

**CIMS CLOUD SOURCING –
IDFC**

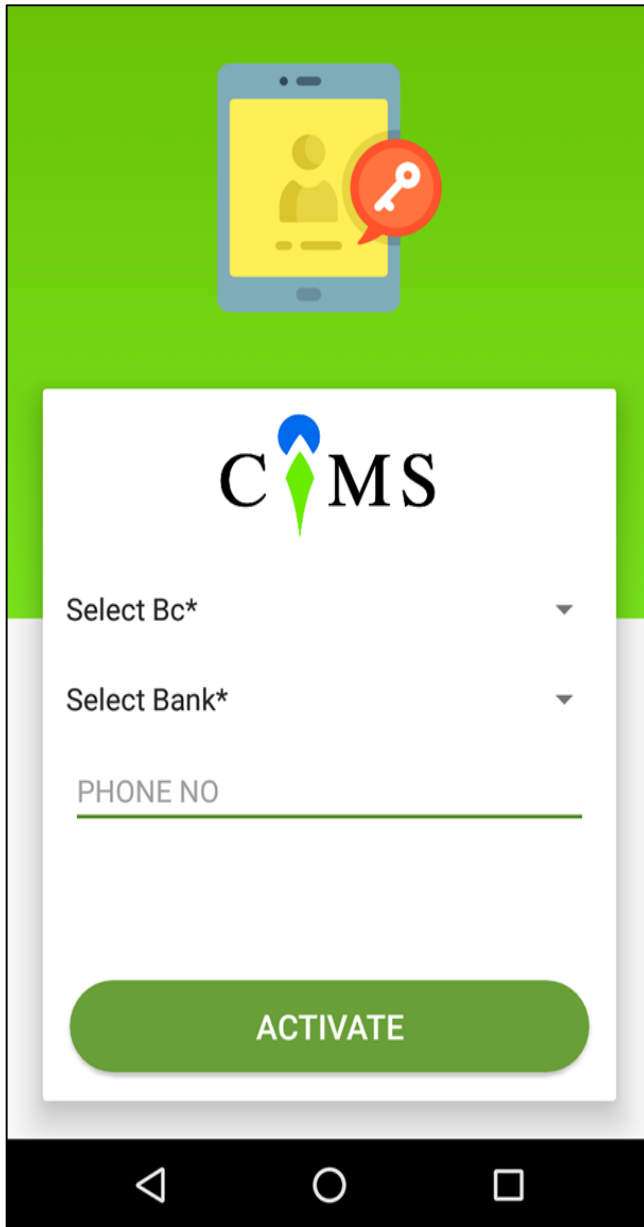
INTRODUCTION

This New version of Mobile App is integrated with Cloud, make users experience easy

Salient Features:

- ✓ Aadhar Card - Manual Entries are Enabled for QR Code Not scanned /Partial details scanned, cases
- ✓ Daughter Groups can be added by using Yes/ No Options
- ✓ Customer Consent & Declaration (CCD) forms are captured ,so as to ensure the compliance

CIMS ACTIVATION PROCESS:



The first screenshot shows the CIMS activation form with the following fields:

- Select Bc***: A dropdown menu.
- Select Bank***: A dropdown menu.
- PHONE NO**: A text input field.
- ACTIVATE**: A green button at the bottom.

