021, 11:51 am • test_SQA_1

2. Here you will see all the approved fields.

The screenshot shows the Cascade Fields Maker interface. The top navigation bar includes the Cascade logo, a menu with 'Customers', 'Products', 'Records', 'Collections', 'Configuration', and 'Identity', and a user profile 'Hi, CMS Supervisor' with a 'CS' icon. The 'Configuration' menu is open, and the 'Fields' option is highlighted. Below the menu, the 'Fields' tab is selected, showing a table of approved fields. The table has columns for NAME, CODE, DATA TYPE, STATUS, TYPE, and MODIFIED. The data rows are:

NAME	CODE	DATA TYPE	STATUS	TYPE	MODIFIED
Profit frequency	ICF0106	String	Approved	Active	15th Nov 2021, 04:41 pm • test_SQA_1
Review frequency	ICF0107	String	Approved	Active	15th Nov 2021, 04:41 pm • test_SQA_1
Frequency	ICFFrequency	Number	Approved	Active	15th Nov 2021, 12:29 pm • test_SQA_1
Deal Booking Type	ICFDEALBOOKINGTYPE00	Select	Approved	Active	15th Nov 2021, 11:51 am • test_SQA_1
Margin	ICFMargin	Number	Approved	Active	15th Nov 2021, 10:34 am • test_SQA_1
Name	SAAFgid002	String	Approved	Active	14th Nov 2021, 01:48 pm • test_SQA_1

3. Click on 'new field' to create a new field.

CASCADE Customers Products Records Collections Configuration Identity Hi, CMS Supervisor CS

Fields Approved Pending Import from Excel New Field Export

NAME Enter Name... CODE Enter Code... DATA TYPE Select Data Type... STATUS TYPE MODIFIED

Profit frequency	ICF0106	String	Approved	Active	15th Nov 2021, 04:41 pm	test_SQA_1
Review frequency	ICF0107	String	Approved	Active	15th Nov 2021, 04:41 pm	test_SQA_1
Frequency	ICFFrequency	Number	Approved	Active	15th Nov 2021, 12:29 pm	test_SQA_1

4. Fill all the required fields.

CASCADE Products Records Reporting Collections Configuration Identity Originations Hi, Hasan Aamir HA

New Field Back Reset Submit & Stay

Name* Test Field 1 ✓ Code* 23456777 ✓ Description Enter Description

Data Type* Select Master Data Type Junni Dependent Fields Dependent Fields

Sub Fields Sub Fields Minimum Length Enter Minimum Length ✓ Maximum Length Enter Maximum Length ✓

Default Value Type Default Value Type Enter Default Value Default Value Field Default Value Field

Tags Tags Group Group Header Header

Belonging Application X Fuzzy Threshold Enter Fuzzy Threshold ✓ Fuzzy Search

Mandatory Computation Type Computation Type Field For Computations Field For Computations

5. 'Data type' will allow you to choose the type of field to create.

For example, 'select' will create a field with a drop down menu. 'String' will create a field with an empty text box.

The screenshot shows the 'New Field' configuration page in the Cascade application. The 'Data Type' dropdown is open, displaying a list of options: List, Multi Select, Number, Radio Button, Rich Text Box, Select (highlighted in blue), String, Time Picker, and Toggle. The 'Select' option is highlighted in blue. The page includes various configuration fields such as Name, Code, Description, Master Data Type, Minimum Length, Maximum Length, Default Value, Group, Fuzzy Threshold, Computation Type, and Field For Computations. The 'Select' option is highlighted in blue.

6. 'Master data type' will allow you to select the options shown under the drop down menu if you choose 'select' as the data type.

The screenshot shows the 'New Field' configuration page in the Cascade application. The 'Master Data Type' dropdown is open, displaying a list of options: Global Configuration (highlighted in blue), SBFPCT, ApplierType, Partnership, Analysis Code, P4 Code, P3 Code, Tags, Obsolescence risk, and Recayment frequency. The 'Global Configuration' option is highlighted in blue. The page includes various configuration fields such as Name, Code, Description, Data Type, Sub Fields, Default Value Type, Tags, Belonging, and Field For Computations. The 'Global Configuration' option is highlighted in blue.

7. 'Tags' will allow you set certain parameters for the field that you are creating.

The screenshot shows the CASCADE Configuration page. The 'Tags' dropdown menu is open, displaying options: 'Allow Current Date', 'Allow Future Dates Only', 'Allow Last 30 Days', 'Allow Next 30 Days', 'Allow Past Dates Only', and 'Allow Past Days'. The 'Tags' dropdown is highlighted with a red box. Other configuration options like 'Data Type', 'Sub Fields', 'Default Value Type', 'Minimum Length', 'Maximum Length', 'Default Value', 'Group', 'Fuzzy Threshold', 'Computation Type', 'Field For Computations', 'Is Import Allowed', and 'Is Hidden' are also visible.

8. These are some of the checkboxes that you can tick to change the nature of the field.

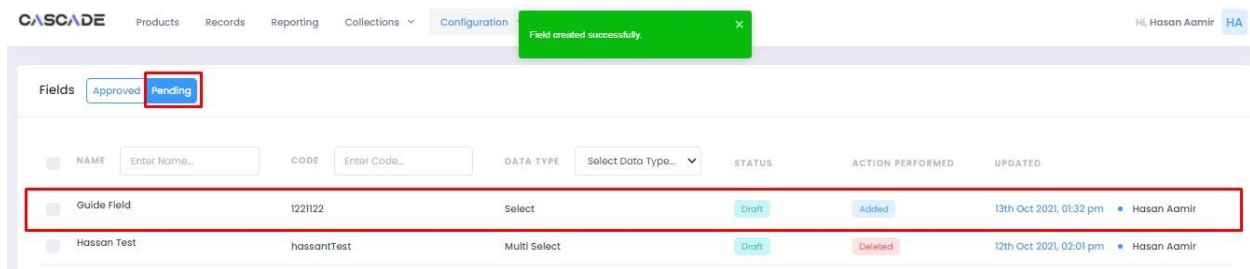
'Mandatory' makes the field mandatory to fill. 'Readonly' makes the field read-only. 'Hidden' keeps the field present but hidden.

The screenshot shows the CASCADE Configuration page. The 'Mandatory', 'Readonly', and 'Hidden' checkboxes are highlighted with red boxes. Other configuration options like 'Data Type', 'Sub Fields', 'Default Value Type', 'Minimum Length', 'Maximum Length', 'Default Value', 'Group', 'Fuzzy Threshold', 'Computation Type', 'Field For Computations', 'Is Import Allowed', and 'Is Hidden' are also visible.

