

# **CIMS CLOUD SOURCING – ESF**

## CIMS ACTIVATION PROCESS:

The image displays two sequential screenshots of a mobile application interface for CIMS activation. Both screens have a green header with a smartphone icon containing a person and a key. The CIMS logo is centered at the top of the white content area.

**Left Screenshot:** Shows the initial form with the following elements:

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

**Right Screenshot:** Shows the form after selection and input:

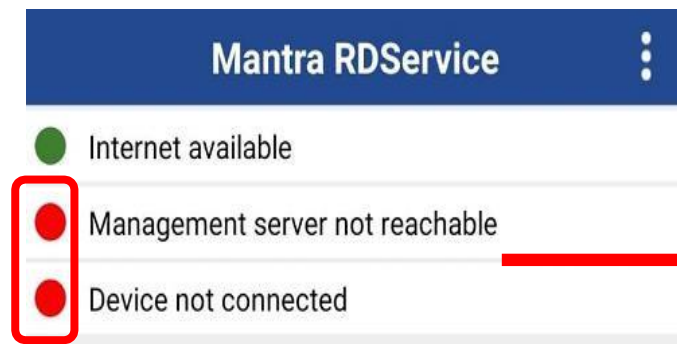
- Select Bc\*:** Displayed as "NOCPL".
- Select Bank\*:** Displayed as "ESF".
- PHONE NO:** Displayed as "9677674799" with "(CUG NUMBER ONLY)" in red text to its right.
- ACTIVATE:** A green button at the bottom.

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

# MANTRA DEVICE ACTIVATION



## Mantra Biometric device



## Mantra device check

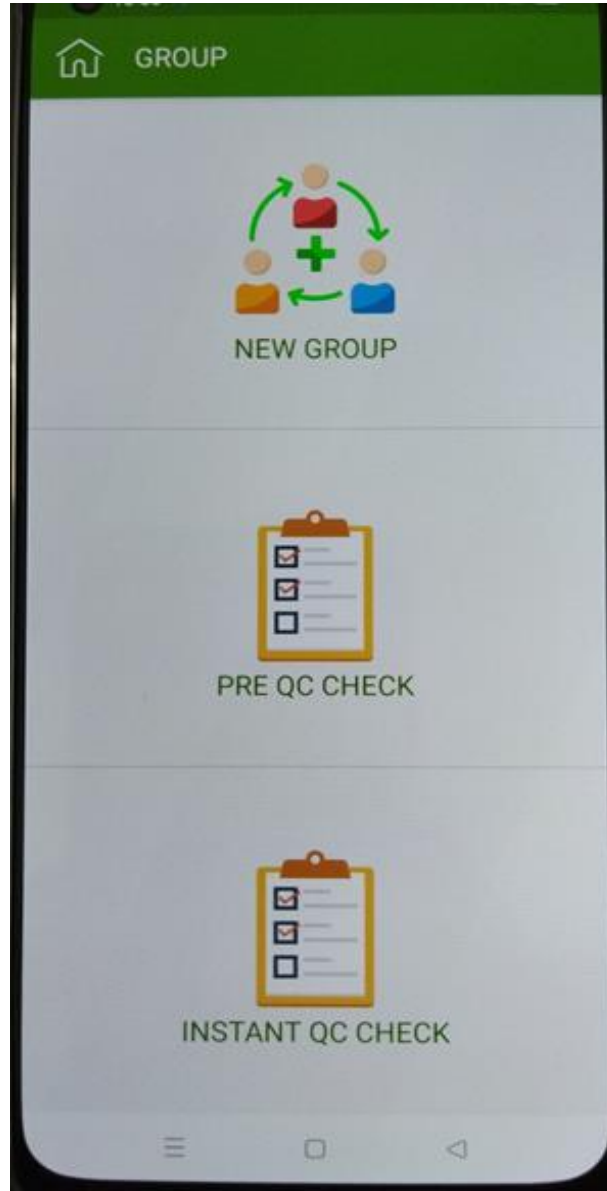
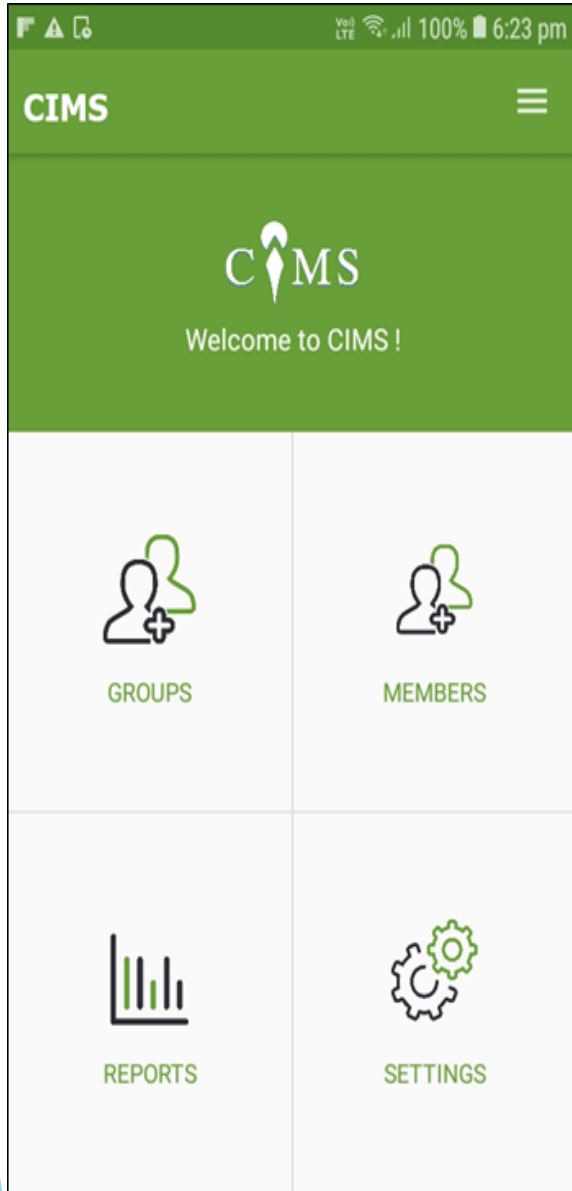
- Ensure biometric device is connected and ready to use.
- Check using Mantra RD service app installed in TAB/Mobile.

