



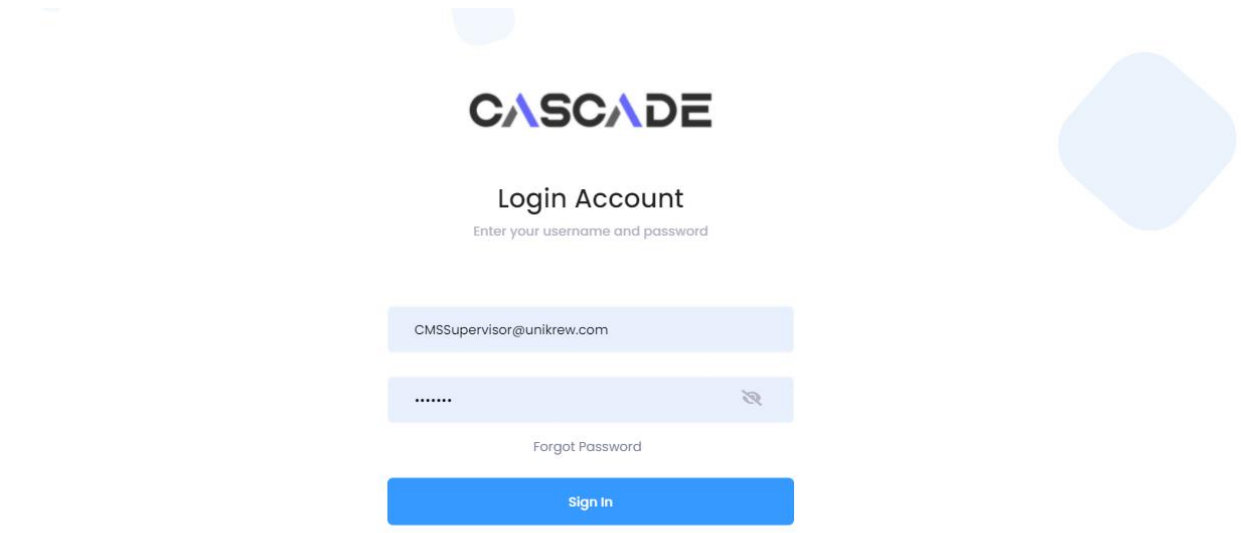
Collections Guide

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CMS Supervisor

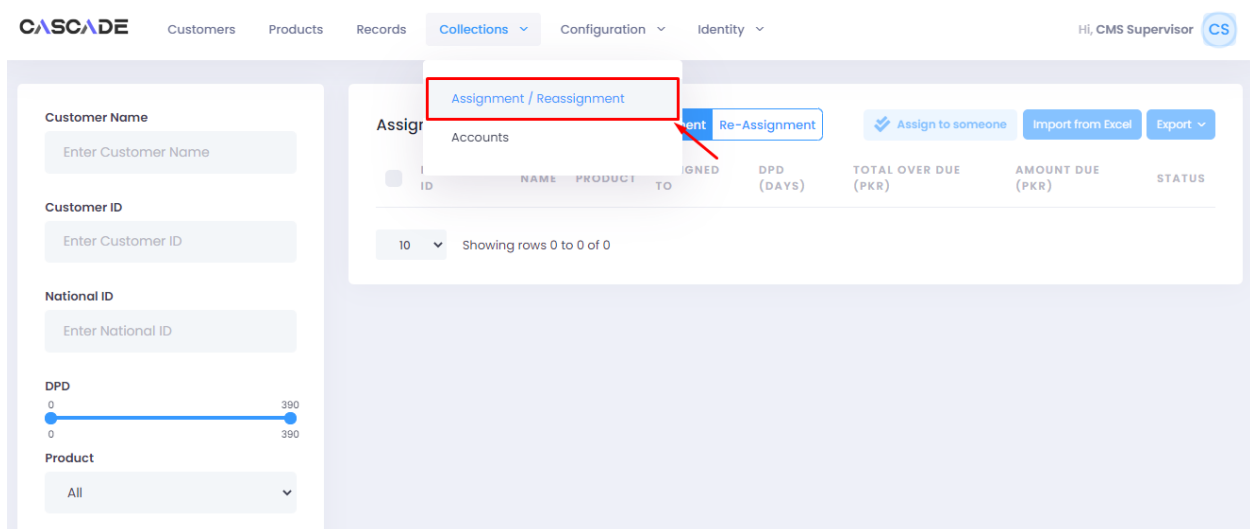
1. Log in using your credentials.



The image shows the login page for CMS Supervisor. At the top, the CASCADE logo is displayed. Below it, the text "Login Account" is followed by the instruction "Enter your username and password". There are two input fields: the first contains the email "CMSSupervisor@unikrew.com", and the second contains masked characters "....." with an eye icon to toggle visibility. A "Forgot Password" link is located below the password field. A blue "Sign In" button is at the bottom.

Assignment/Reassignment (Assignment)

1. Click on 'assignment/reassignment' under the 'collections' tab.



The image shows the CMS Supervisor interface for the "Assignment / Reassignment" section. The top navigation bar includes "Customers", "Products", "Records", "Collections" (selected), "Configuration", and "Identity". The user is logged in as "Hi, CMS Supervisor" with a "CS" profile icon. On the left, there are filters for "Customer Name", "Customer ID", "National ID", "DPD" (a slider from 0 to 390), and "Product" (set to "All"). The main area is titled "Assignment / Reassignment" and contains a table with columns: "ID", "NAME", "PRODUCT", "TO", "IGNED", "DPD (DAYS)", "TOTAL OVER DUE (PKR)", "AMOUNT DUE (PKR)", and "STATUS". Above the table are buttons for "Assign", "Re-Assignment", "Assign to someone", "Import from Excel", and "Export". A red box highlights the "Assignment / Reassignment" title, and a red arrow points to the "Assign" button. The table currently shows "Showing rows 0 to 0 of 0".

2. On the 'assignment/reassignment' page, click on the 'assignment' tab to assign unassigned customers to a user.

Customer Name
Enter Customer Name

Customer ID
Enter Customer ID

National ID
Enter National ID

DPD
0 390

Product
All

Assignment / Re-Assignment **Assignment** Re-Assignment [Assign to someone](#)

<input type="checkbox"/>	NATIONAL ID	NAME	PRODUCT	ASSIGNED TO	DPD (DAYS)	TOTAL OVER DUE (PKR)	AMOUNT DUE (PKR)	STATUS
<input type="checkbox"/>	42401-0831333-1	AADIL ALI	MCB Credit Card Collections	None	6	102,238.20	108,309.99	To be worked
<input type="checkbox"/>	35201-1137802-3	M RIZWAN NASEER	MCB Credit Card Collections	None	6	117,025.51	315,581.78	To be worked
<input type="checkbox"/>	31202-3240066-3	SYED SHAHID	MCB Credit Card Collections	None	7	17,368.78	23,193.78	To be worked
<input type="checkbox"/>	35200-8742700-7	UMER SIDDIQUE	MCB Credit Card Collections	None	188	-	25,140.39	To be worked

3. You can also enter details like customer name, ID, etc., in the filter to find a specific customer.

Customer Name
Enter Customer Name

Customer ID
Enter Customer ID

National ID
Enter National ID

DPD
0 390

Product
All

Strategy
All

Queues
All

Assignment / Re-Assignment **Assignment** Re-Assignment [Assign to someone](#)