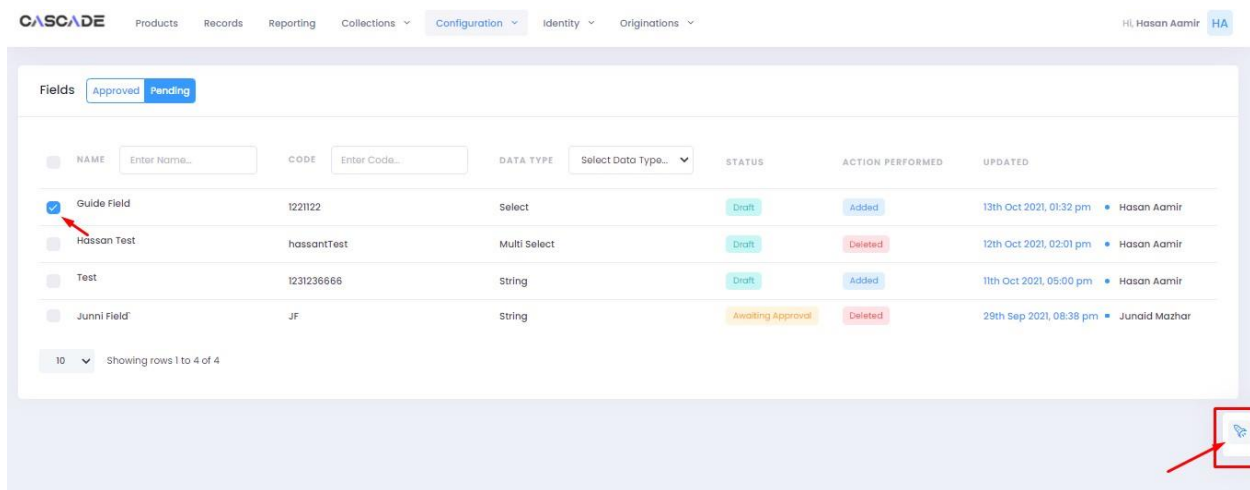
9. Once completed, click on 'submit & stay' to submit and stay on the page, or click on 'submit' to submit and leave the page.

The screenshot shows the CASCADE 'New Field' page. The 'Submit & Stay' and 'Submit' buttons are highlighted with red boxes. A red arrow points to the 'Submit & Stay' button. Other fields like 'Name', 'Code', 'Description', 'Data Type', 'Sub Fields', 'Minimum Length', 'Maximum Length', 'Default Value', 'Group', 'Fuzzy Threshold', 'Computation Type', 'Field For Computations', 'Is Import Allowed', and 'Is Hidden' are also visible.

10. New field will now appear under the 'pending' tab.

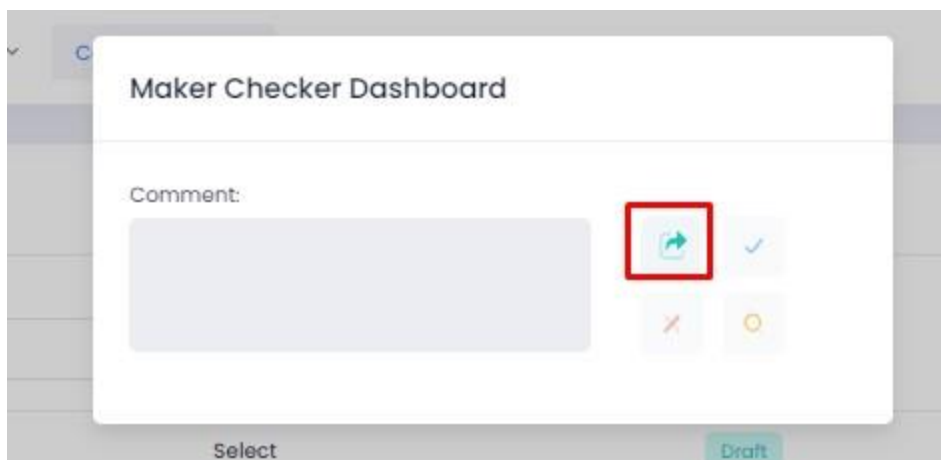


11. Select the new field by ticking the check box then click on the 'maker checker action' button to send it for approval.



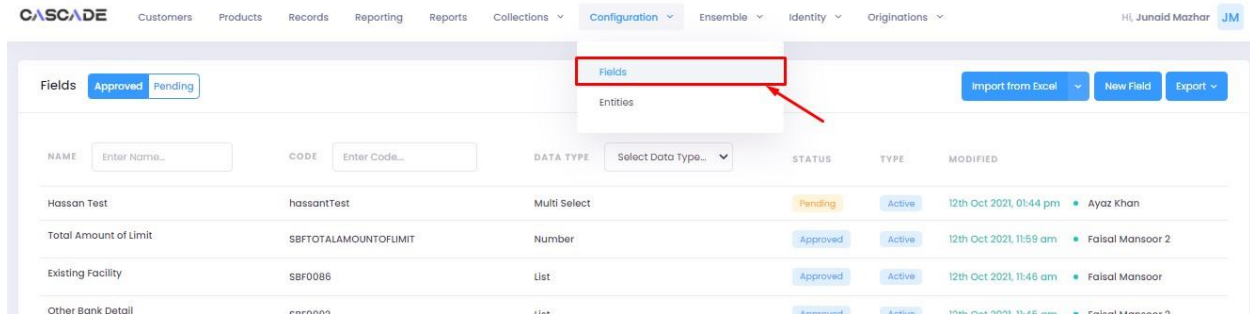
12. Leave comments then click on 'send for approval' button.

Note: The newly created field will now require approval from a checker.