Ensure below 3 points should be in (●) **GREEN** indication which is representing the activation of the device to capture customer details

1. Internet available
2. Management server reachable
3. Device connected

If the mentioned 3 points are in (●) **RED** indication, then check Network connection or biometric device connected or contact IT/V1 team for solution.

# RO HOME SCREEN

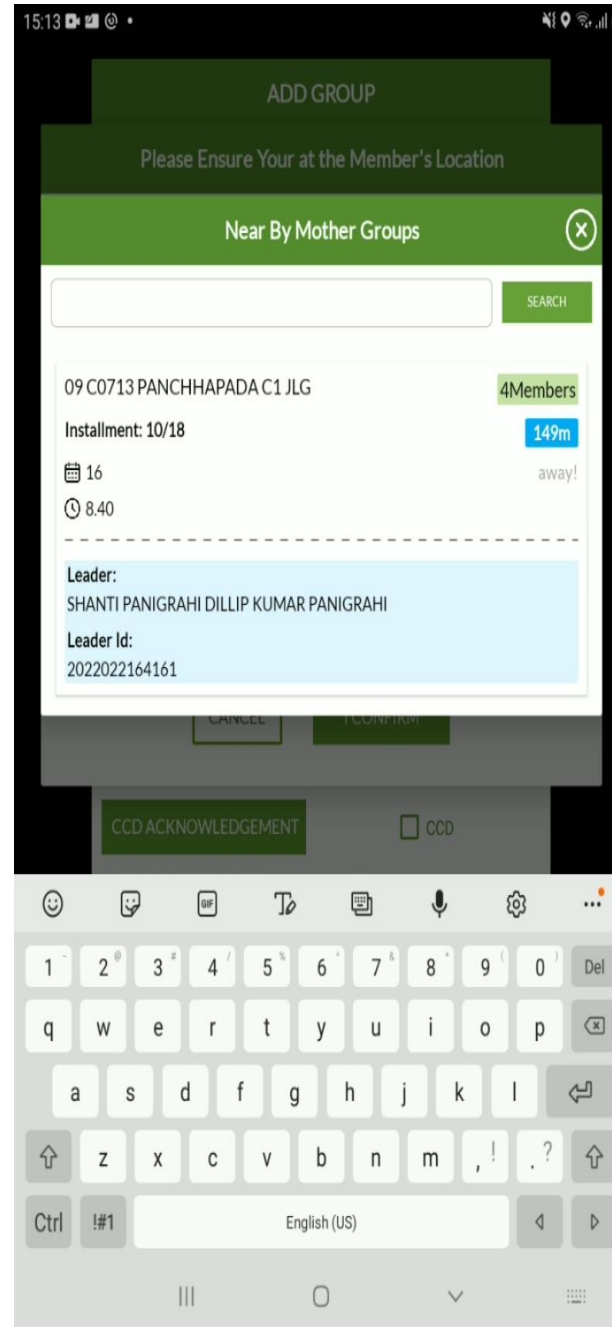
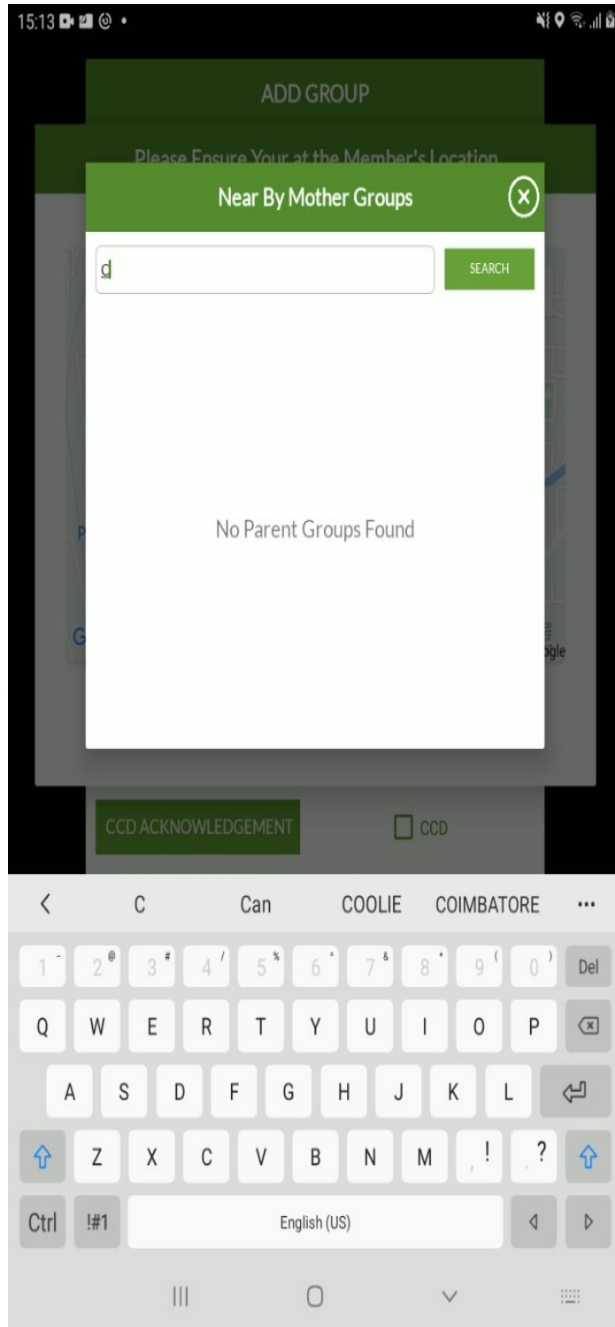
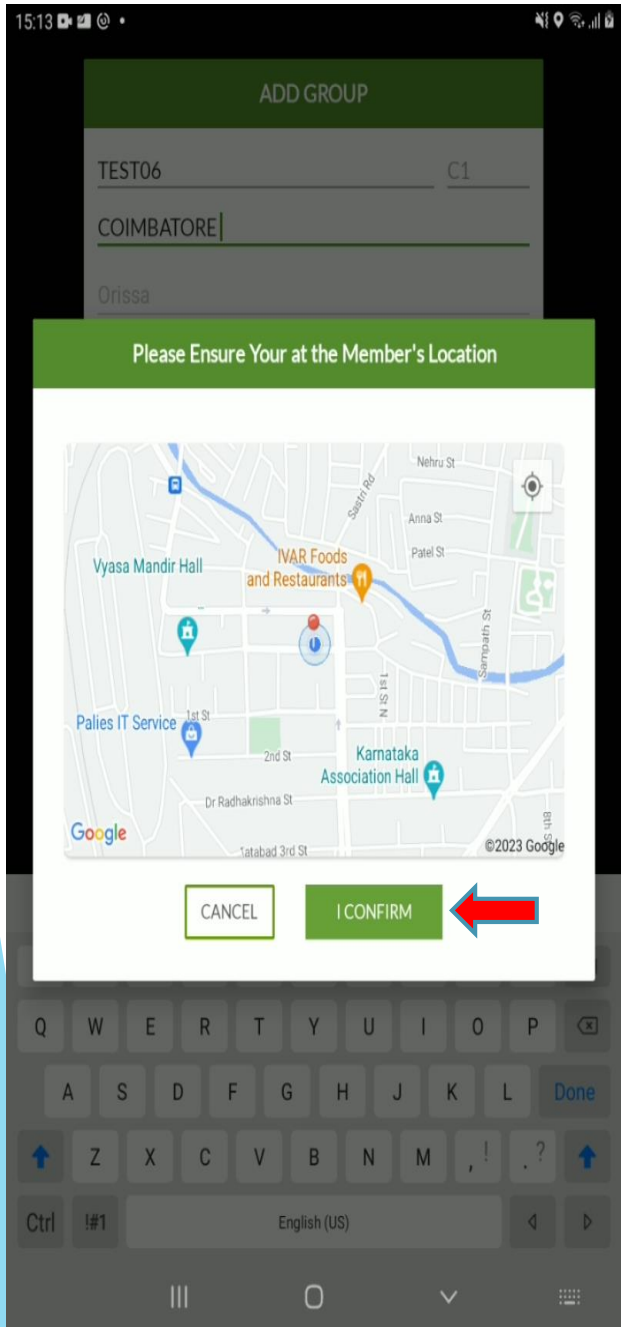