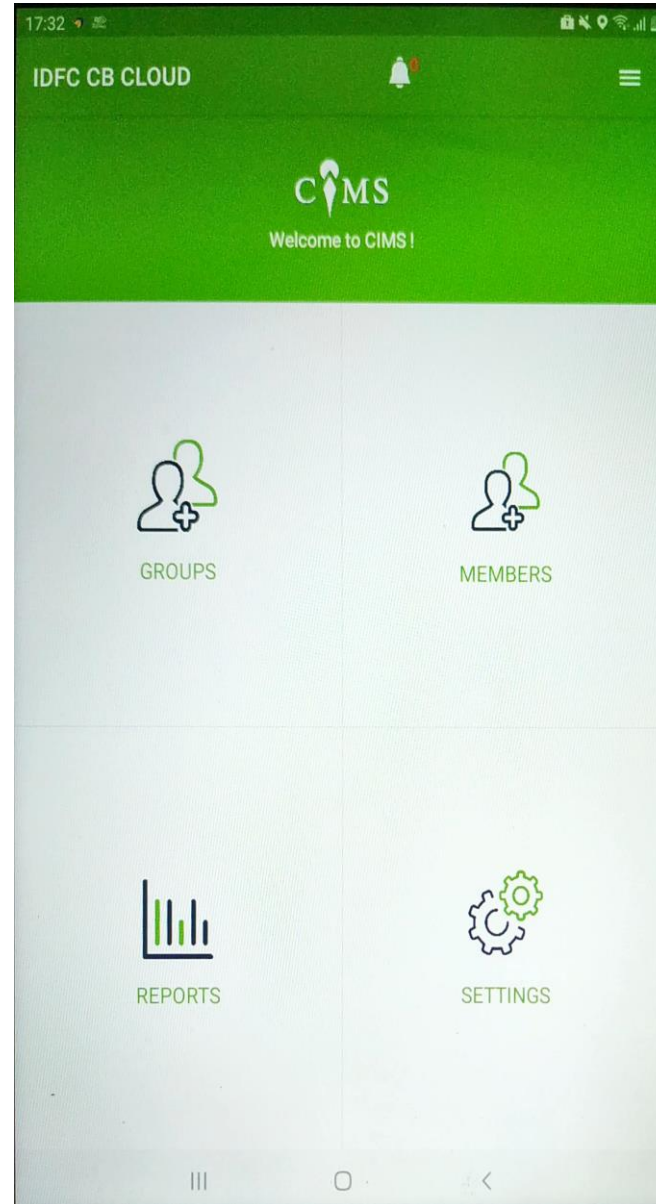
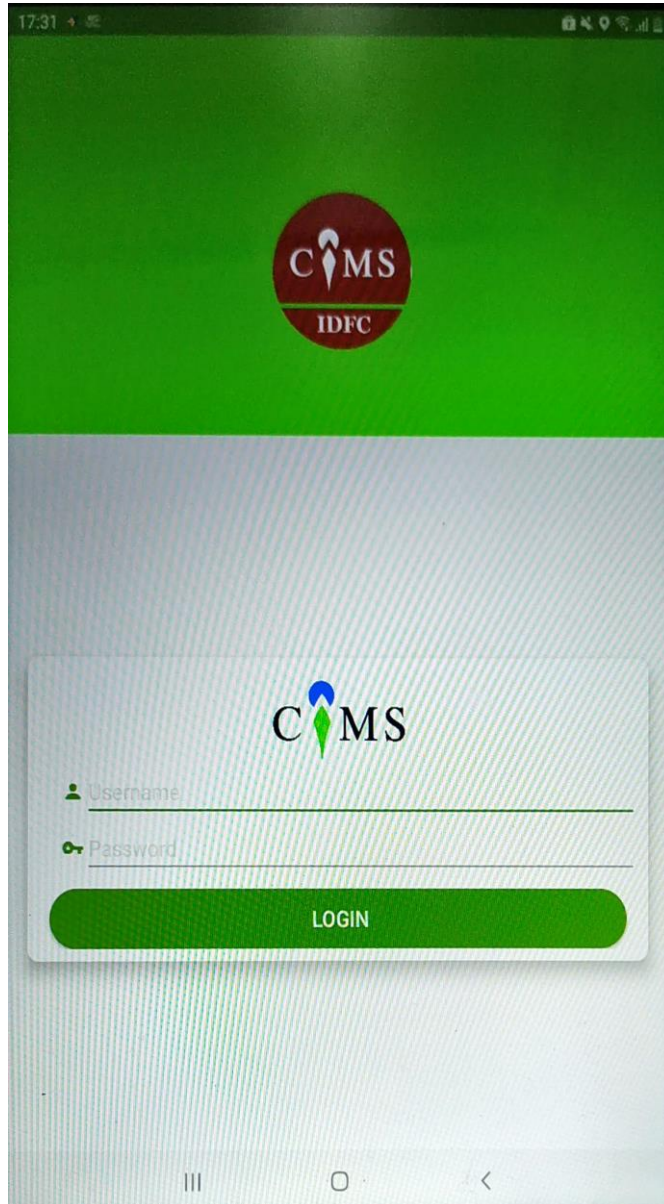


The second screenshot shows the CIMS activation form with the following fields:

- Select Bc***: A dropdown menu with the value **NOCPL** selected.
- Select Bank***: A dropdown menu with the value **IDFC** selected.
- PHONE NO**: A text input field containing the number **9677674799** with the label **(CUG NUMBER ONLY)** in red text.
- ACTIVATE**: A green button at the bottom.