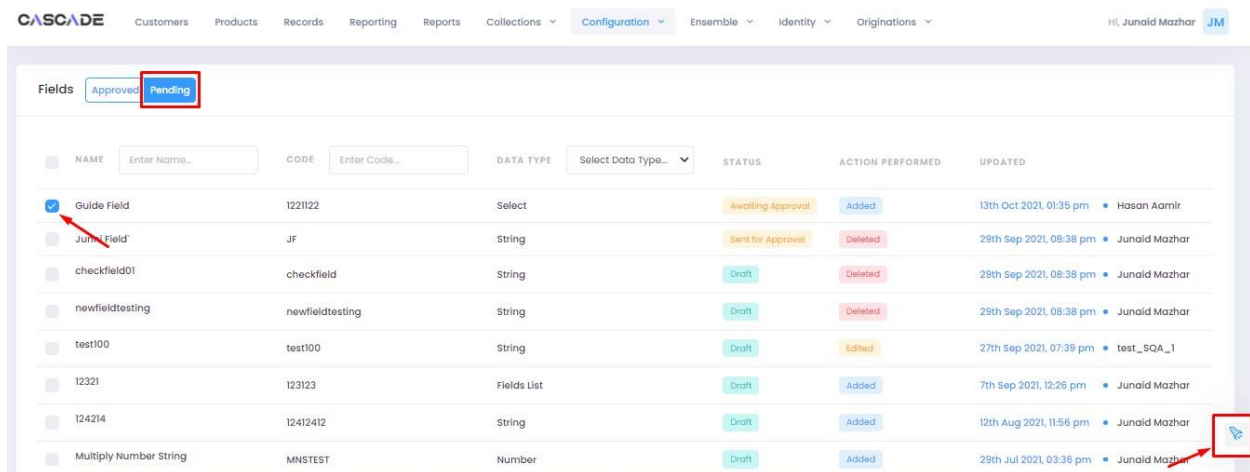


Checker

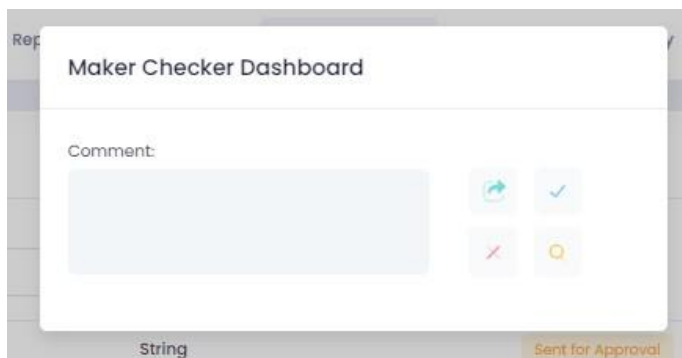
1. Go to the 'fields' tab from the checker account.



2. Then click on the 'pending' tab where you will see all the pending entries. Select the one that requires approval by ticking the check box, then click on the 'maker checker action' button.



3. Leave comments then click on 'approve' to approve.



4. The newly created field will now show as approved. You can also edit, clone, or delete it.

CASCADE Products Records Reporting Collections Configuration Identity Originations Hi, Hasan Aamir HA

Fields **Approved** Pending Import from Excel New Field Export

NAME	CODE	DATA TYPE	STATUS	TYPE	MODIFIED
Guide Field	1221122	Select	Approved	Active	13th Oct 2021, 04:10 pm Junaid Mazhar
Hassan Test	hassantest	Multi Select	Pending	Active	12th Oct 2021, 01:44 pm Ayaz Khan
Total Amount of Limit	SBFTOTALAMOUNTOFLIMIT	Number	Approved	Active	12th Oct 2021, 11:59 am Faisal Mansoor 2
Existing Facility	SBF0086	List	Approved	Active	12th Oct 2021, 11:46 am Faisal Mansoor
Other Bank Detail	SBF0092	List	Approved	Active	12th Oct 2021, 11:45 am Faisal Mansoor 2
Total Existing Facility Limit	SBFTOTALEXISTINGFACILITYLIMIT	Number	Approved	Active	12th Oct 2021, 11:45 am Faisal Mansoor 2

CASCADE Products Records Reporting Collections Configuration Identity Originations Hi, Hasan Aamir HA

Fields **Approved** Pending Import from Excel New Field Export

Edit Item

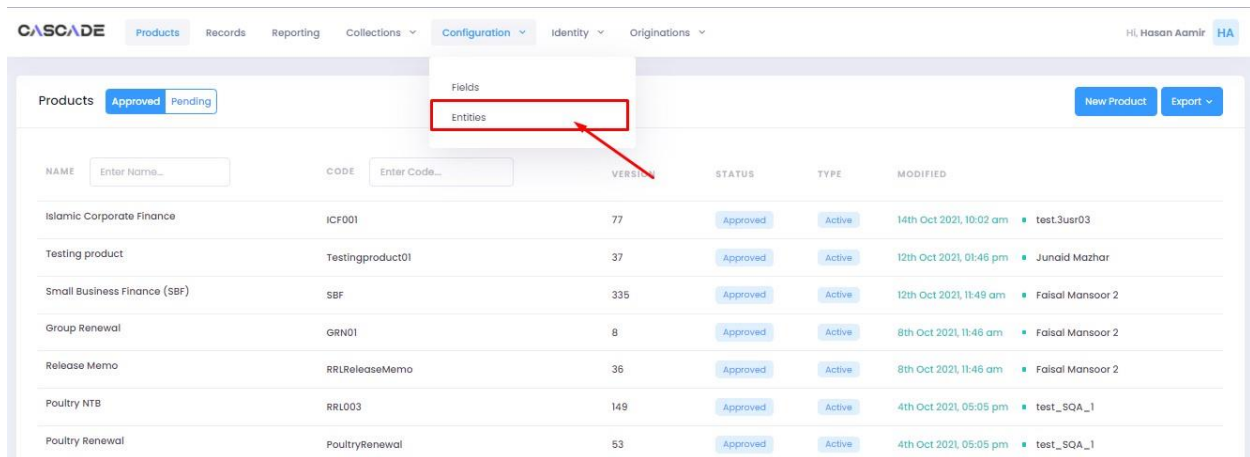
Clone Item

Delete Item

NAME	CODE	DATA TYPE	STATUS	TYPE	MODIFIED
Guide Field	1221122	Select	Approved	Active	13th Oct 2021, 04:10 pm Junaid Mazhar

Entities Maker

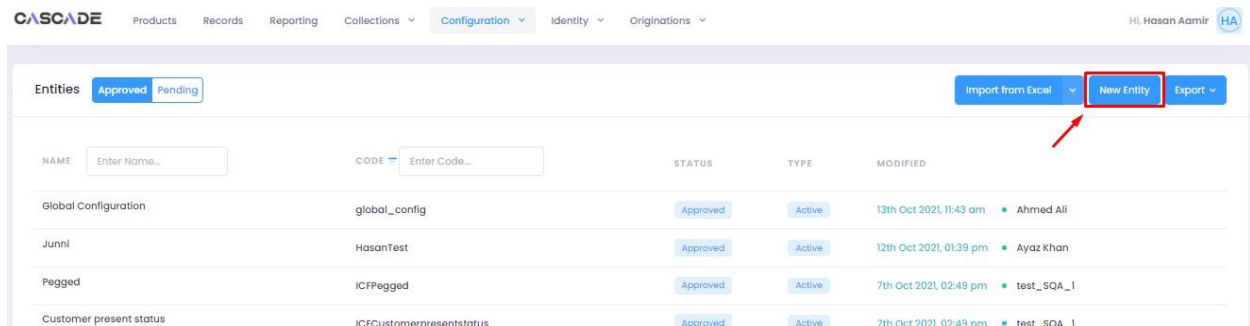
1. Click on the 'entities' tab.



The screenshot shows the CASCADE application interface. The top navigation bar includes 'Products', 'Records', 'Reporting', 'Collections', 'Configuration', 'Identity', and 'Originations'. The 'Configuration' dropdown menu is open, and the 'Entities' option is highlighted with a red box and a red arrow. The main content area shows the 'Products' tab with a table of existing products.