Select "Groups" to find the below 3 Options

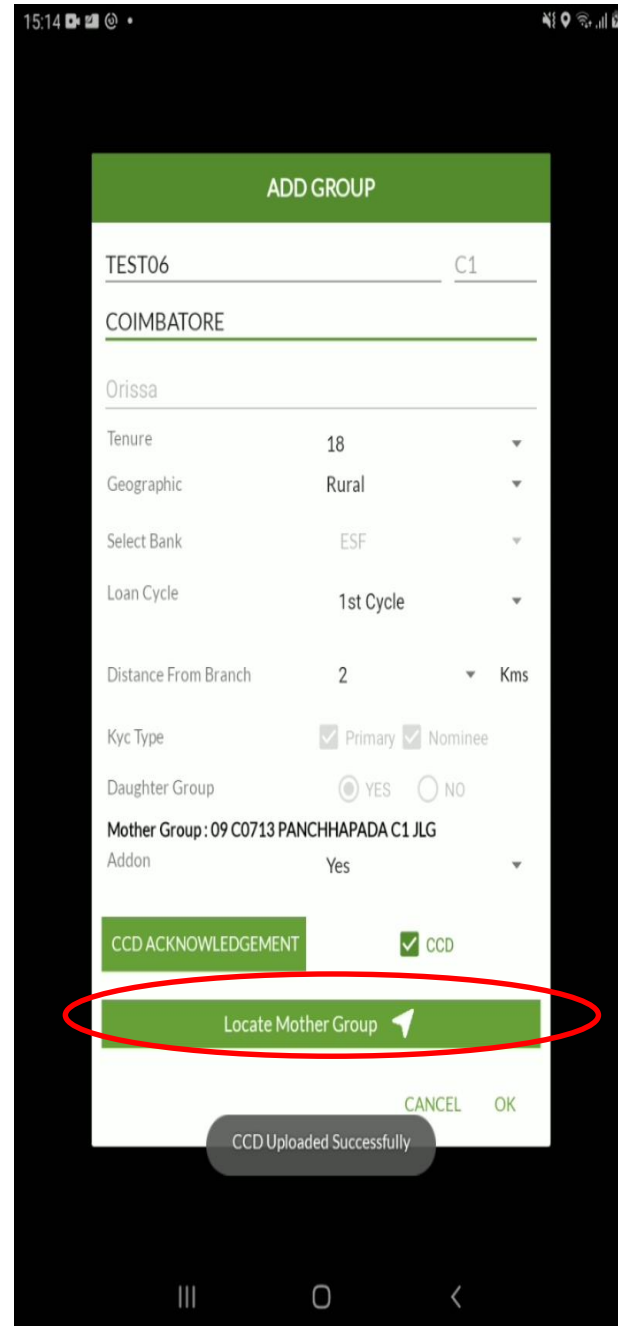
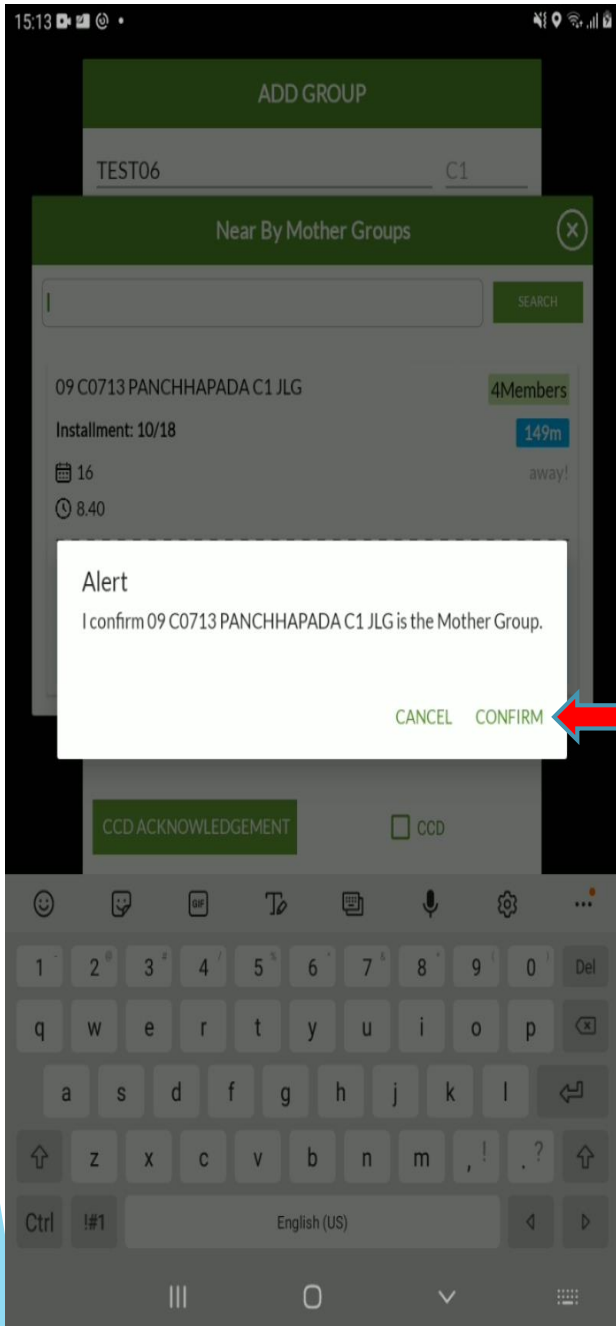
1. New Group
2. Pre-QC Check
3. Instant QC Check

