**1 Report**

* **Report Name** : Customer and Loan info
* **Group** : Mis
* **ilters** : a. From date and to date depend on disbursement date.
* b. Branch\_id
* **Result set:** First name, Date of birth, gender, branch name, centre name, account number, disbursement amount, no of family member, disbursement date.
* **Tables**: Report\_master, report\_parameter\_mapping

**2. Form**

* **Report Name** : Customer info
* **Record\_id** : loan\_id
* **Table** : form

|  |
| --- |
| CLIENT’S HOUSEHOLD INFORMATION FORM AND BASELINE FORM |

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **A. General Information** | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1. Unit Name | | | | | |  | | | | | | | | | | | | | | | 1. Area | | **01** Rural **02** Urban | | | | | |
| 1. Centre Name | | | | | | |  | | | | | | 1. Group Name | | | | | |  | | | 1. Client’s Loan Cycle : | | | | |  | |
| **B. Client Information** | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1. Client’s name | | | | |  | | | | | | | | | | | | 1. Husband’s name | | | | | | |  | | | | |
| 1. Father’s (unmarried client)/Father in law’s name (widow client) | | | | | | | | | | | | | | | | | |  | | | | | | | | | | |
| 1. Age |  | 1. Gender | | | | | | | **01** Male **02** Female | | | 1. Marital Status | | | | |  | | | | | | | | | | | |
| 1. Religion | | | |  | | | | | | | | | | | | 1. Caste | | | |  | | | | | | | | |
| 1. KYC Doc | | | Type | | | | | Voter ID | | Ration card | Pan Card | | | | Driving license | | | | | | Electricity bill | | | | Bank pass book | | | KYC (if others |
| No. | | | | |  | |  |  | | | |  | | | | | |  | | | |  | | | |
| 1. Address | | | | Present | | | | | | | | | | Permanent | | | | | | | | | | | | 1. Phone number | | |
|  | | | | | | | | | |  | | | | | | | | | | | |  | | |