<input type="checkbox"/>	NATIONAL ID	NAME	PRODUCT	ASSIGNED TO	DPD (DAYS)	TOTAL OVER DUE (PKR)	AMOUNT DUE (PKR)	STATUS
<input checked="" type="checkbox"/>	42401-0831333-1	AADIL ALI	MCB Credit Card Collections	None	6	102,238.20	108,309.99	To be worked
<input type="checkbox"/>	35201-1137802-3	M RIZWAN NASEER	MCB Credit Card Collections	None	6	117,025.51	315,581.78	To be worked
<input type="checkbox"/>	31202-3240066-3	SYED SHAHID	MCB Credit Card Collections	None	7	17,368.78	23,193.78	To be worked
<input type="checkbox"/>	35200-8742700-7	UMER SIDDIQUE	MCB Credit Card Collections	None	188	-	25,140.39	To be worked
<input type="checkbox"/>	36502-2403464-5	KHURRAM SHAHZAD BUTT	MCB Credit Card Collections	None	5	15,177.66	33,619.16	To be worked
<input type="checkbox"/>	13302-4958816-9	MUHAMMAD JAVED	MCB Credit Card Collections	None	274	107,897.07	123,457.07	To be worked
<input type="checkbox"/>	35201-1588546-1	MUHAMMAD AYAZ	MCB Credit Card Collections	None	123	23,669.66	169,967.95	To be worked
<input type="checkbox"/>	36602-5037480-5	TARIQ HUSSAIN	MCB Credit Card Collections	None	365	7,607.57	66,668.57	To be worked
<input type="checkbox"/>	31202-0309354-5	MUHAMMAD SHOAB AHMAD	MCB Credit Card Collections	None	365	182,767.02	200,982.85	To be worked

4. Select one or multiple customers by ticking the check box.

CASCADE Customers Products Records Reports Workflows Collections Configuration Identity Hi, Ahmed Ali AA

Customer Name
Enter Customer Name

Customer ID
Enter Customer ID

National ID
Enter National ID

DPD
0 390
0 390

Product
All

Assignment / Re-Assignment Assignment Re-Assignment Select User Assign to someone

NATIONAL ID	NAME	PRODUCT	ASSIGNED TO	DPD (DAYS)	TOTAL OVER DUE (PKR)	AMOUNT DUE (PKR)	STATUS
<input checked="" type="checkbox"/> 42401-0831333-1	AADIL ALI	MCB Credit Card Collections	None	6	102,238.20	108,309.99	To be worked
<input type="checkbox"/> 35201-1137802-3	M RIZWAN NASEER	MCB Credit Card Collections	None	6	117,025.51	315,581.78	To be worked
<input type="checkbox"/> 31202-3240066-3	SYED SHAHID	MCB Credit Card Collections	None	7	17,368.78	23,193.78	To be worked
<input type="checkbox"/> 35200-8742700-7	UMER SIDDIQUE	MCB Credit Card Collections	None	188	-	25,140.39	To be worked

5. After selecting a customer, select a user from the drop down menu, then click on the 'assign to someone' button.

CASCADE Customers Products Records Reports Workflows Collections Configuration Identity Hi, Ahmed Ali AA

Customer Name
Enter Customer Name

Customer ID
Enter Customer ID

National ID
Enter National ID

DPD
0 390
0 390

Product
All

Strategy
All

Queues

Assignment / Re-Assignment Assignment Re-Assignment

NATIONAL ID	NAME	PRODUCT	ASSIGNED TO	DPD (DAYS)	TOTAL OVER DUE (PKR)	AMOUNT DUE (PKR)	STATUS
<input checked="" type="checkbox"/> 42401-0831333-1	AADIL ALI	MCB Credit Card Collections	None	6	102,238.20	108,309.99	To be worked
<input type="checkbox"/> 35201-1137802-3	M RIZWAN NASEER	MCB Credit Card Collections	None	6	117,025.51	315,581.78	To be worked
<input type="checkbox"/> 31202-3240066-3	SYED SHAHID	MCB Credit Card Collections	None	7	17,368.78	23,193.78	To be worked
<input type="checkbox"/> 35200-8742700-7	UMER SIDDIQUE	MCB Credit Card Collections	None	188	-	25,140.39	To be worked
<input type="checkbox"/> 36502-2403484-5	KHURRAM SHAHZAD BUTT	MCB Credit Card Collections	None	5	15,177.66	33,619.16	To be worked
<input type="checkbox"/> 13302-4958816-9	MUHAMMAD JAVED	MCB Credit Card Collections	None	274	107,897.07	123,457.07	To be worked
<input type="checkbox"/> 35201-1586546-1	MUHAMMAD AYAZ	MCB Credit Card Collections	None	123	23,669.66	169,967.95	To be worked
<input type="checkbox"/> 36602-5037480-5	TARIQ HUSSAIN	MCB Credit Card Collections	None	365	7,607.57	66,668.57	To be worked

Navveed X

Navveed

Ahmed Ali

Khushbait Ahmed Mirza

Adeel Norani

Muhammad Bilal Rao

Muhammad Sajjad Sarwar

Muhammad Aftab Hanif

Asma Jamal

Muhammad Muneer

Assign to someone

Assignment/Reassignment (Reassignment)

1. Click on 'assignment/reassignment' under the 'collections' tab.

The screenshot shows the Cascade CMS Supervisor interface. The 'Collections' tab is active, and the 'Assignment / Reassignment' sub-tab is highlighted with a red box. The page displays a table with columns: ID, NAME, PRODUCT, TO, ASSIGNED, DPD (DAYS), TOTAL OVER DUE (PKR), AMOUNT DUE (PKR), and STATUS. The table is currently empty, showing 'Showing rows 0 to 0 of 0'.

2. On the 'assignment/reassignment' page, click on the 're-assignment' tab, to reassign already assigned customers to another user.

The screenshot shows the Cascade CMS Supervisor interface. The 'Collections' tab is active, and the 'Assignment / Re-Assignment' sub-tab is highlighted with a red box. The 'Re-Assignment' sub-tab is also highlighted with a red box. The page displays a table with columns: NATIONAL ID, NAME, PRODUCT, ASSIGNED TO, DPD (DAYS), TOTAL OVER DUE (PKR), AMOUNT DUE (PKR), and STATUS. The table contains four rows of data, with the last three rows highlighted by a red box.

NATIONAL ID	NAME	PRODUCT	ASSIGNED TO	DPD (DAYS)	TOTAL OVER DUE (PKR)	AMOUNT DUE (PKR)	STATUS
34101-2967527-9	M ANAS WAQAR	MCB Credit Card Collections	CMS Supervisor	213	490,796.73	575,752.72	Worked
33202-1120017-8	KISHWAR IFTIKHAR	MCB Credit Card Collections	CMS Collector	243	139,073.80	171,141.25	To be worked
35202-6823710-3	KHURRAM PERVEZ	MCB Credit Card Collections	CMS Collector	243	83,367.65	92,489.95	To be worked
31304-8235936-3	IFTIKHAR HUSSAIN	MCB Credit Card Collections	CMS Collector	181	201,870.17	236,065.90	To be worked

3. You can also enter details like customer name, ID, etc., in the filter to find a specific customer.

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

Customer Name
Enter Customer Name

Customer ID
Enter Customer ID

National ID
Enter National ID

DPD
0 390
0 390

Product
All

Strategy

Assignment / Re-Assignment **Assignment** Re-Assignment Re Assign Import from Excel Export

	NATIONAL ID	NAME	PRODUCT	ASSIGNED TO	DPD (DAYS)	TOTAL OVER DUE (PKR)	AMOUNT DUE (PKR)	STATUS
<input type="checkbox"/>	34101-2967527-9	M ANAS WAQAR	MCB Credit Card Collections	CMS Supervisor	213	490,796.73	575,752.72	Worked
<input type="checkbox"/>	33202-1120017-8	KISHWAR IFTIKHAR	MCB Credit Card Collections	CMS Collector	243	139,073.80	171,141.25	To be worked
<input type="checkbox"/>	35202-6823710-3	KHURRAM PERVEZ	MCB Credit Card Collections	CMS Collector	243	83,367.65	92,489.95	To be worked
<input type="checkbox"/>	31304-8235936-3	IFTIKHAR HUSSAIN	MCB Credit Card Collections	CMS Collector	181	201,870.17	236,065.90	To be worked

10 Showing rows 1 to 4 of 4

4. On the right side, you can see the current status of each customer. 'Worked' indicating that work has been done on this customer. 'To be worked' indicating, that there is work pending.