## Mother/ Daughter Group

- Click New Group to create.
- Enter the mandatory fields in Add Group
- Select "No" if Mother Group
- Select "Yes" if Daughter Group

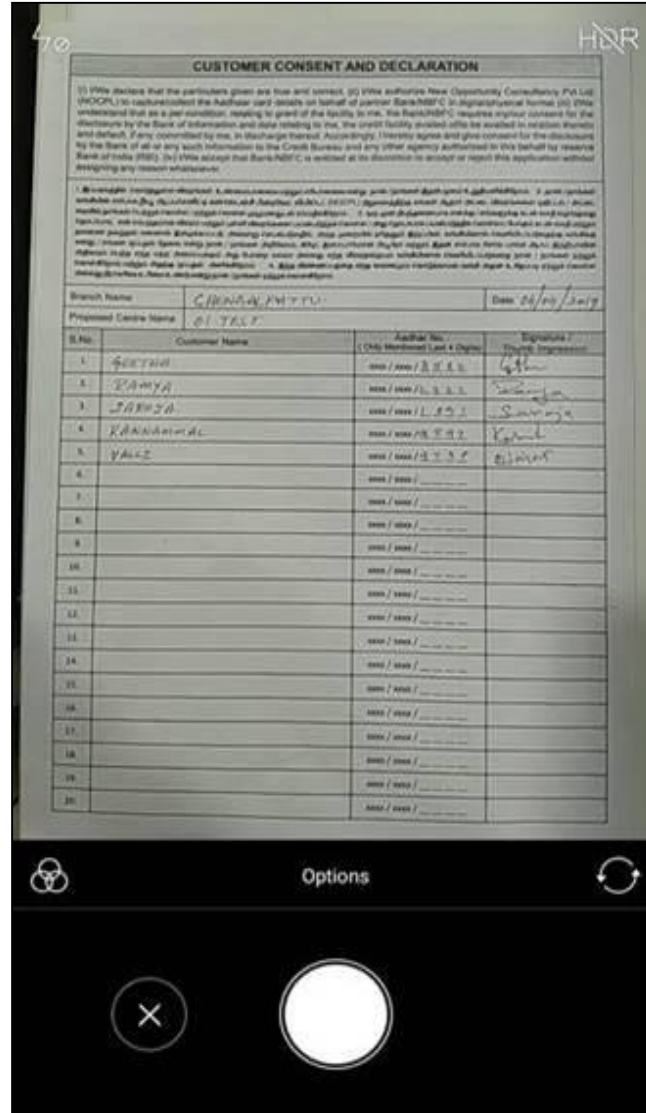
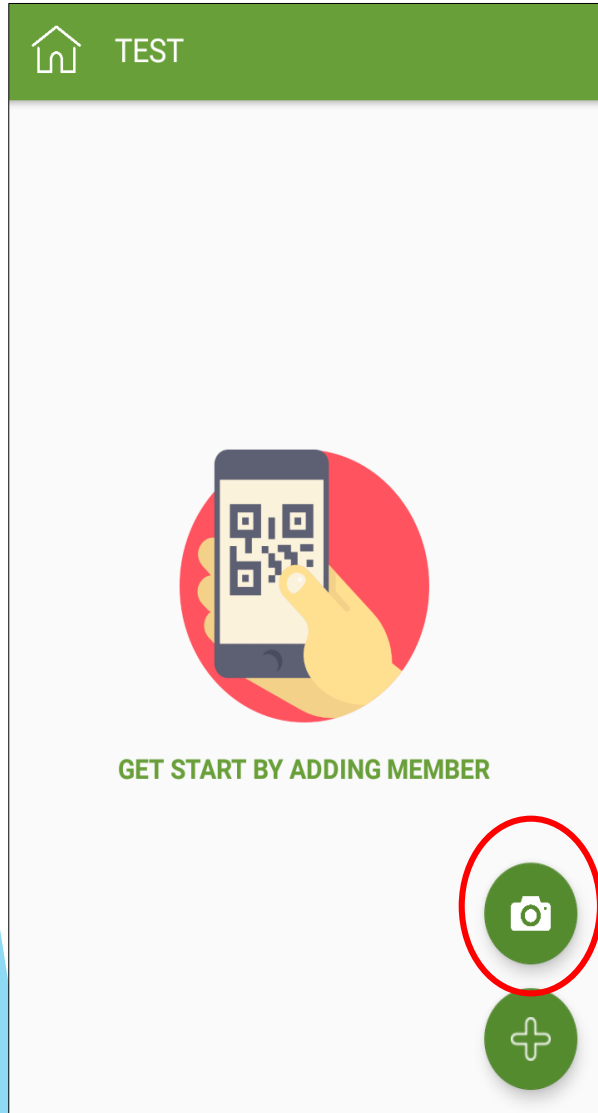


- Select “Yes” if Daughter Group.
- Ensure the current sourcing location of the members and click ‘I Confirm’
- Enter the mother center unique code and click ‘search’.
- If the entered Mother center is of around 1000m from the current sourcing location, it will be shown.