NAME	CODE	VERSION	STATUS	TYPE	MODIFIED
Islamic Corporate Finance	ICF001	77	Approved	Active	14th Oct 2021, 10:02 am
Testing product	Testingproduct01	37	Approved	Active	12th Oct 2021, 01:46 pm
Small Business Finance (SBF)	SBF	335	Approved	Active	12th Oct 2021, 11:48 am
Group Renewal	GRN01	8	Approved	Active	8th Oct 2021, 11:46 am
Release Memo	RRReleaseMemo	36	Approved	Active	8th Oct 2021, 11:46 am
Poultry NTB	RRLD03	149	Approved	Active	4th Oct 2021, 05:05 pm
Poultry Renewal	PoultryRenewal	53	Approved	Active	4th Oct 2021, 05:05 pm

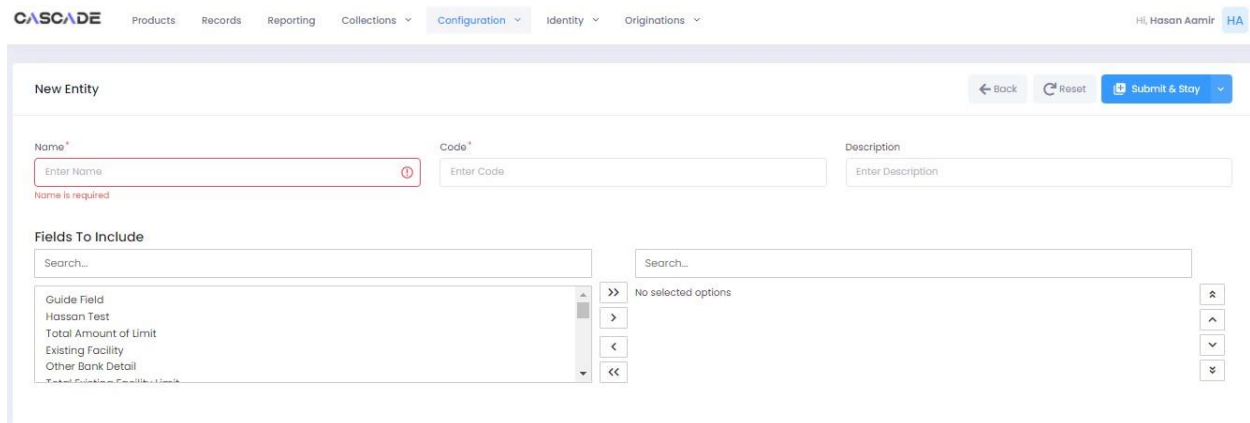
2. Click on 'new entity' to create a new entity.



The screenshot shows the CASCADE application interface with the 'Entities' tab selected. The top navigation bar is the same as the previous screenshot. The main content area shows the 'Entities' tab with a table of existing entities. The 'New Entity' button is highlighted with a red box and a red arrow.

NAME	CODE	STATUS	TYPE	MODIFIED
Global Configuration	global_config	Approved	Active	13th Oct 2021, 11:43 am
Junni	HasanTest	Approved	Active	12th Oct 2021, 01:39 pm
Pegged	ICFPegged	Approved	Active	7th Oct 2021, 02:49 pm
Customer present status	ICFCustomerpresentstatus	Approved	Active	7th Oct 2021, 02:49 pm

3. Fill all the required fields.



New Entity

← Back Reset **Submit & Stay**

Name* Code* Description

Enter Name Enter Code Enter Description

Name is required

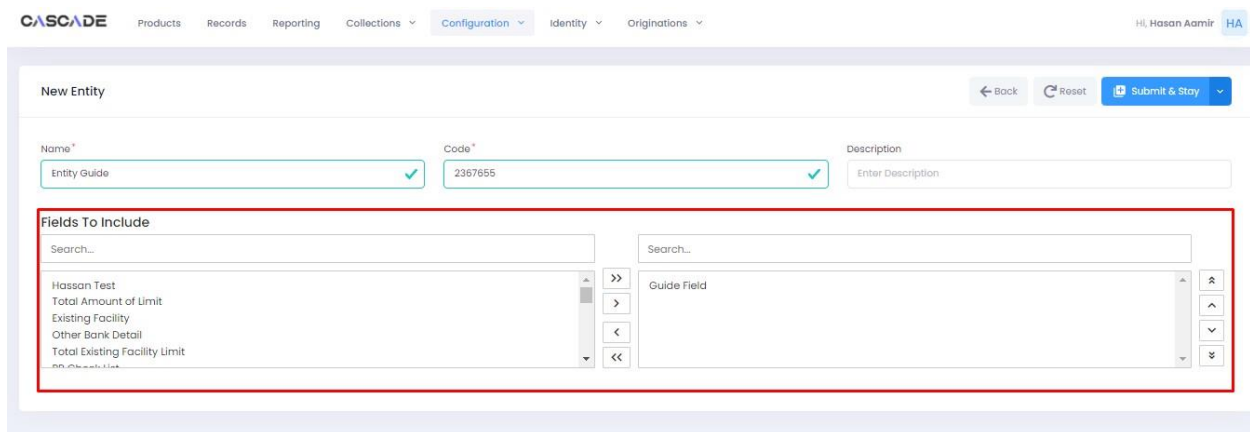
Fields To Include

Search... Search...

Guide Field
Hassan Test
Total Amount of Limit
Existing Facility
Other Bank Detail
Total Existing Facility Limit

No selected options

4. You can also choose 'fields' to include in the new entity.



New Entity

← Back Reset **Submit & Stay**

Name* Code* Description

Entity Guide 2367655 Enter Description

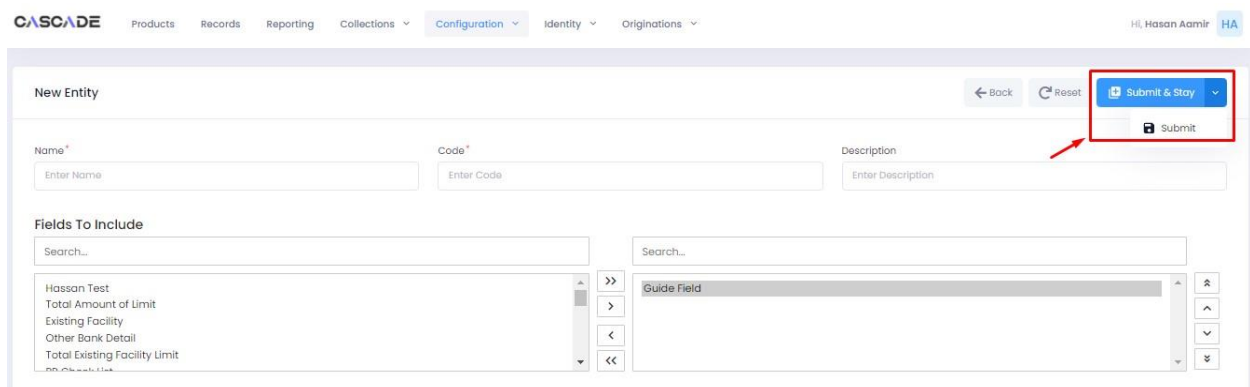
Fields To Include

Search... Search...