- ▶ Select BC “NOCPL”
- ▶ Select Bank “IDFC”
- ▶ Type CUG number in Phone Number to be Activated

RO LOGIN SCREEN

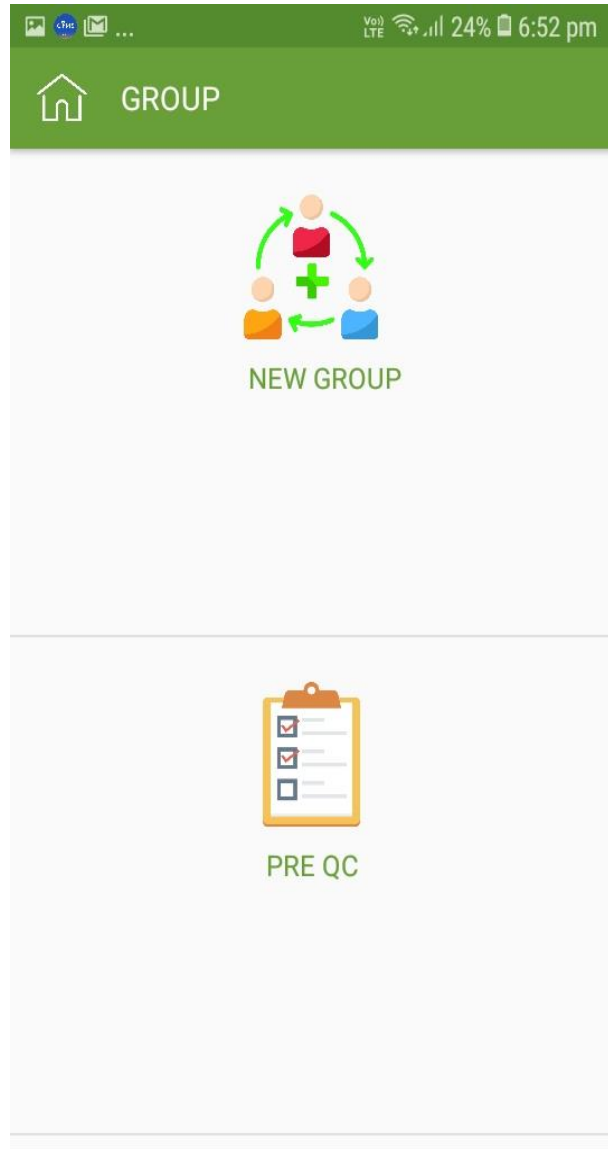


- ▶ RO CIMS –Sourcing Login Screen
- ▶ RO Should login with his User ID and Password