Assignment / Re-Assignment **Assignment** Re-Assignment Re Assign Import from Excel Export

	NATIONAL ID	NAME	PRODUCT	ASSIGNED TO	DPD (DAYS)	TOTAL OVER DUE (PKR)	AMOUNT DUE (PKR)	STATUS
<input type="checkbox"/>	34101-2967527-9	M ANAS WAQAR	MCB Credit Card Collections	CMS Supervisor	213	490,796.73	575,752.72	Worked
<input type="checkbox"/>	33202-1120017-8	KISHWAR IFTIKHAR	MCB Credit Card Collections	CMS Collector	243	139,073.80	171,141.25	To be worked
<input type="checkbox"/>	35202-6823710-3	KHURRAM PERVEZ	MCB Credit Card Collections	CMS Collector	243	83,367.65	92,489.95	To be worked
<input type="checkbox"/>	31304-8235936-3	IFTIKHAR HUSSAIN	MCB Credit Card Collections	CMS Collector	181	201,870.17	236,065.90	To be worked

10 Showing rows 1 to 4 of 4

5. Select a customer by checking the tick box next to it.

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

Customer Name
Enter Customer Name

Customer ID
Enter Customer ID

National ID
Enter National ID

DPD
0 390
0 390

Product
All

Strategy

Assignment / Re-Assignment **Assignment** Re-Assignment

Select User ☐ ☒ Re Assign Import from Excel Export

<input type="checkbox"/>	NATIONAL ID	NAME	PRODUCT	ASSIGNED TO	DPD (DAYS)	TOTAL OVER DUE (PKR)	AMOUNT DUE (PKR)	STATUS
<input type="checkbox"/>	34101-2967527-9	M ANAS WAQAR	MCB Credit Card Collections	CMS Supervisor	213	490,796.73	575,752.72	Worked
<input checked="" type="checkbox"/>	33202-1120017-8	KISHWAR IFTIKHAR	MCB Credit Card Collections	CMS Collector	243	139,073.80	171,141.25	To be worked
<input checked="" type="checkbox"/>	35202-6823710-3	KHURRAM PERVEZ	MCB Credit Card Collections	CMS Collector	243	83,367.65	92,489.95	To be worked
<input type="checkbox"/>	31304-8235936-3	IFTIKHAR HUSSAIN	MCB Credit Card Collections	CMS Collector	181	201,870.17	236,065.90	To be worked

6. After selecting a customer, select a user you want the customers to be assigned to.

CE Customers Products Records **Collections** Configuration Identity Hi, CMS Supervisor CS

Name
Customer Name

ID
Customer ID

N
National ID

DPD
0 390
0 390

Product
All

Assignment / Re-Assignment **Assignment** Re-Assignment

Select User ☐ ☒ Re Assign Import from Excel Export

Faisal Mansoor 2
Faisal Mansoor
CMS Supervisor
CMS Collector
Sameen Ali
Mudasar Majeed
Syed SAAD Bacha
Muhammad weqar

<input type="checkbox"/>	NATIONAL ID	NAME	PRODUCT	ASSIGNED TO	DPD (DAYS)	TOTAL OVER DUE (PKR)	AMOUNT DUE (PKR)	STATUS
<input type="checkbox"/>	34101-2967527-9	M ANAS WAQAR	MCB Credit Card Collections	CMS Supervisor	213	490,796.73	575,752.72	Worked
<input checked="" type="checkbox"/>	33202-1120017-8	KISHWAR IFTIKHAR	MCB Credit Card Collections	CMS Collector	243	139,073.80	171,141.25	To be worked
<input checked="" type="checkbox"/>	35202-6823710-3	KHURRAM PERVEZ	MCB Credit Card Collections	CMS Collector	243	83,367.65	92,489.95	To be worked
<input type="checkbox"/>	31304-8235936-3	IFTIKHAR HUSSAIN	MCB Credit Card Collections	CMS Collector	181	201,870.17	236,065.90	To be worked

7. After selecting a user, click on the 're-assign' button.

Products Records **Collections** Configuration Identity

Hi, CMS Supervisor CS

Assignment / Re-Assignment **Assignment** Re-Assignment

CMS Collector X **Re Assign** Import from Excel Export

	NATIONAL ID	NAME	PRODUCT	ASSIGNED TO	DPD (DAYS)	TOTAL OVER DUE (PKR)	AMOUNT DUE (PKR)	STATUS
<input type="checkbox"/>	34101-2967527-9	M ANAS WAQAR	MCB Credit Card Collections	CMS Supervisor	213	490,796.73	575,752.72	Worked
<input checked="" type="checkbox"/>	33202-1120017-8	KISHWAR IFTIKHAR	MCB Credit Card Collections	CMS Collector	243	139,073.80	171,141.25	To be worked
<input checked="" type="checkbox"/>	35202-6823710-3	KHURRAM PERVEZ	MCB Credit Card Collections	CMS Collector	243	83,367.65	92,489.95	To be worked
<input type="checkbox"/>	31304-8235936-3	IFTIKHAR HUSSAIN	MCB Credit Card Collections	CMS Collector	181	201,870.17	236,065.90	To be worked

11. The selected customers will now be reassigned. You can also see the names of the users that the customers have been assigned to.

Products Records **Collect**

Selected account(s) have been Re assigned successfully. X

Hi, CMS Supervisor CS

Assignment / Re-Assignment **Assignment** Re-Assignment **Re Assign** Import from Excel Export

	NATIONAL ID	NAME	PRODUCT	ASSIGNED TO	DPD (DAYS)	TOTAL OVER DUE (PKR)	AMOUNT DUE (PKR)	STATUS
<input type="checkbox"/>	34101-2967527-9	M ANAS WAQAR	MCB Credit Card Collections	CMS Supervisor	213	490,796.73	575,752.72	Worked
<input type="checkbox"/>	33202-1120017-8	KISHWAR IFTIKHAR	MCB Credit Card Collections	CMS Collector	243	139,073.80	171,141.25	To be worked
<input type="checkbox"/>	35202-6823710-3	KHURRAM PERVEZ	MCB Credit Card Collections	CMS Collector	243	83,367.65	92,489.95	To be worked
<input type="checkbox"/>	31304-8235936-3	IFTIKHAR HUSSAIN	MCB Credit Card Collections	CMS Collector	181	201,870.17	236,065.90	To be worked

10 Showing rows 1 to 4 of 4

Assignment/Reassignment (Exporting)

1. You can also export all the data to a PDF file or an Excel File. Click on 'Excel' to export it to an excel file, on 'PDF' to export the data to a PDF file or click on 'copy' to copy all the data. Clicking on your preferred option will download the file to your computer.

