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## New General Flow

Look and feel

- Red and white. Dominant white

3 users

1. Agent
2. Supervisor
3. admin

Agent

1. sees accounts assigned to him
2. accounts can be arranged by banks, location
3. places inputs on current analytics (see123.txt)
4. provide ptp by 9am
5. Update status of ptp placed

Supervisor

1. sees all accounts
2. accounts can be arranged by Agent holder
3. places comments on current analytics (see123.txt) placed by agent

Admin

1. can view, add, remove: all accounts, all banks, all employees. via encoding or importing
2. can view analytics
3. can assign accounts to agents?

Analytics

1. success rate:
  - a. grouped by: banks, location
  - b. filtered by: year, month, day
2. Performance
  - a. grouped by; bank, location
  - b. and total performance
  - c. ptp prediction accuracy

Other notes:

- address and area:a
  - address is complete address, area is general area get LongLat
- only agent can view contact infos unless explicitly placed by supervisor/admin
- SENT BY BANK to CONVERGENT
  - Account
  - scannable documents = link pdf of scanned
  - acct number
  - acct name
  - handling collector
  - car unit description(motor numbber, chassis number)
  - principal balance (buong utang) and total amount due(past due lang)
  - address and area
  - bucket segment or days past due (gano katagal utang)
  - remarks ng noon (info2)
- ADDED by CONVERGENT (current analytics) blue
  - client status
  - appli id status
  - clateral status
  - socmed status
  - fv status
  - Skiptracestatus
  - daily status \*\*\*\*\*
  - remarks (summary of all above columns as of ...)
  - date resolved
- Search for investigation stat card (search templates)

## List of Tasks to follow

1. 9pm Friday Feb 9, 2018
  - Send document with images of look and feel of the new software based on new flow

## Questions

- Should there be any inputs comments or suggestions please do type below
  - I (jonathan) would read the comments at 9pm Thursday Feb 8, 2018. And would attempt to answer before friday.
- =====  
Place your questions below  
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