Select “Groups” to find the below 2 Options

1. New Group
2. Pre Qc

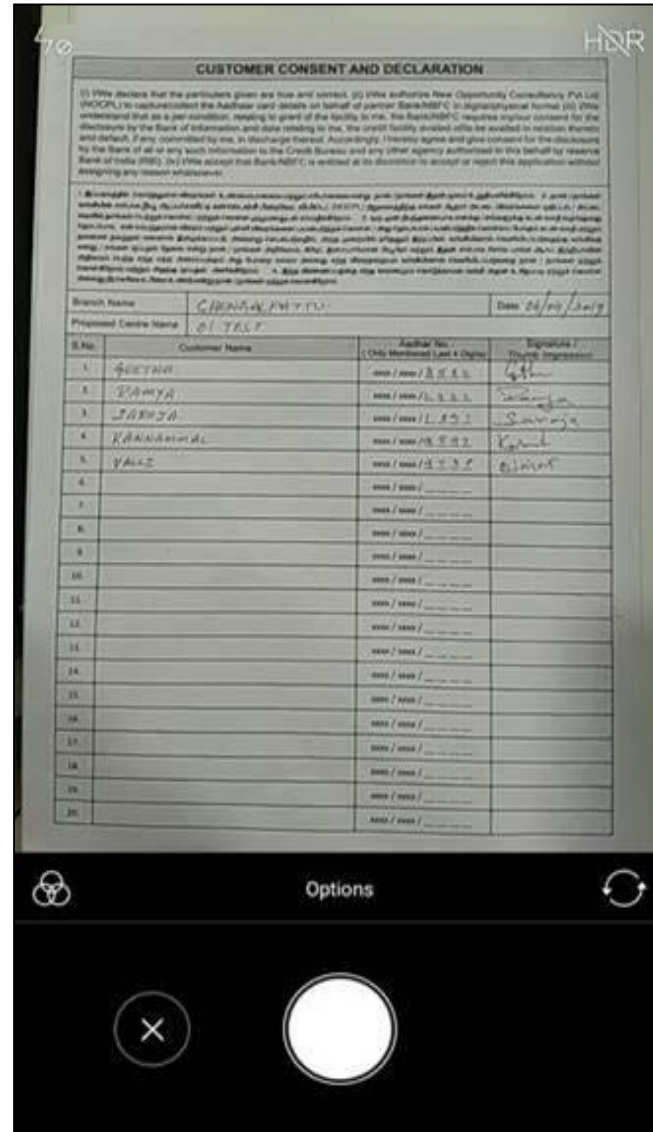
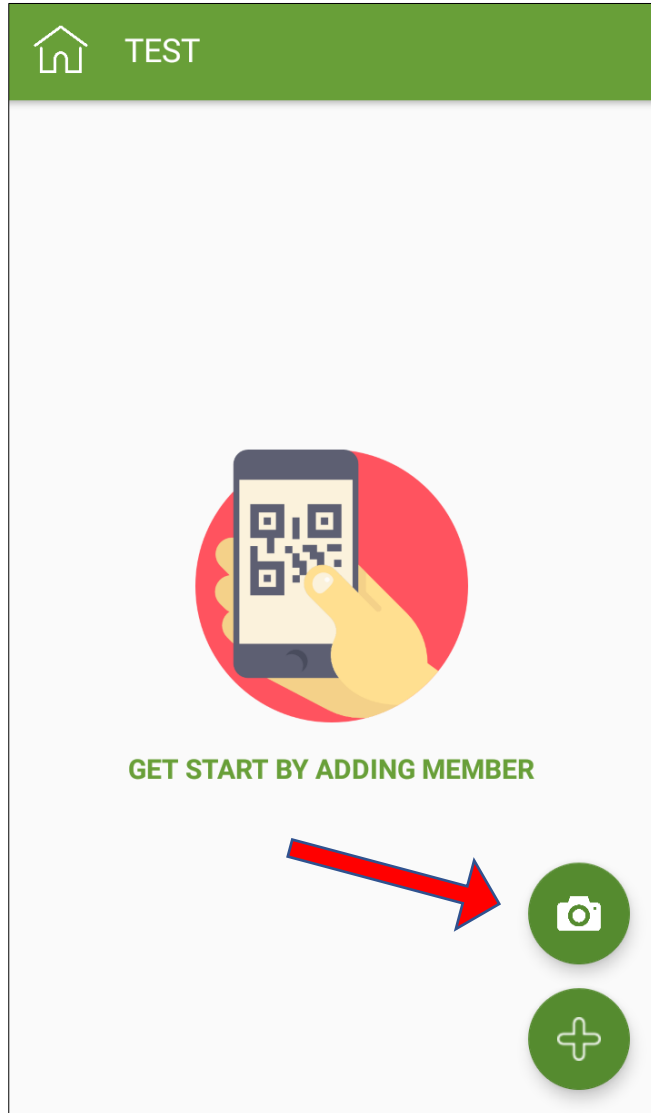
GROUP CREATION