Customer Name
Enter Customer Name

Customer ID
Enter Customer ID

National ID
Enter National ID

DPD
0 390

Product
All

Strategy

Assignment / Re-Assignment **Assignment** **Re-Assignment** **Re Assign** **Import from Excel** **Export**

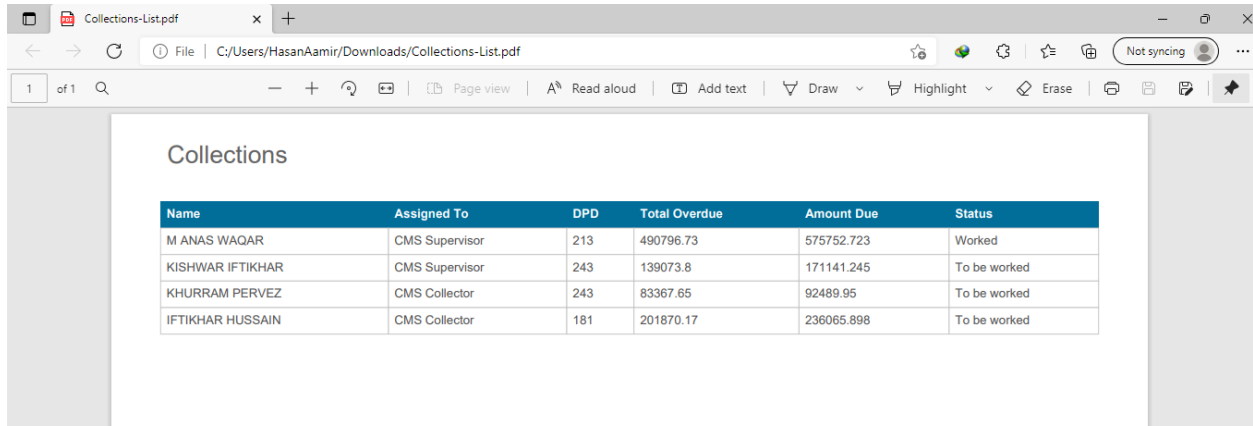
NATIONAL ID	NAME	PRODUCT	ASSIGNED TO	DPD (DAYS)	TOTAL OVER DUE (PKR)	AMOUNT DUE (PKR)	STATUS
34101-2967527-9	M ANAS WAQAR	MCB Credit Card Collections	CMS Supervisor	213	490,796.73	575,752.72	To be worked
33202-1120017-8	KISHWAR IFTIKHAR	MCB Credit Card Collections	CMS Supervisor	243	139,073.80	171,141.25	To be worked
35202-6823710-3	KHURRAM PERVEZ	MCB Credit Card Collections	CMS Collector	243	83,367.65	92,489.95	To be worked
31304-8235936-3	IFTIKHAR HUSSAIN	MCB Credit Card Collections	CMS Collector	181	201,870.17	236,065.90	To be worked

10 Showing rows 1 to 4 of 4

Sample File (Excel)

Accountid	Name	Assigned To	DPD	Total Overdue	Amount Due	Status
8f871234-bc12-468f-ac46-786fe1333206	M ANAS WAQAR	9446acaf-7c17-4677-a535-c549d5c721f5	213	490796.73	575752.723	1
7bc06e5d-e8c5-48f4-bfc7-47773b9d01a6	KISHWAR IFTIKHAR	171434d3-dae0-459b-abc6-af36c30443d3	243	139073.8	171141.245	0
dc90324f-2a0c-471f-a4f4-f2880655d5fc	KHURRAM PERVEZ	171434d3-dae0-459b-abc6-af36c30443d3	243	83367.65	92489.95	0
f624cb4a-abe9-4583-9bc0-fe99edc79123	IFTIKHAR HUSSAIN	171434d3-dae0-459b-abc6-af36c30443d3	181	201870.17	236065.898	0

Sample File (PDF)

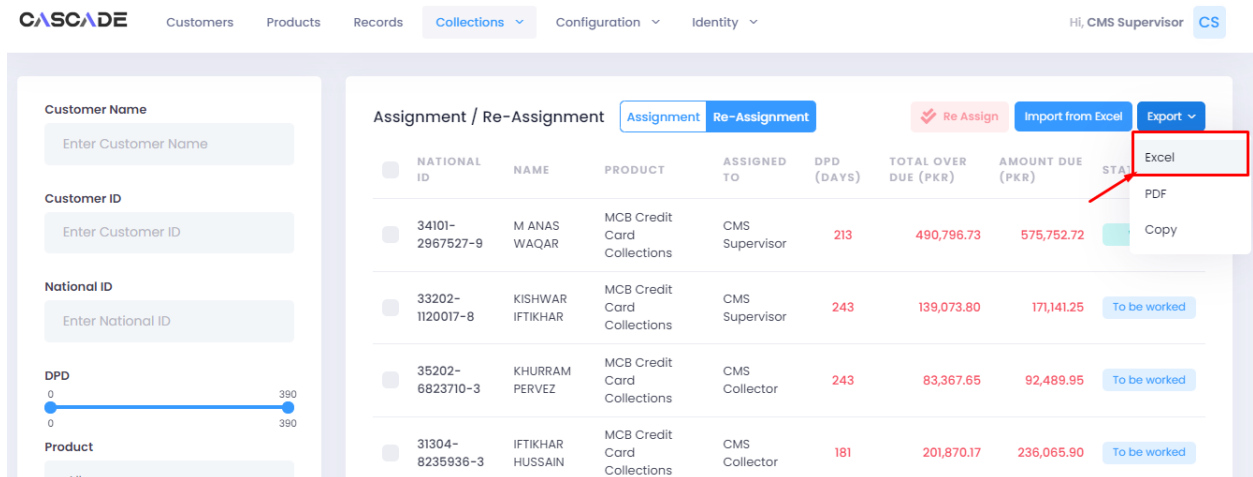


The screenshot shows a PDF viewer window with the title bar 'Collections-List.pdf'. The address bar shows the file path 'C:/Users/HasanAamir/Downloads/Collections-List.pdf'. The PDF content displays a table titled 'Collections' with the following data:

Name	Assigned To	DPD	Total Overdue	Amount Due	Status
M ANAS WAQAR	CMS Supervisor	213	490796.73	575752.723	Worked
KISHWAR IFTIKHAR	CMS Supervisor	243	139073.8	171141.245	To be worked
KHURRAM PERVEZ	CMS Collector	243	83367.65	92489.95	To be worked
IFTIKHAR HUSSAIN	CMS Collector	181	201870.17	236065.898	To be worked

Re-assignment Using Excel

1. You can also re-assign customer accounts in bulk using excel. Click on 'excel' to download all the data in excel format.



The screenshot shows the CASCADE Collections management interface. The top navigation bar includes 'Customers', 'Products', 'Records', 'Collections' (selected), 'Configuration', and 'Identity'. The user is logged in as 'Hi, CMS Supervisor' with a 'CS' status. On the left, there are input fields for 'Customer Name', 'Customer ID', and 'National ID', along with a 'DPD' slider and a 'Product' dropdown set to 'All'. The main area is titled 'Assignment / Re-Assignment' and has tabs for 'Assignment' and 'Re-Assignment'. Below these tabs is a table with columns: NATIONAL ID, NAME, PRODUCT, ASSIGNED TO, DPD (DAYS), TOTAL OVER DUE (PKR), AMOUNT DUE (PKR), and STATUS. The table contains four rows of data. To the right of the table, there are buttons for 'Re Assign', 'Import from Excel', and 'Export'. The 'Export' button is highlighted with a red box, and a dropdown menu is open showing options: 'Excel', 'PDF', and 'Copy'.