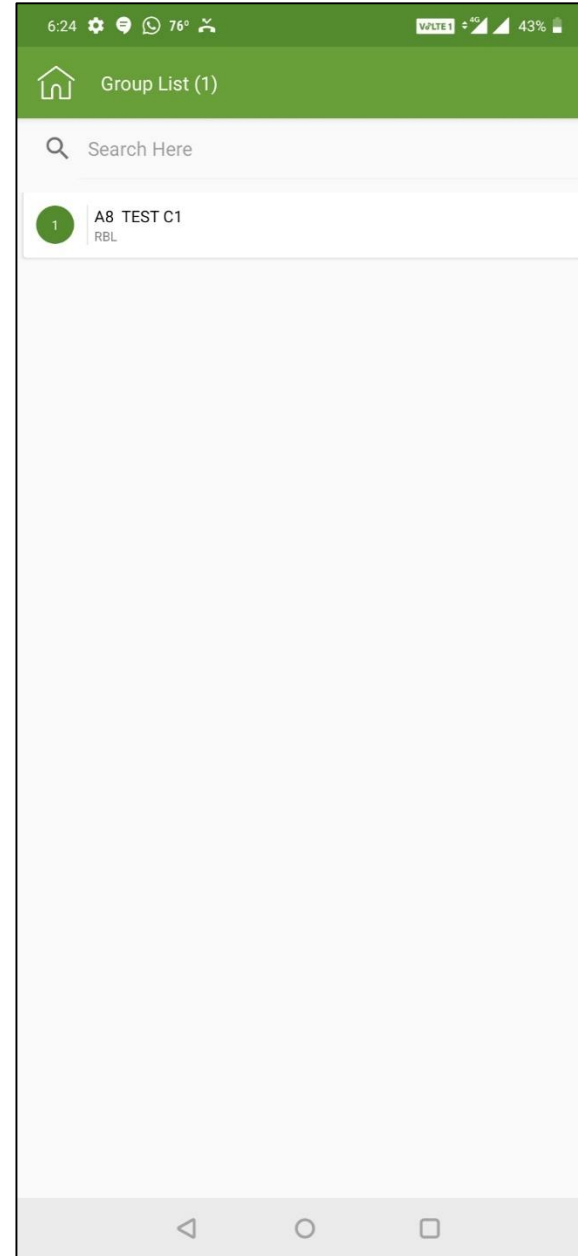
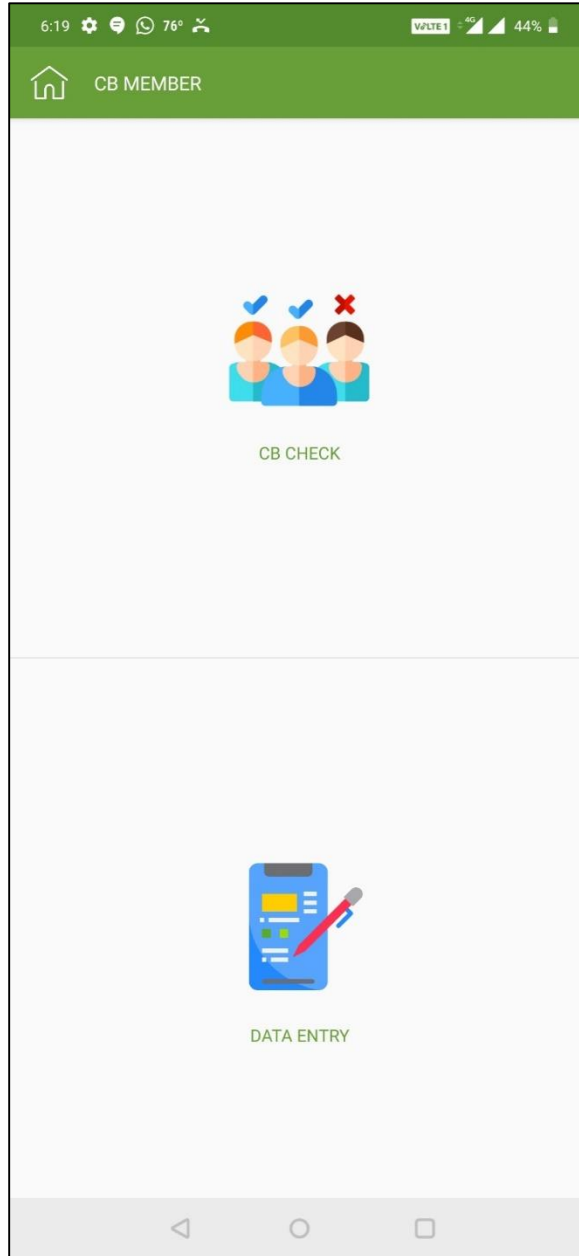
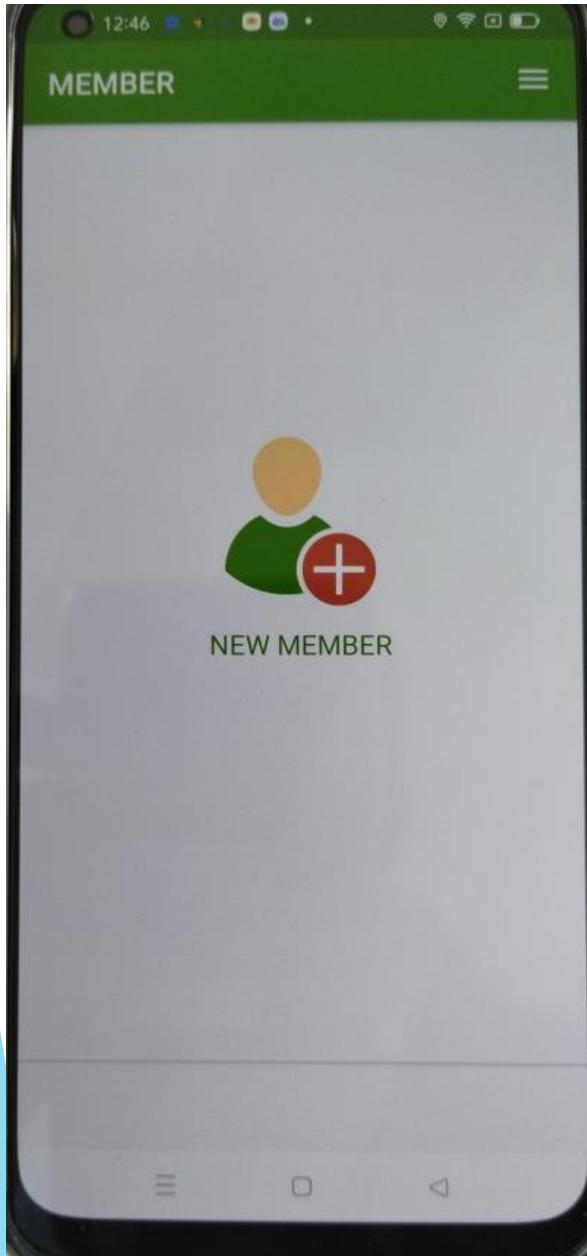
- Select the mother center and click 'Confirm'.
- Click 'Locate Mother Group' option to find the mother group location from the current sourcing location.