Create a Group

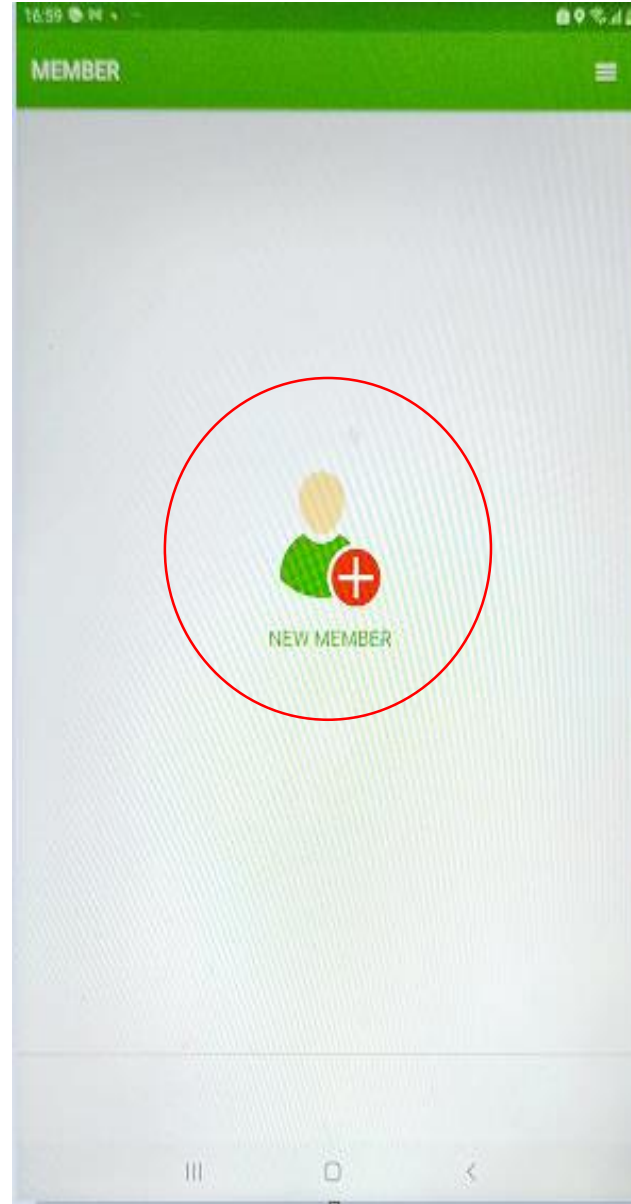
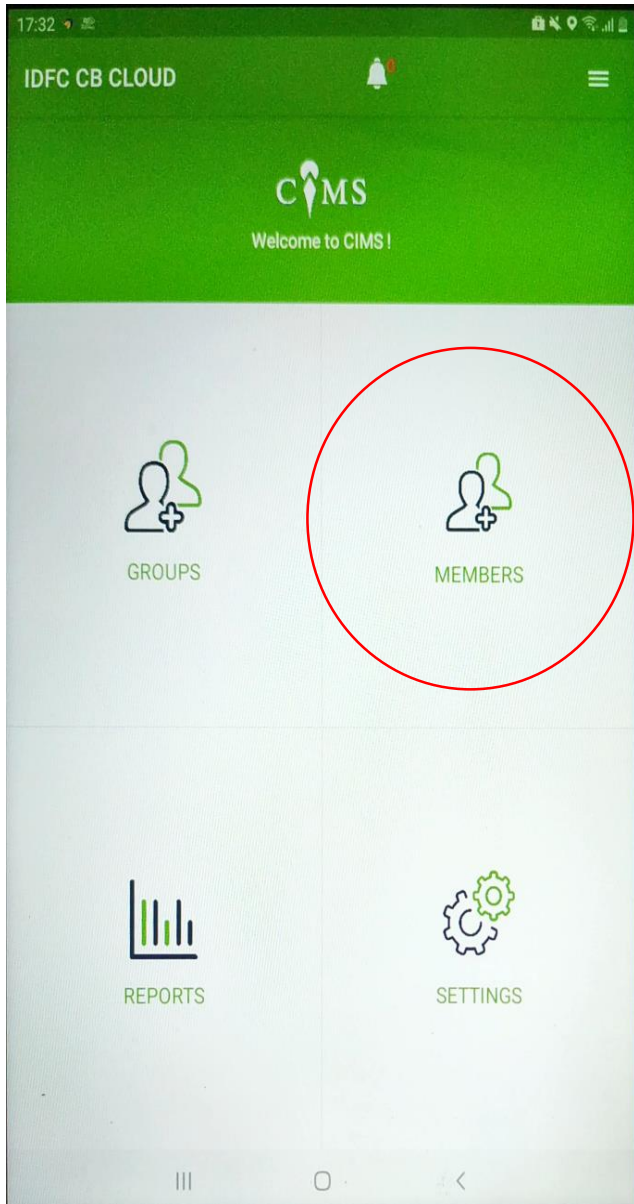
- ▶ Select the Daughter Group – **Yes / No**
- ▶ For the Mother Group / Center, Select only **“NO”**
- ▶ CCD to be captured to Create a Group

CUSTOMER CONSENT & DECLARATION (CCD) FORM



- ▶ All members in the Group have to sign the CCD Form as shown
- ▶ Photo capturing of “CCD Form” is mandatory before “Group Creation”
- ▶ Incase if new members are added to the group “CCD form can be Captured again” (refer pic.1)