NATIONAL ID	NAME	PRODUCT	ASSIGNED TO	DPD (DAYS)	TOTAL OVER DUE (PKR)	AMOUNT DUE (PKR)	STATUS
34101-2967527-9	M ANAS WAQAR	MCB Credit Card Collections	CMS Supervisor	213	490,796.73	575,752.72	Worked
33202-1120017-8	KISHWAR IFTIKHAR	MCB Credit Card Collections	CMS Supervisor	243	139,073.80	171,141.25	To be worked
35202-6823710-3	KHURRAM PERVEZ	MCB Credit Card Collections	CMS Collector	243	83,367.65	92,489.95	To be worked
31304-8235936-3	IFTIKHAR HUSSAIN	MCB Credit Card Collections	CMS Collector	181	201,870.17	236,065.90	To be worked

2. Click on 'import to excel'.

Records Collections Configuration Identity Hi, CMS Supervisor CS

Assignment / Re-Assignment Assignment Re-Assignment Re Assign Import from Excel Export

	NATIONAL ID	NAME	PRODUCT	ASSIGNED TO	DPD (DAYS)	TOTAL OVER DUE (PKR)	AMOUNT DUE (PKR)	STATUS
<input type="checkbox"/>	34101-2967527-9	M ANAS WAQAR	MCB Credit Card Collections	CMS Supervisor	213	490,796.73	575,752.72	Worked
<input type="checkbox"/>	33202-1120017-8	KISHWAR IFTIKHAR	MCB Credit Card Collections	CMS Supervisor	243	139,073.80	171,141.25	To be worked
<input type="checkbox"/>	35202-6823710-3	KHURRAM PERVEZ	MCB Credit Card Collections	CMS Collector	243	83,367.65	92,489.95	To be worked
<input type="checkbox"/>	31304-8235936-3	IFTIKHAR HUSSAIN	MCB Credit Card Collections	CMS Collector	181	201,870.17	236,065.90	To be worked

3. Select the user you want to reassign the customer accounts to. Then click on import.

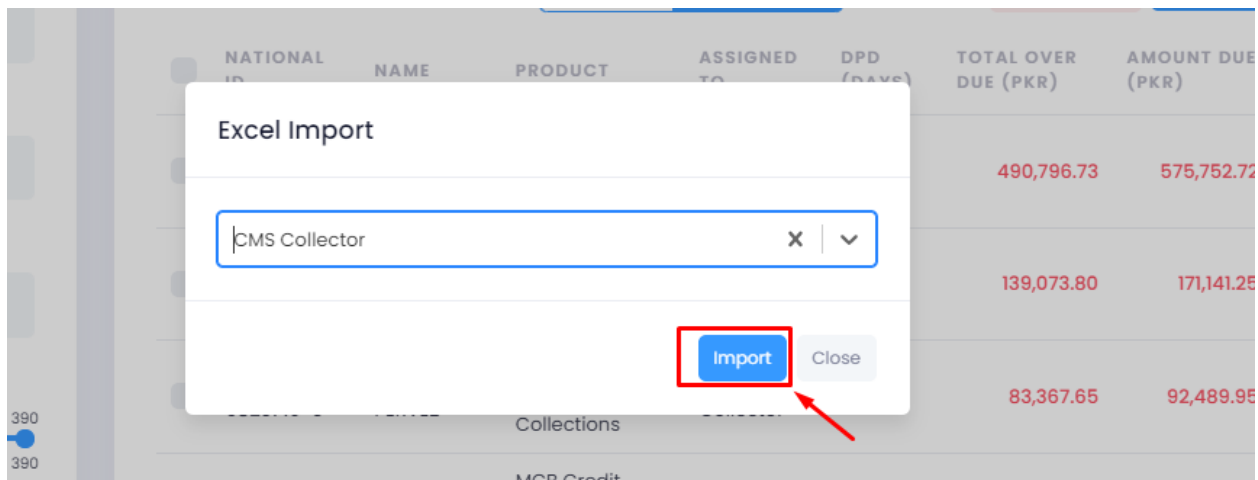
Assignment / Re-Assignment Assignment Re-Assignment Re Assign

Excel Import

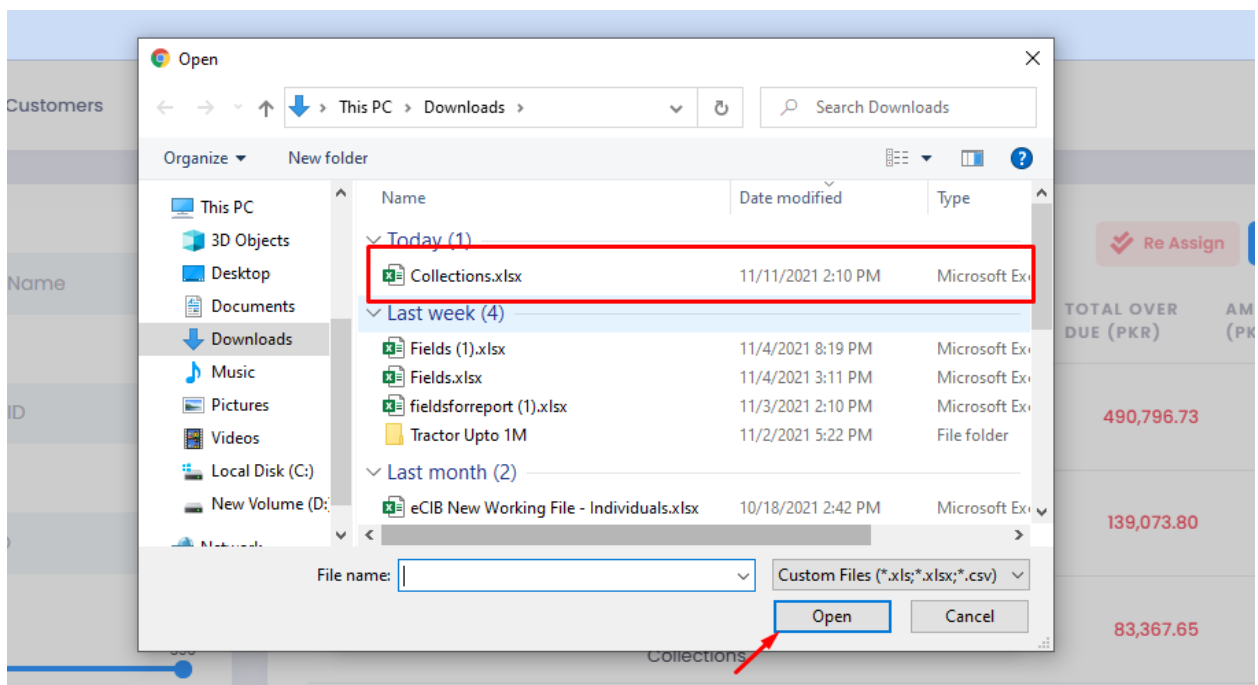
Select User

- Faisal Mansoor 2
- Faisal Mansoor
- CMS Supervisor
- CMS Collector
- Sameen Ali
- Mudasar Majeed

NATIONAL ID	NAME	PRODUCT	ASSIGNED TO	DPD (DAYS)	TOTAL OVER DUE (PKR)
					490,796.73
					139,073.80
					83,367.65
				81	201,870.17



4. Select the previously downloaded excel file from your computer. Then click on open.



5. All accounts will now be reassigned to the selected user.

CASCADE

CustomersProductsRecordsCollect

Hi, CMS SupervisorCS

Selected account(s) have been Re assigned successfully.