Hassan Test
Total Amount of Limit
Existing Facility
Other Bank Detail
Total Existing Facility Limit

Guide Field

5. Once completed, click on 'submit & stay' to submit and stay on the page, or click on 'submit' to submit and leave the page.



New Entity

← Back Reset **Submit & Stay** Submit

Name* Code* Description

Enter Name Enter Code Enter Description

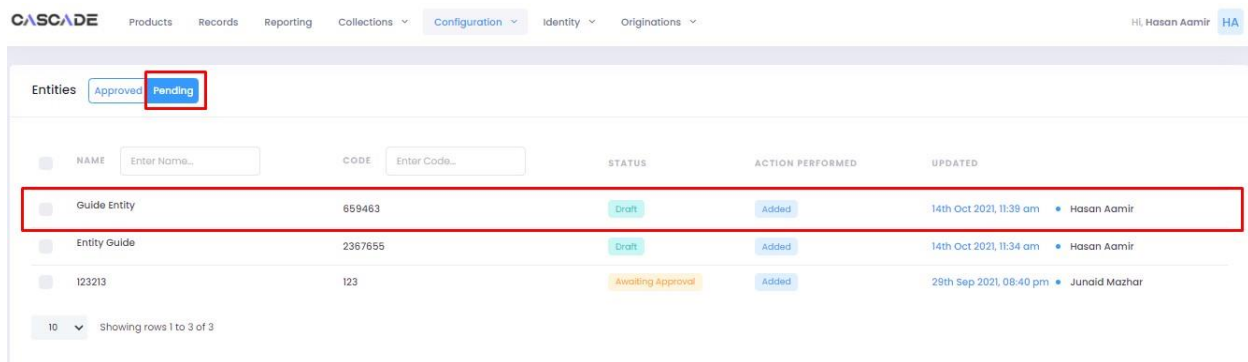
Fields To Include

Search... Search...

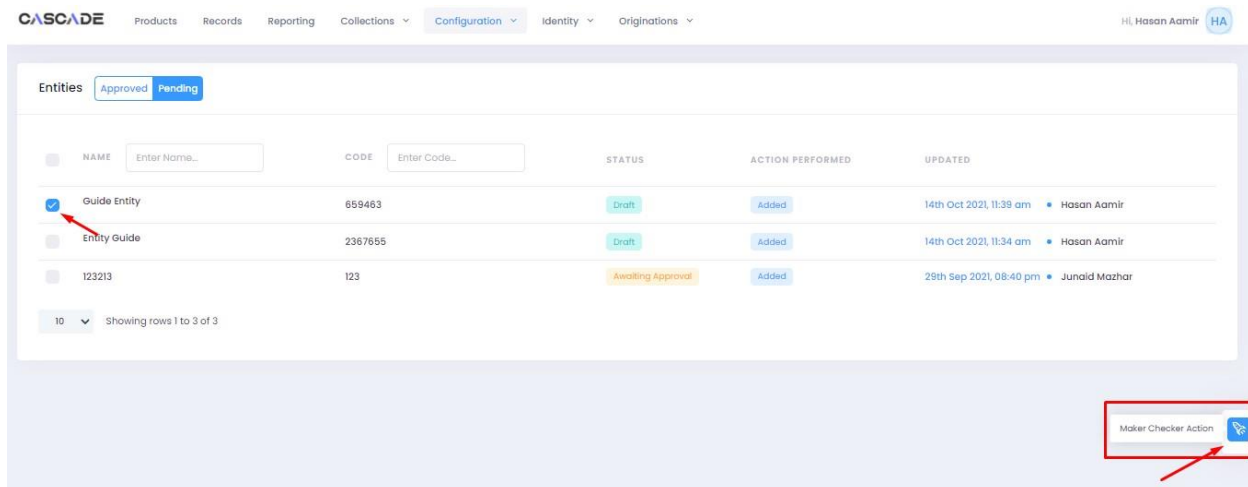
Hassan Test
Total Amount of Limit
Existing Facility
Other Bank Detail
Total Existing Facility Limit

Guide Field

6. Newly created 'entity' will now show under the 'pending' tab.

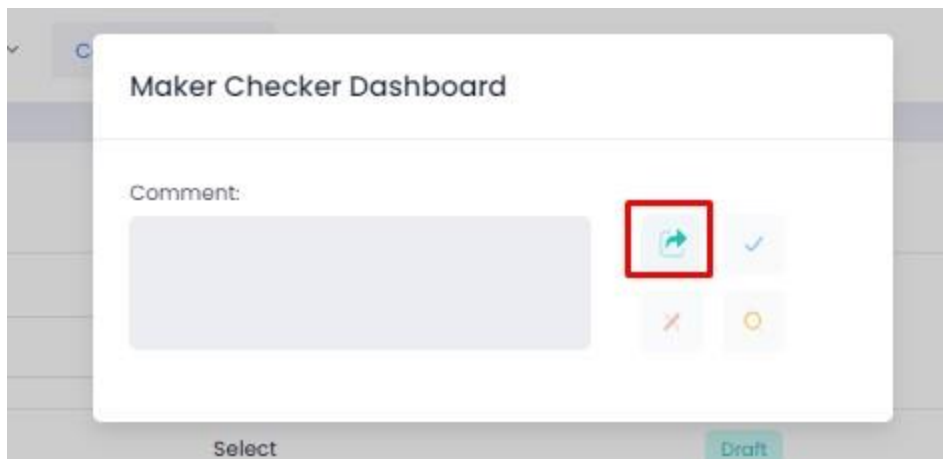


7. Select the new entity by ticking the check box then click on the 'maker checker action' button to send it for approval.



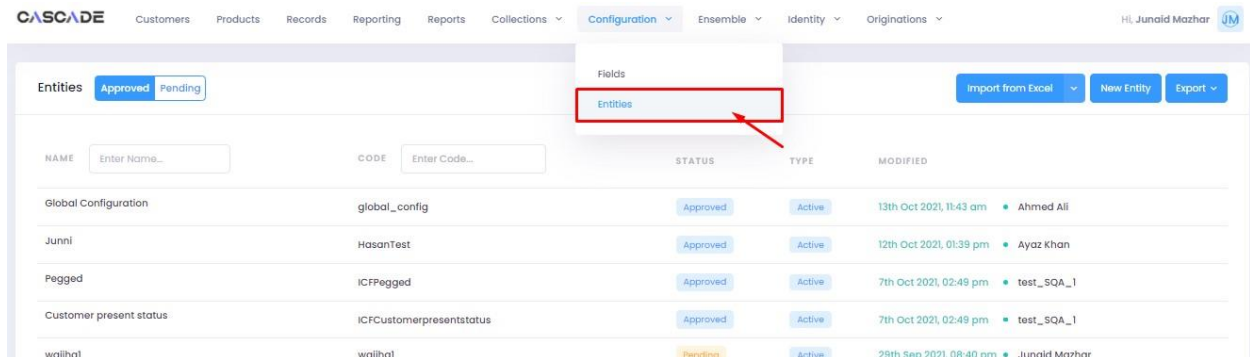
8. Leave comments then click on 'send for approval' button.