ADD NEW MEMBERS



- ▶ Click on members
- ▶ Click on New member

PROCESS FOR INSTANT CB CHECK

17:02

QR (MEMBER) QR (NOMINEE)

SELECT AADHAR

M SCAN TYPE N SCAN TYPE

MEMBER DETAILS

NOMINEE DETAILS

CHECK CREDIT BUREAU

VoLTE 29% 6:30 pm

QR (MEMBER) QR (NOMINEE)

SELECT AADHAR

SCANNED SCANNED

MEMBER DETAILS

MEMBER DETAILS

TITLE Select*
Ulagammal

53 Female

11/09/1966

MEMBER KYC :

MEMBER ID TYPE AADHAAR

*****1097

MEMBER AADHAR ID IS VALID

*****1097

- ▶ Touch “QR Member” / “QR Nominee” to fetch the details from AID using QR
- ▶ If Aadhar card (QR Code) is “Not Scanned” –
 - For Member - Select “M Scan Type”
 - Nominee –Select “N Scan Type”
 - Select “Not Scanned”
 - Manual typing will be enabled
 - Type details as per KYC documents
- ▶ AID will validated During the process and the message will appear as “Member Aadhar ID is Valid”

PROCESS FOR INSTANT CB CHECK

17:08

Modinagar Modinagar

Ghaziabad Modinagar

201204

CURRENT ADDRESS SAME AS ABOVE

DOOR NO

STREET

CITY/TOWN/VILLAGE

DISTRICT PINCODE

MEMBER ADDITIONAL

NOM RELATION Husband

9895655566 UPRADESH

RAJ 01/01/1974

YASAR YASHIN

NOMINEE DETAILS >

CHECK CREDIT BUREAU

17:53

Villavancode Villavancode

Kanniyakumari Villavancode

629178

CURRENT ADDRESS SAME AS ABOVE

DOOR NO

CB RESULT

RESULT: APPROVED

No Of OTHER-MPG	1
No Of Default Accounts	0
Total Outstanding Amount	46611
Max Eligible Loan Amount	30000