# CUSTOMER CONSENT & DECLARATION (CCD) FORM



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

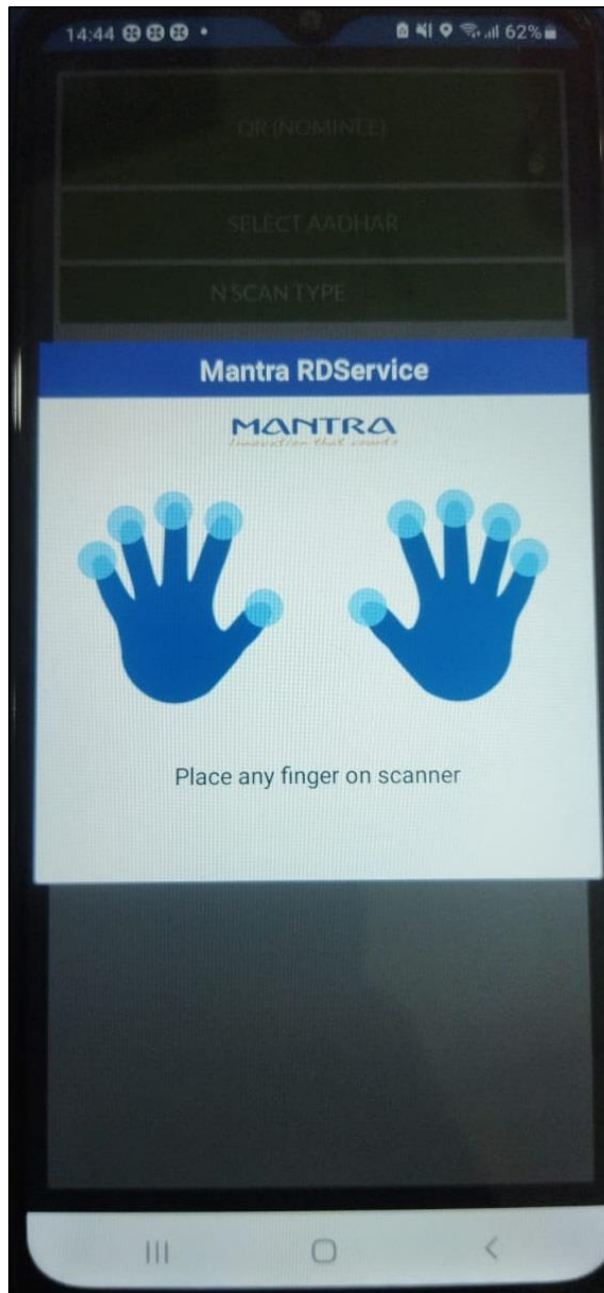