Note: The newly created field will now require approval from a checker.



Checker

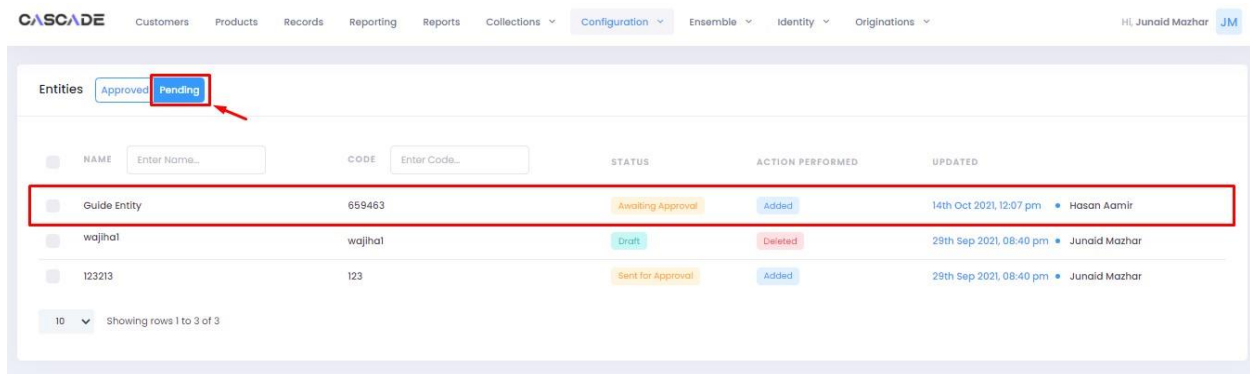
1. Click on the 'entities' tab.



The screenshot shows the CASCADE Configuration page. The top navigation bar includes 'Customers', 'Products', 'Records', 'Reporting', 'Reports', 'Collections', 'Configuration', 'Ensemble', 'Identity', and 'Originations'. The 'Configuration' dropdown menu is open, and the 'Entities' option is highlighted with a red box and a red arrow. The main content area shows the 'Entities' tab with filters for 'Approved' and 'Pending'. The table below lists entities with columns: NAME, CODE, STATUS, TYPE, and MODIFIED.

NAME	CODE	STATUS	TYPE	MODIFIED
Global Configuration	global_config	Approved	Active	13th Oct 2021, 11:43 am • Ahmed Ali
Junni	HasanTest	Approved	Active	12th Oct 2021, 01:39 pm • Ayaz Khan
Pegged	ICFPegged	Approved	Active	7th Oct 2021, 02:49 pm • test_SQA_1
Customer present status	ICFCustomerpresentstatus	Approved	Active	7th Oct 2021, 02:49 pm • test_SQA_1
wajihal	wajihal	Pending	Active	29th Sep 2021, 08:40 pm • Junaid Mazhar

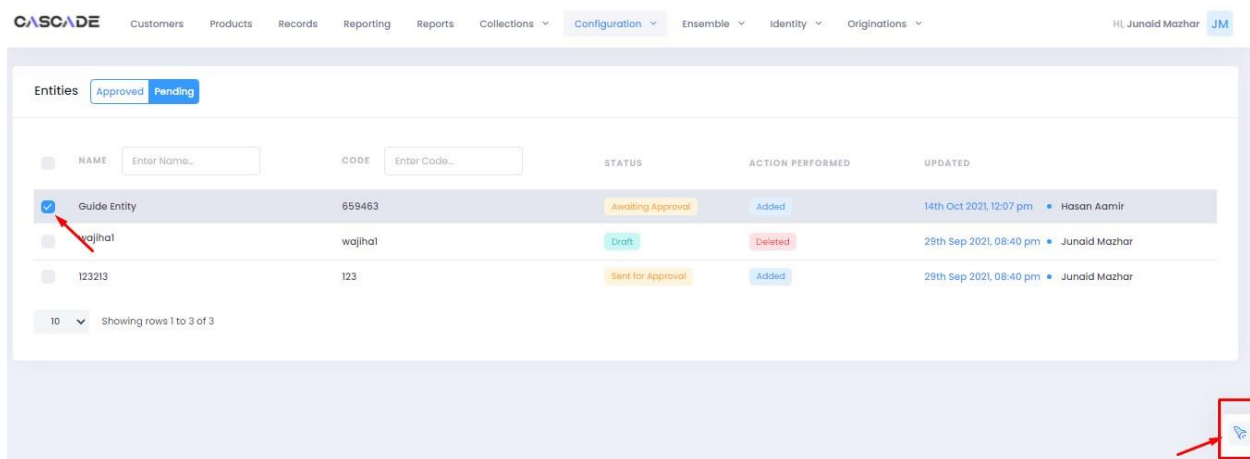
2. Then click on 'pending' to view all pending entities.



The screenshot shows the CASCADE Configuration page with the 'Entities' tab selected. The 'Pending' filter is highlighted with a red box and a red arrow. The table below lists pending entities with columns: NAME, CODE, STATUS, ACTION PERFORMED, and UPDATED.

NAME	CODE	STATUS	ACTION PERFORMED	UPDATED
Guide Entity	659463	Awaiting Approval	Added	14th Oct 2021, 12:07 pm • Hasan Aamir
wajihal	wajihal	Draft	Deleted	29th Sep 2021, 08:40 pm • Junaid Mazhar
123213	123	Sent for Approval	Added	29th Sep 2021, 08:40 pm • Junaid Mazhar

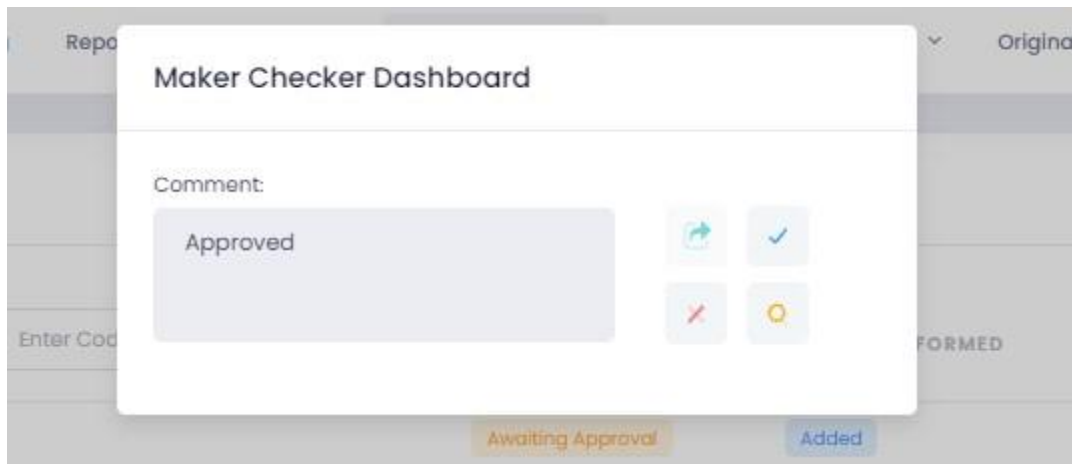
3. Select the entity by ticking the check box then click on the 'maker checker action' button.