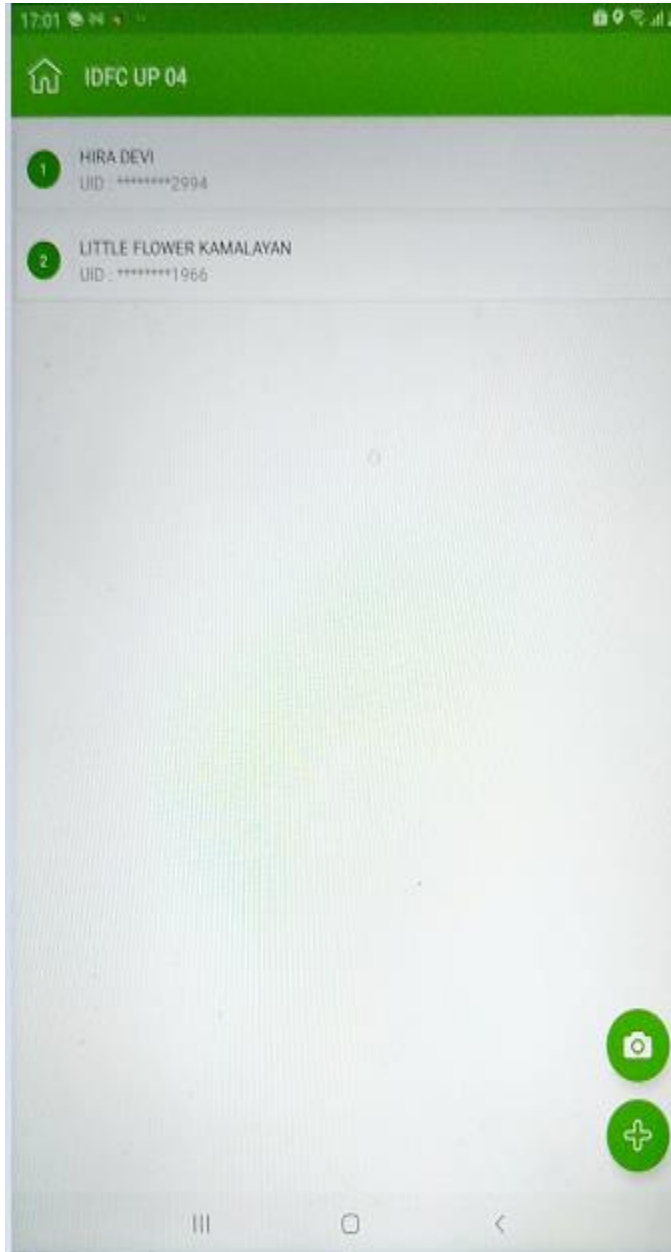
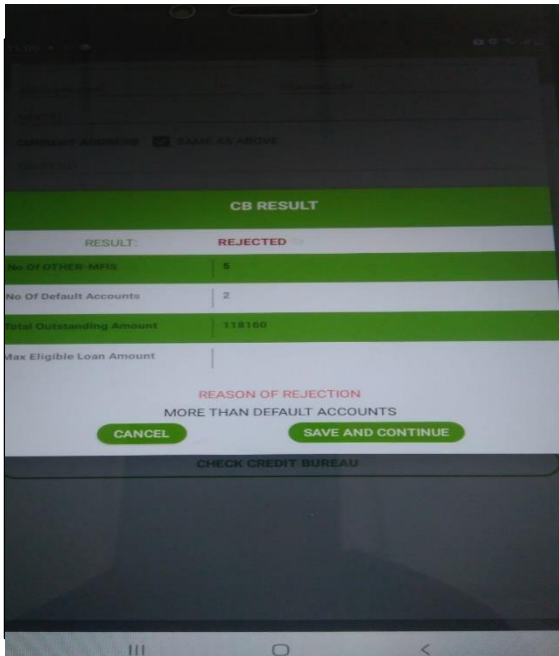
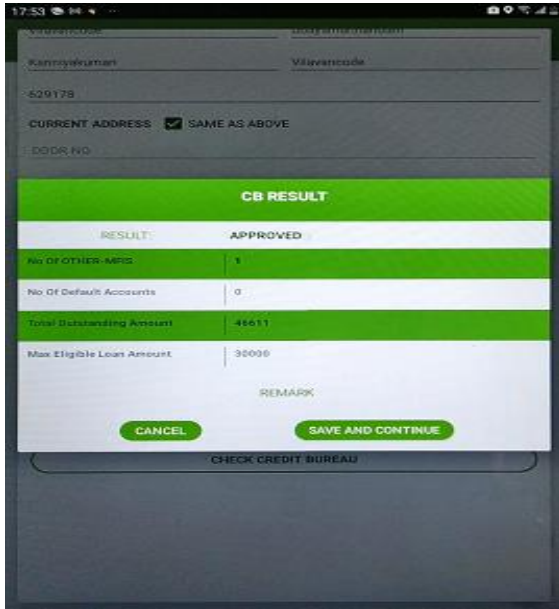
REMARK