Customer Name

Enter Customer Name

Customer ID

Enter Customer ID

National ID

Enter National ID

DPD

0390

0390

Product

Assignment / Re-Assignment

AssignmentRe-Assignment

Re AssignImport from ExcelExport

	NATIONAL ID	NAME	PRODUCT	ASSIGNED TO	DPD (DAYS)	TOTAL OVER DUE (PKR)	AMOUNT DUE (PKR)	STATUS
<input type="checkbox"/>	34101-2987527-9	M ANAS WAQAR	MCB Credit Card Collections	CMS Collector	213	490,796.73	575,752.72	Worked
<input type="checkbox"/>	33202-1120017-8	KISHWAR IFTIKHAR	MCB Credit Card Collections	CMS Collector	243	139,073.80	171,141.25	To be worked
<input type="checkbox"/>	35202-6823710-3	KHURRAM PERVEZ	MCB Credit Card Collections	CMS Collector	243	83,367.65	92,489.95	To be worked
<input type="checkbox"/>	31304-8235036-2	IFTIKHAR HUSSAIN	MCB Credit Card Collections	CMS Collector	181	201,870.17	236,065.90	To be worked

CMS Collector

Accounts

1. Click on the 'accounts' tab to access accounts.

The screenshot shows the 'Accounts' tab selected in the CMS Collector interface. The left sidebar contains filters for Customer Name, Customer ID, National ID, DPD, Product, Strategy, and Queues. The main area displays a table of accounts assigned to the current user.

NATIONAL ID	NAME	PRODUCT	DPD (DAYS)	TOTAL OVER DUE (PKR)	AMOUNT DUE (PKR)	STATUS
34101-2967527-9	M ANAS WAQAR	MCB Credit Card Collections	213	490,796.73	575,752.72	Worked
33202-1120017-8	KISHWAR IFTIKHAR	MCB Credit Card Collections	243	139,073.80	171,141.25	To be worked
35202-6823710-3	KHURRAM PERVEZ	MCB Credit Card Collections	243	83,367.65	92,489.95	To be worked
31304-8235936-3	IFTIKHAR HUSSAIN	MCB Credit Card Collections	181	201,870.17	236,065.90	To be worked

2. Here you will see all the customer accounts assigned to current user.

This screenshot is identical to the one above, showing the 'Accounts' tab with a list of customer accounts assigned to the current user. The table contains the same data as the previous screenshot.

NATIONAL ID	NAME	PRODUCT	DPD (DAYS)	TOTAL OVER DUE (PKR)	AMOUNT DUE (PKR)	STATUS
34101-2967527-9	M ANAS WAQAR	MCB Credit Card Collections	213	490,796.73	575,752.72	Worked
33202-1120017-8	KISHWAR IFTIKHAR	MCB Credit Card Collections	243	139,073.80	171,141.25	To be worked
35202-6823710-3	KHURRAM PERVEZ	MCB Credit Card Collections	243	83,367.65	92,489.95	To be worked
31304-8235936-3	IFTIKHAR HUSSAIN	MCB Credit Card Collections	181	201,870.17	236,065.90	To be worked

3. You can also enter details like customer name, ID, etc., in the filter to find a specific customer.

CASCADE Accounts Customers H, CMS Collector CC

Customer Name
Enter Customer Name

Customer ID
Enter Customer ID

National ID
Enter National ID

DPD
0 390

Product
All

Strategy
All

Queues
All

Status

Accounts Assigned Unassigned Export Reports

NATIONAL ID	NAME	PRODUCT	DPD (DAYS)	TOTAL OVER DUE (PKR)	AMOUNT DUE (PKR)	STATUS
34101-2967527-9	M ANAS WAQAR	MCB Credit Card Collections	213	490,796.73	575,752.72	Worked
33202-1120017-8	KISHWAR IFTIKHAR	MCB Credit Card Collections	243	139,073.80	171,141.25	To be worked
35202-6823710-3	KHURRAM PERVEZ	MCB Credit Card Collections	243	83,367.65	92,489.95	To be worked
31304-8235936-3	IFTIKHAR HUSSAIN	MCB Credit Card Collections	181	201,870.17	236,065.90	To be worked

10 Showing rows 1 to 4 of 4

4. Click on the 'National ID' of any customer to view the details of that customer.

CASCADE Accounts Customers H, CMS Collector CC

Customer Name
Enter Customer Name

Customer ID
Enter Customer ID

National ID
Enter National ID

DPD
0 390

Product
All

Strategy
All

Accounts Assigned Unassigned Export Reports

NATIONAL ID	NAME	PRODUCT	DPD (DAYS)	TOTAL OVER DUE (PKR)	AMOUNT DUE (PKR)	STATUS
34101-2967527-9	M ANAS WAQAR	MCB Credit Card Collections	213	490,796.73	575,752.72	Worked
33202-1120017-8	KISHWAR IFTIKHAR	MCB Credit Card Collections	243	139,073.80	171,141.25	To be worked
35202-6823710-3	KHURRAM PERVEZ	MCB Credit Card Collections	243	83,367.65	92,489.95	To be worked
31304-8235936-3	IFTIKHAR HUSSAIN	MCB Credit Card Collections	181	201,870.17	236,065.90	To be worked

10 Showing rows 1 to 4 of 4

5. You will now see a dashboard like interface showing vital information about the customer.

1. Shows basic customer info.
2. Shows payments details of the customer.
3. Shows the stance of the customer.

CASCADE Accounts Customers Hi, CMS Collector CC

M ANAS WAQAR Worked
Card Customer ID: 000000000000006443
National ID: 34101-2967527-9

Minimum Payment PKR 575,752.72	Total Over Due PKR 490,796.73	Bucket Partial PKR 33,422.40	Last Payment Amount PKR 0.00
Amount Due PKR 575,752.72	Payment Due Date 6th September 2021	DPD 213 Days	Last Payment Date 13th Jul 2020

None
Supplementary Cards

VISA GOLD CARDS
Scheme

BASIC
Card Indicator

RESTRICT
Card Status

Default
Queue

Recovery
Strategy

Activity Log
Please select **Action** (How you tried to connect with the customer?)