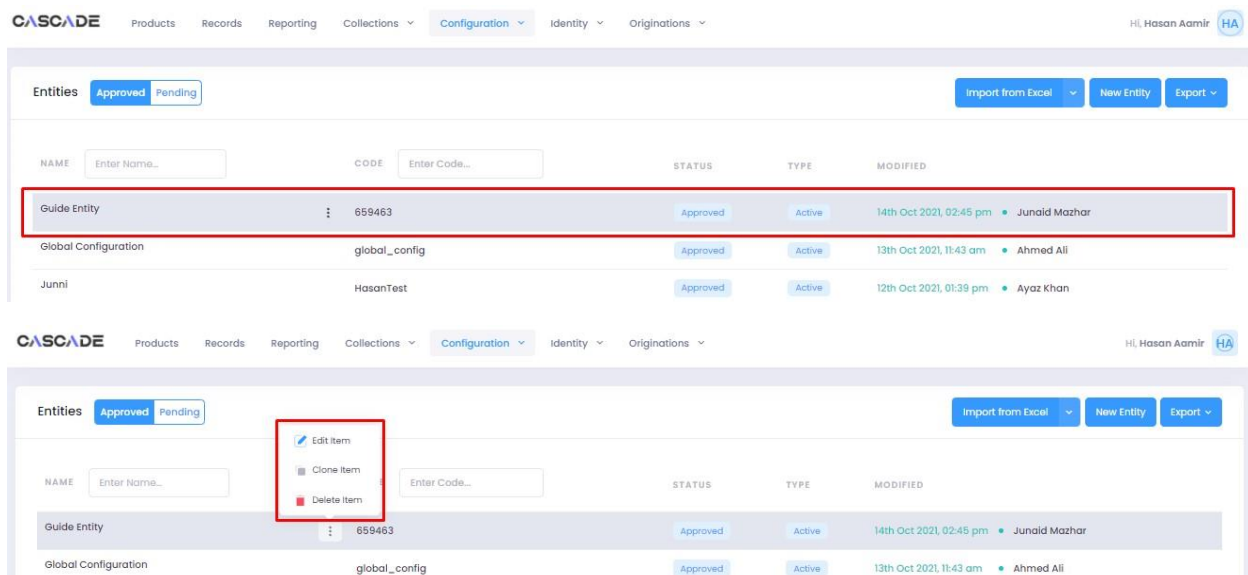
The screenshot shows the CASCADE Configuration page with the 'Entities' tab selected. The 'Pending' filter is selected. The 'Guide Entity' row is selected, and the 'maker checker action' button is highlighted with a red box and a red arrow.

NAME	CODE	STATUS	ACTION PERFORMED	UPDATED
<input checked="" type="checkbox"/> Guide Entity	659463	Awaiting Approval	Added	14th Oct 2021, 12:07 pm • Hasan Aamir
<input type="checkbox"/> wajihal	wajihal	Draft	Deleted	29th Sep 2021, 08:40 pm • Junaid Mazhar
<input type="checkbox"/> 123213	123	Sent for Approval	Added	29th Sep 2021, 08:40 pm • Junaid Mazhar

4. Leave comments then click on 'approve' to approve the entity.

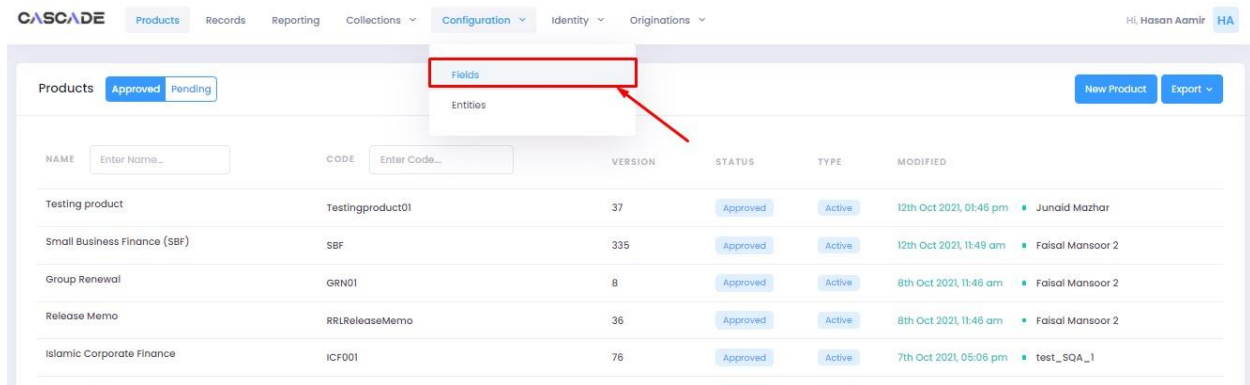


5. The newly created entity will now show as approved. You can also edit, clone, or delete it.



Records

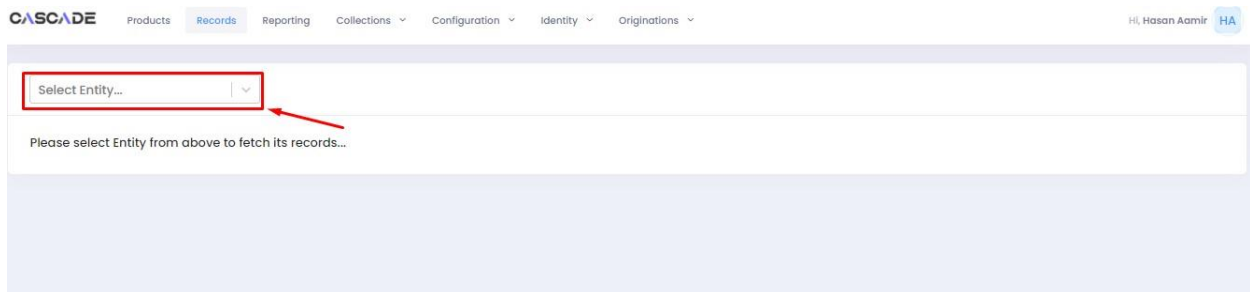
1. Click on the 'records' tab.