CANCEL SAVE AND CONTINUE

CHECK CREDIT BUREAU

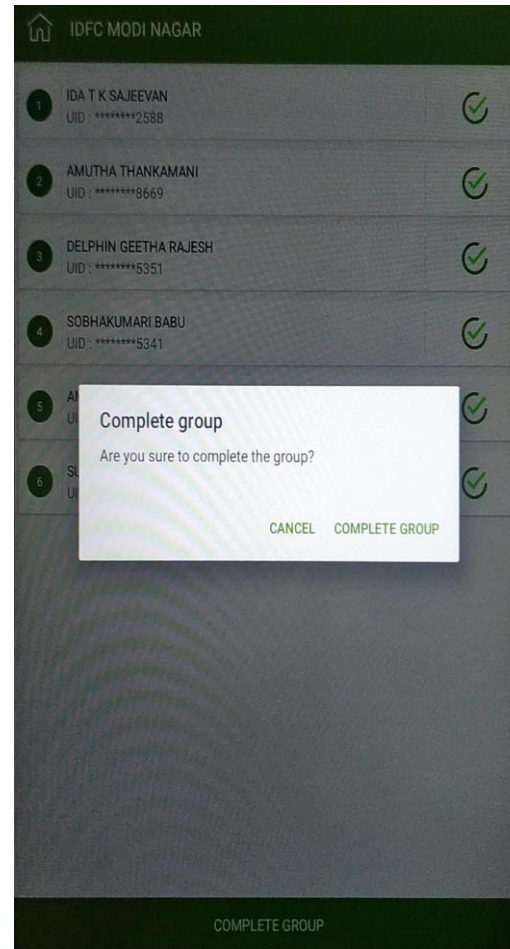
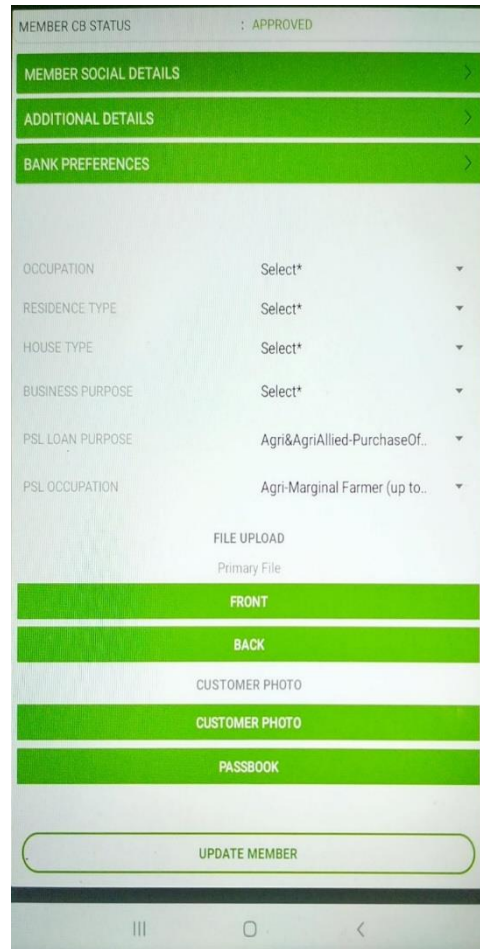
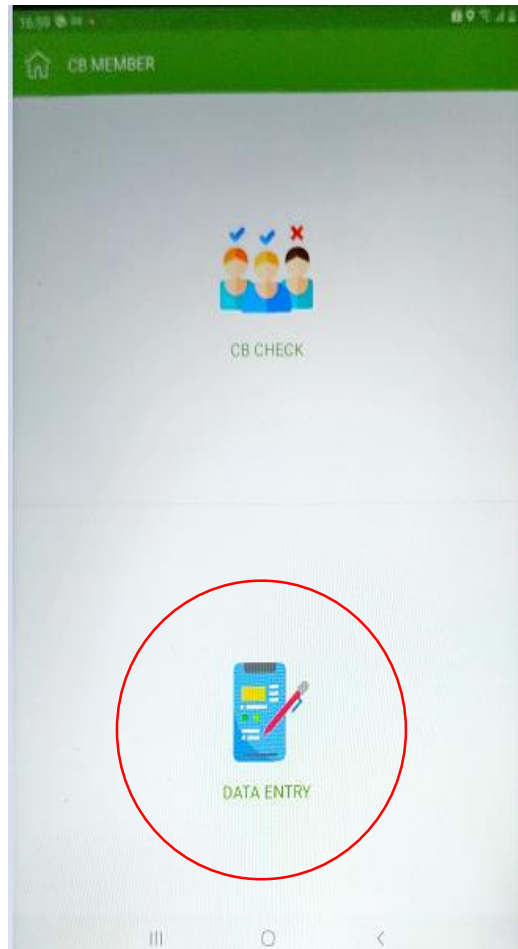
- ▶ Select Correct “Nominee Relation Ship”
- ▶ Fill the relevant details like, Mobile No., Spouse name, DOB, Father name, Mother name
- ▶ Proceed to check credit bureau eligibility Check
- ▶ The validations are confirmed with the message “Approved/Rejected”

ADDING FURTHER MEMBERS



- ▶ Sanctioned members – Click **“Save and Continue”** to add the member
- ▶ Rejected Member –Click Cancel and continue sourcing new members
- ▶ Click on + button to add new members
- ▶ Click on Camera icon to update CCD form for new members.

PROCESS FOR INSTANT CB CHECK



- ▶ Proceed for Customer Data Entry
- ▶ Enter **Bank Preferences**
- ▶ Ensure all details are filled in Bank preference
- ▶ **Capture the Primary KYC Front & Back**
- ▶ **Capture Member live Photo**
- ▶ **Capture Bank Pass book from Original**
- ▶ Finally Click “Update Member” to complete the Member.

Thank You!!!