Overview
Demographic, Contact, References

Memo
Memo from Card Zone

Statements
Card statements & customers payments

Installment Plan
With Paid & UnPaid Installments

Supplementary Cards

Age
AGE 8
Email Address

Date of Birth
-

Marital Status
Married

Designation
-
Cycle Cut
15

Customer Category
BCS

Joining Date
26th Jun 2018

Assigned Credit Limit
PKR 350,000.00

Credit Card Expiry Date
Nov 2022

Fee Due
PKR 84,956.00

Main Mobile
923082456616

Main Phone Number
923082456616

Work Mobile
923082456616

Markup Over Due
PKR 145,234.13

Principle Over Due
PKR 345,562.60

NPL Date
15th Jul 2021

Work Phone Number
/

Fax Number
/

Home Mobile
923082456616

NPL Age
7

NPL Count
1

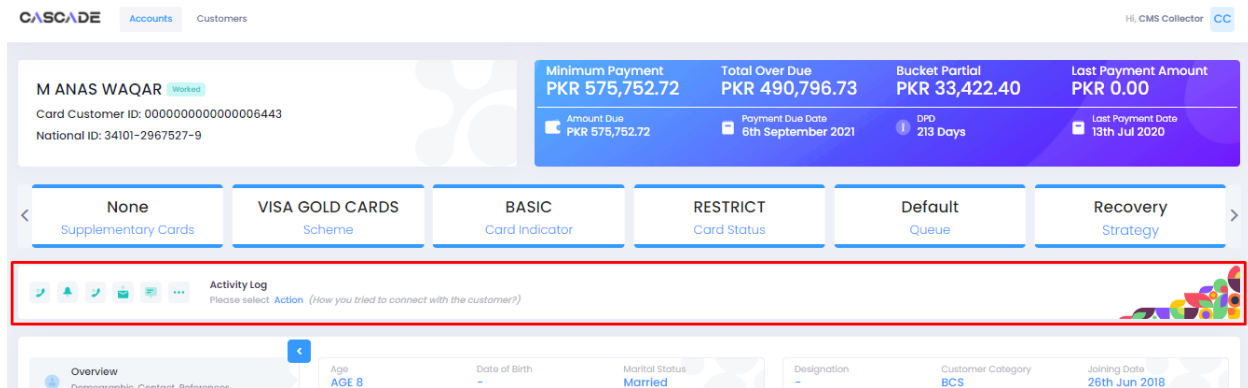
Home Phone Number
/

Over 1 Month Overdue

Current Month Overdue

Third Month Overdue

6. The 'activity log' allows you to quickly describe the last action taken on the customer.



CASCADE Accounts Customers H. CMS Collector CC

M ANAS WAQAR Worked
Card Customer ID: 00000000000000006443
National ID: 34101-2967527-9

Minimum Payment: **PKR 575,752.72**
Total Over Due: **PKR 490,796.73**
Bucket Partial: **PKR 33,422.40**
Last Payment Amount: **PKR 0.00**

Amount Due: **PKR 575,752.72**
Payment Due Date: **6th September 2021**
DPO: **213 Days**
Last Payment Date: **13th Jul 2020**

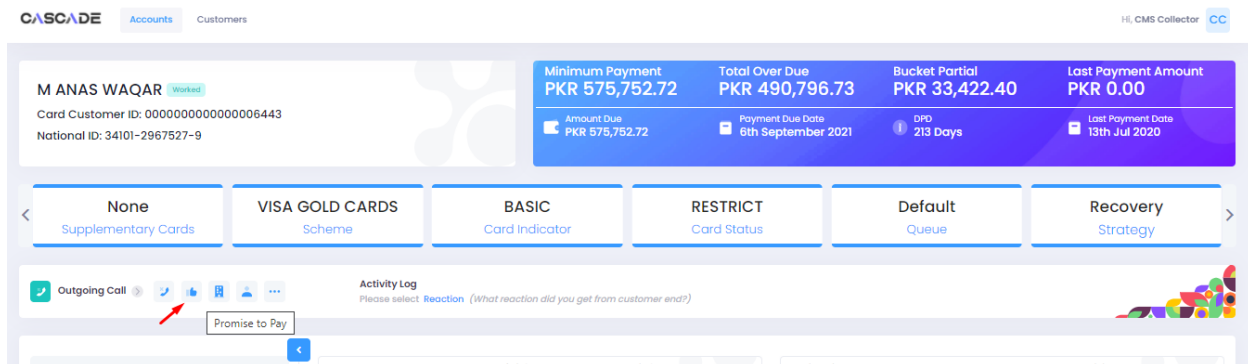
None **VISA GOLD CARDS** **BASIC** **RESTRICT** **Default** **Recovery**
Supplementary Cards Scheme Card Indicator Card Status Queue Strategy

Activity Log
Please select **Action** (How you tried to connect with the customer?)

Overview Demographic Contact References
Age: **AGE 8** Date of Birth: - Marital Status: **Married** Designation: - Customer Category: **BCS** Joining Date: **26th Jun 2018**

For example, we can select 'outgoing call' to notify that the customer was given a phone call and then select a reaction based on the outcome of the call, e.g., 'promise to pay'.

Other actions include, 'incoming call, sent email, sent SMS, visited office, etc.'. With reactions like, 'unreachable, number disconnected, number busy, talked to spouse, etc.'.



CASCADE Accounts Customers H. CMS Collector CC

M ANAS WAQAR Worked
Card Customer ID: 00000000000000006443
National ID: 34101-2967527-9

Minimum Payment: **PKR 575,752.72**
Total Over Due: **PKR 490,796.73**
Bucket Partial: **PKR 33,422.40**
Last Payment Amount: **PKR 0.00**

Amount Due: **PKR 575,752.72**
Payment Due Date: **6th September 2021**
DPO: **213 Days**
Last Payment Date: **13th Jul 2020**

None **VISA GOLD CARDS** **BASIC** **RESTRICT** **Default** **Recovery**
Supplementary Cards Scheme Card Indicator Card Status Queue Strategy

Outgoing Call **Activity Log**
Please select **Reaction** (What reaction did you get from customer end?)
Promise to Pay

Overview Demographic Contact References
Age: **AGE 8** Date of Birth: - Marital Status: **Married** Designation: - Customer Category: **BCS** Joining Date: **26th Jun 2018**

7. On the left side of the page, there's a panel with different tabs that you can click to view specific information.

Overview shows basic information about the customer.

The Overview tab displays a comprehensive profile of a customer. On the left, a sidebar lists various sections: Overview (selected), Memo, Statements, Installment Plan, Supplementary Cards, Linked Accounts, History, and Reports. The main content area is divided into several sections. The top section shows basic demographics: Age 8, Date of Birth, Marital Status Married, Designation, Customer Category BCS, and Joining Date 26th Jun 2018. Below this, a table provides financial details: Assigned Credit Limit (PKR 350,000.00), Credit Card Expiry Date (Nov 2022), Fee Due (PKR 84,956.00), Main Mobile (923082456616), Main Phone Number (923082456616), and Work Mobile (923082456616). Further down, another table lists installment details: First Month Partial (PKR 135,013.18), Second Month Partial (PKR 27,807.14), Third Month Partial (PKR 27,022.41), Fourth Month Partial (PKR 309,879.77), Fifth Month Partial (PKR 35,725.84), and Sixth Month Partial (PKR 33,422.40). At the bottom, a blue box contains the Main Address (MB PARK SATELLITE TOWNBLOCK D), Home Address (MB PARK SATELLITE TOWNBLOCK D), and Work Address (ANAS TRADERSMB PARK SATELLITE TOWNBLOCK D).

Memo shows notes left by agents about their previous interactions with the customer.

The Memo tab displays a list of interactions between the customer and agents. The left sidebar is the same as in the Overview tab, with the Memo section selected. The main content area shows a table of interactions with columns: CASE ID, CASE DTL AGS USER ID, MOD DATE, CASE TYPE, CASE STATUS, and CASE PRIORITY. The table contains five entries, each with a detailed description of the interaction. For example, the first entry (CASE ID 1825445) describes a first time visit to the customer's residence address with Sir Naveed Sahib, where the customer did not attend the call, leaving a message to the guard. The second entry (CASE ID 1808299) describes a settled account, but the customer did not pay the amount, and the settlement will be void. The third entry (CASE ID 1827406) describes a visit to the customer's home with Sir Naveed Sahib, where the customer did not pick up the call transfer to home, but did pick up the call on the cell phone and on WhatsApp. The fourth entry (CASE ID 1825453) describes a visit to the customer's home with Sir Naveed Sahib, where the customer did not pick up the call transfer to home, but did pick up the call on the cell phone and on WhatsApp.

Statements shows the history of card statements issued and payments by customers.