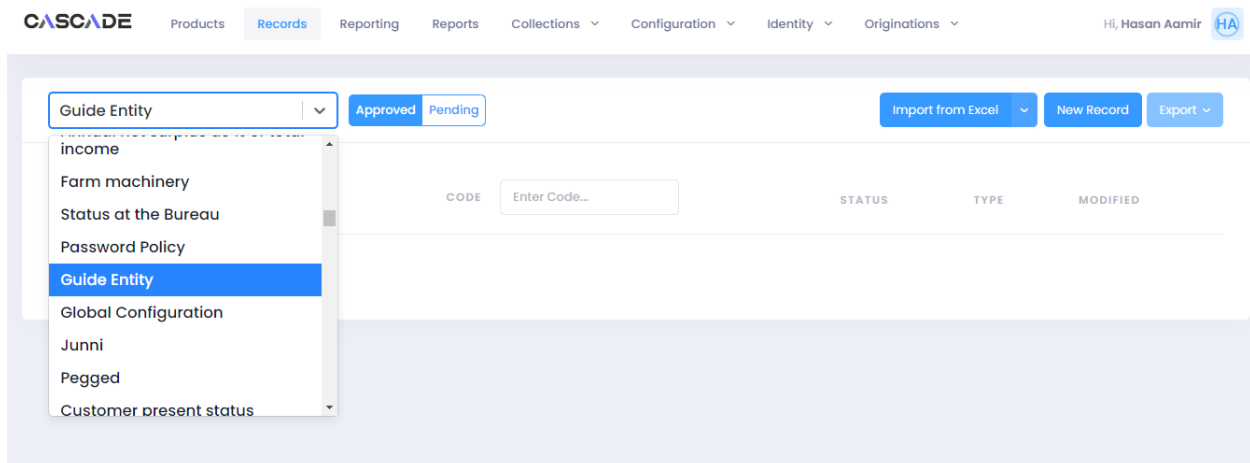
The screenshot shows the CASCADE system interface. The top navigation bar includes 'Products', 'Records', 'Reporting', 'Collections', 'Configuration', 'Identity', and 'Originations'. The 'Configuration' tab is active, and a dropdown menu is open, showing 'Fields' and 'Entities'. A red arrow points to the 'Fields' option. Below the navigation bar, there is a 'Products' section with 'Approved' and 'Pending' tabs. A table lists products with columns: NAME, CODE, VERSION, STATUS, TYPE, and MODIFIED. The table contains five rows of product data.

NAME	CODE	VERSION	STATUS	TYPE	MODIFIED
Testing product	Testingproduct01	37	Approved	Active	12th Oct 2021, 01:46 pm
Small Business Finance (SBF)	SBF	335	Approved	Active	12th Oct 2021, 11:49 am
Group Renewal	GRN01	8	Approved	Active	8th Oct 2021, 11:46 am
Release Memo	RRReleaseMemo	36	Approved	Active	8th Oct 2021, 11:46 am
Islamic Corporate Finance	ICF001	76	Approved	Active	7th Oct 2021, 05:06 pm

2. Select an entity from the drop down menu.



The screenshot shows the CASCADE system interface. The top navigation bar includes 'Products', 'Records', 'Reporting', 'Collections', 'Configuration', 'Identity', and 'Originations'. The 'Records' tab is active. Below the navigation bar, there is a 'Select Entity...' dropdown menu. A red arrow points to the dropdown menu. Below the dropdown menu, there is a message: 'Please select Entity from above to fetch its records...'



The screenshot shows the CASCADE system interface. The top navigation bar includes 'Products', 'Records', 'Reporting', 'Reports', 'Collections', 'Configuration', 'Identity', and 'Originations'. The 'Records' tab is active. Below the navigation bar, there is a 'Guide Entity' dropdown menu. A red arrow points to the dropdown menu. Below the dropdown menu, there is a message: 'Please select Entity from above to fetch its records...'

CODE	STATUS	TYPE	MODIFIED
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3. Click on 'new record' to create a new record under the entity selected.

The screenshot shows the CASCADE application interface. The top navigation bar includes the CASCADE logo, a menu with 'Products', 'Records', 'Reporting', 'Reports', 'Collections', 'Configuration', 'Identity', and 'Originations', and a user profile 'Hi, Hasan Aamir' with a 'HA' icon. Below the navigation bar, there is a section for 'Guide Entity' with a dropdown menu. To the right of this are buttons for 'Approved', 'Pending', 'Import from Excel', 'New Record' (highlighted with a red box and a red arrow), and 'Export'. Below these buttons are input fields for 'NAME' (with placeholder 'Enter Name...'), 'CODE' (with placeholder 'Enter Code...'), and a table with columns 'STATUS', 'TYPE', and 'MODIFIED'. At the bottom, there is a pagination control showing '10' rows and 'Showing rows 0 to 0 of 0'.

4. Fill all the required details.

The screenshot shows the 'New Record' form in the CASCADE application. The form has a title 'New Record' and a navigation bar with 'Back', 'Reset', and 'Submit & Stay' buttons. The form contains several input fields: 'Name*' (with placeholder 'Enter Name'), 'Code*' (with placeholder 'Enter Code'), 'Description' (with placeholder 'Enter Description'), 'Order' (with placeholder 'Enter Order'), and 'Guide Field' (with a dropdown menu). A red box highlights the 'Name*', 'Code*', and 'Description' fields.

5. After filling all the details, click on 'submit & stay' to submit and stay on the same page or click on 'submit' to submit and exit.

The screenshot shows the 'New Record' form in the CASCADE application. The form has a title 'New Record' and a navigation bar with 'Back', 'Reset', and 'Submit & Stay' buttons. The form contains several input fields: 'Name*' (with value 'Record Guide' and a green checkmark), 'Code*' (with value '56693552' and a green checkmark), 'Description' (with value 'Record Guide'), 'Order' (with value '1' and a green checkmark), and 'Guide Field' (with value 'User Configuration' and a dropdown menu). A red box highlights the 'Submit & Stay' button and a 'Submit' button below it. A red arrow points to the 'Submit' button.

6. The newly created 'record' will now show under the 'pending' tab.

CASCADE Products **Records** Reporting Reports Collections Configuration Identity Originations Hi, Hasan Aamir HA

Guide Entity

<input type="checkbox"/>	NAME	CODE	STATUS	ACTION PERFORMED	UPDATED
<input type="checkbox"/>	Record Guide	56693552	Draft	Added	8th Nov 2021, 05:32 pm • Hasan Aamir

10 Showing rows 1 to 1 of 1

7. Select the new entity by ticking the check box then click on the 'maker checker action' button to send it for approval.

CASCADE Products **Records** Reporting Reports Collections Configuration Identity Originations Hi, Hasan Aamir HA

Guide Entity

<input type="checkbox"/>	NAME	CODE	STATUS	ACTION PERFORMED	UPDATED
<input checked="" type="checkbox"/>	Record Guide	56693552	Draft	Added	8th Nov 2021, 05:32 pm • Hasan Aamir

10 Showing rows 1 to 1 of 1