The Statements tab displays a table of card statements issued and payments by customers. The left sidebar is the same as in the Overview tab, with the Statements section selected. The main content area shows a table with columns: DUE DATE, STATEMENT DATE, STATEMENT MONTH, BILLING START DATE, NEXT STATEMENT DATE, DUE MINIMUM PAYMENT, BILLING CYCLE, OPENING BALANCE, and CLOSING BALANCE. The table contains ten entries, showing the history of statements issued and payments made by the customer. For example, the first entry (DUE DATE 6th Sep 2021) shows a statement issued on 15th Aug 2021, with a due minimum payment of 0 PKR and a closing balance of 575752.72 PKR.

Installment Plan shows the current installment plans with paid and unpaid installments.

Overview Demographic, Contact, References	
Memo Memo from Card Zone	
Statements Card statements & customers payments	
Installment Plan With Paid & UnPaid Installments	
Supplementary Cards Supplementary cards of customer	
Linked Accounts Linked account of customer	
History Previous interactions with agents	
Reports Available reports & dunning letters	

CARD PRODUCT PLAN	PLAN ID	STATUS	INSTALLMENT NUMBER	NUMBER TO DATE	CAPTURE DATE	PROCESSING DATE	START DATE	END DATE
COVID 19 18% INST PRINCIPAL WITH MARKUP	CDNR1812M	X	12	3	14th Jan 2021	18th Mar 2021	14th Feb 2021	17th Mar 2021
SERVICE FEE MARKUP 0% FOR 12M	CDMP_R0T12	X	12	3	14th Jan 2021	18th Mar 2021	14th Feb 2021	17th Mar 2021
COVID 19 0% MARKUP & FEE 12M	CDNR012M	X	12	3	14th Jan 2021	18th Mar 2021	14th Feb 2021	17th Mar 2021
COVID 19 18% INST PRINCIPAL WITH MARKUP	CDNR1812M	X	12	8	10th Jun 2020	13th Jan 2021	10th Jul 2020	12th Jan 2021
I-PLAN M36T06	105_R36T6	C	6	6	30th Sep 2019	31st Mar 2020	30th Oct 2019	30th Mar 2020
I-DIAL M36T06	DAL_R36T6	C	6	6	13th May 2019	14th Nov 2019	13th Jun 2019	13th Nov 2019
I-PLAN M36T03	105_R36T3	C	3	3	11th Dec 2018	12th Mar 2019	11th Jan 2019	11th Mar 2019
I-PLAN M36T03	105_R36T3	C	3	3	2nd Aug 2018	4th Nov 2018	3rd Sep 2018	3rd Nov 2018
I-PLAN M36T03	105_R36T3	C	3	3	6th Jul 2018	7th Oct 2018	6th Aug 2018	6th Oct 2018

Supplementary Cards shows the details of supplementary cards issued (if any).

Overview Demographic, Contact, References	
Memo Memo from Card Zone	
Statements Card statements & customers payments	
Installment Plan With Paid & UnPaid Installments	
Supplementary Cards Supplementary cards of customer	
Linked Accounts Linked account of customer	
History Previous interactions with agents	
Reports Available reports & dunning letters	

MALIK KHADIM HUSSAIN
Join Date: 12th Feb 2018
Card Scheme: VISA GOLD CARDS
Card Indicator: SUPPLEMENTARY
Card Status: BLOCK

Linked Accounts shows linked accounts of customer (if any)

Overview Demographic, Contact, References	
Memo Memo from Card Zone	
Statements Card statements & customers payments	
Installment Plan With Paid & UnPaid Installments	
Supplementary Cards Supplementary cards of customer	
Linked Accounts Linked account of customer	
History Previous interactions with agents	
Reports Available reports & dunning letters	

Balance 0.0	Account number	Account number	Account Title
Currency PKR			AMAD SOHAIL

History shows the history previous interactions with the customer.

History
Previous interactions with agents

Date	Time	Action	Agent	Status	Comments
4th Oct 2021	05:20 PM	Make a Reminder	(Junaid Mashar)	Unreachable	Comments (123123)
4th Oct 2021	06:16 PM	Make a Reminder	(Junaid Mashar)	Unreachable	Comments (good)
4th Oct 2021	07:15 PM	Make a Reminder	(Ahmed Ali)	Unreachable	Comments (good)
13th Oct 2021	10:30 AM	Make a Reminder	(Junaid Mashar)	Unreachable	Comments (12313)
13th Oct 2021	06:16 PM	Incoming Call	(Junaid Mashar)	Unreachable	Comments (wqeqwe)
13th Oct 2021	06:24 PM	Sent Email	(Junaid Mashar)	Promise to Pay (PKR 123.00)	Comments (12312)
10th Nov 2021	01:04 PM	Outgoing Call	(CMT Collector)	Unreachable	Comments (Couldnt contact)
10th Nov 2021	01:04 PM	Outgoing Call	(CMT Collector)	Visit Required	Comments (ok)

Reports allows you to generate reports and dunning letters such as reminder letters.

Reports
Available reports & dunning letters

Credit Card Reminder Letter 1
MCB_Credit_Card_Reminder1_1

GENERATE

Credit Card Reminder Letter 3
Credit Card Reminder 3

GENERATE

Credit Card Reminder Letter 2
CreditCardReminderLetter2

GENERATE

Customers

1. Under the 'customers' tab, you can see the list of all customers with their details.

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

Customers

NATIONAL ID	CUSTOMER ID	EMAIL ADDRESS	DATE OF BIRTH	MAIN ADDRESS
<input type="text" value="Enter National ID..."/>	<input type="text" value="Enter Customer id..."/>			
31304-8235936-3	000000000000005846	---	-	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	0000000000000028137	---	-	THE CITY SCHOOL BWP
36301-3679309-1	0000000000000024550	---	-	GOVT HIGHER SECONDARY SCHOOL JALALPUR PIRWALADIST MTN
35202-1276506-5	0000000000000021729	MBILAL4CREDITCARD@GMAIL.COM	12th Feb 1987	H#77 GULSHAN COLONY STREET 11 FURNITURE MARKET NEAR SHAHZAN FACTORY BAND ROAD

2. Click on the 'national id' of any customer to view their full profile.

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

Customers

NATIONAL ID	CUSTOMER ID	EMAIL ADDRESS	DATE OF BIRTH	MAIN ADDRESS
<input type="text" value="Enter National ID..."/>	<input type="text" value="Enter Customer id..."/>			
31304-8235936-3	000000000000005846	---	-	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	0000000000000028137	---	-	THE CITY SCHOOL BWP

Relations

CARD NUMBER	NAME	CUSTOMER ID	CARD INDICATOR
C8286C6B5597E76CE8804597A71BD488E20F1BF6C4A49776	KISHWAR IFTIKHAR	146836	BASIC

10 Showing rows 1 to 1 of 1

3. You will now see a dashboard with all the details of the selected customer.

CASCADE

CustomersProductsRecordsCollectionsConfigurationIdentity

Hi, CMS SupervisorCS

KISHWAR IFTIKHAR

To be Worked

Card Customer ID: 146836

National ID: 33202-1120017-8

Minimum Payment

PKR 171,141.25

Total Over Due

PKR 139,073.80

Bucket Partial

PKR 28,443.29

Last Payment Amount

PKR 0.00

Amount Due

PKR 171,141.25

Payment Due Date

6th September 2021

DPD

243 Days

Last Payment Date

29th Apr 2021

None

Supplementary Cards

VISA GOLD CARDS

Scheme

BASIC

Card Indicator

RESTRICT

Card Status

Default

Queue

Recovery

Strategy

Activity Log

Please select **Action** (How you tried to connect with the customer?)

Overview

<

Age

Date of Birth

Marital Status

Designation

Customer

Joining Date