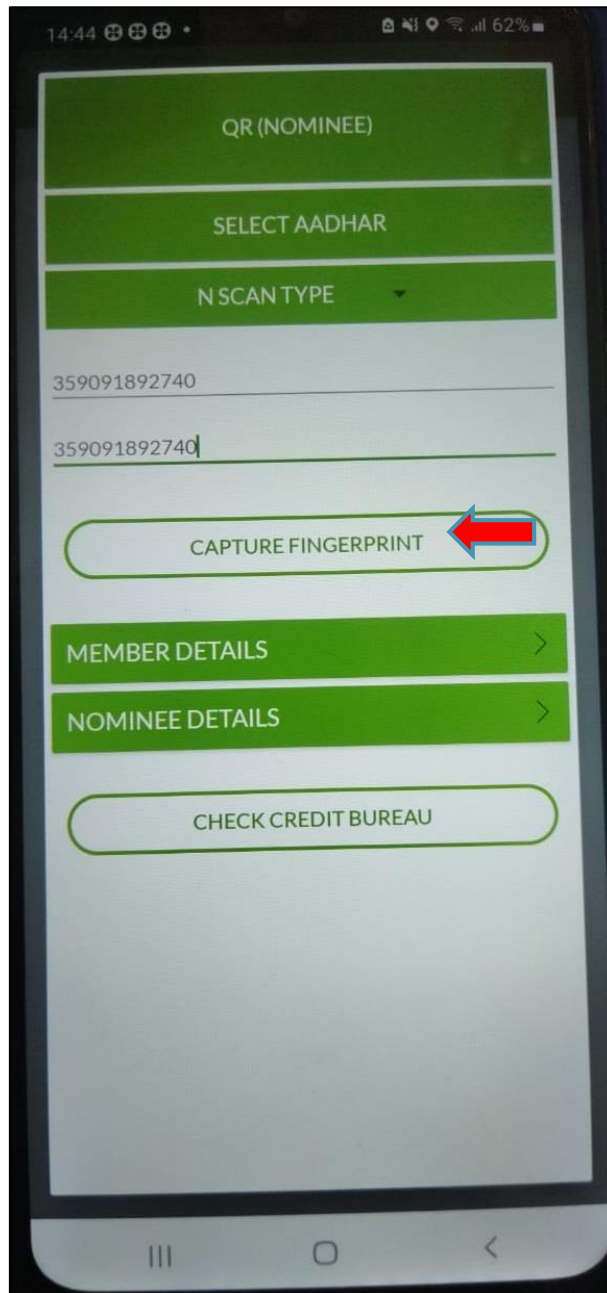
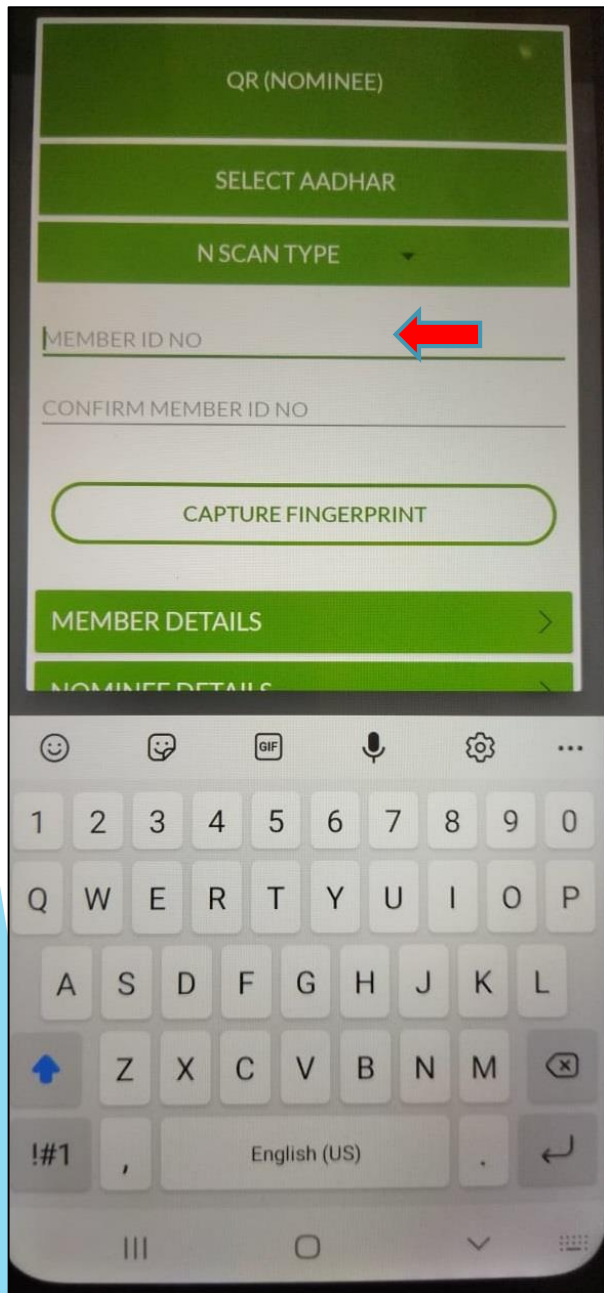
# CB Portal – RO Screen



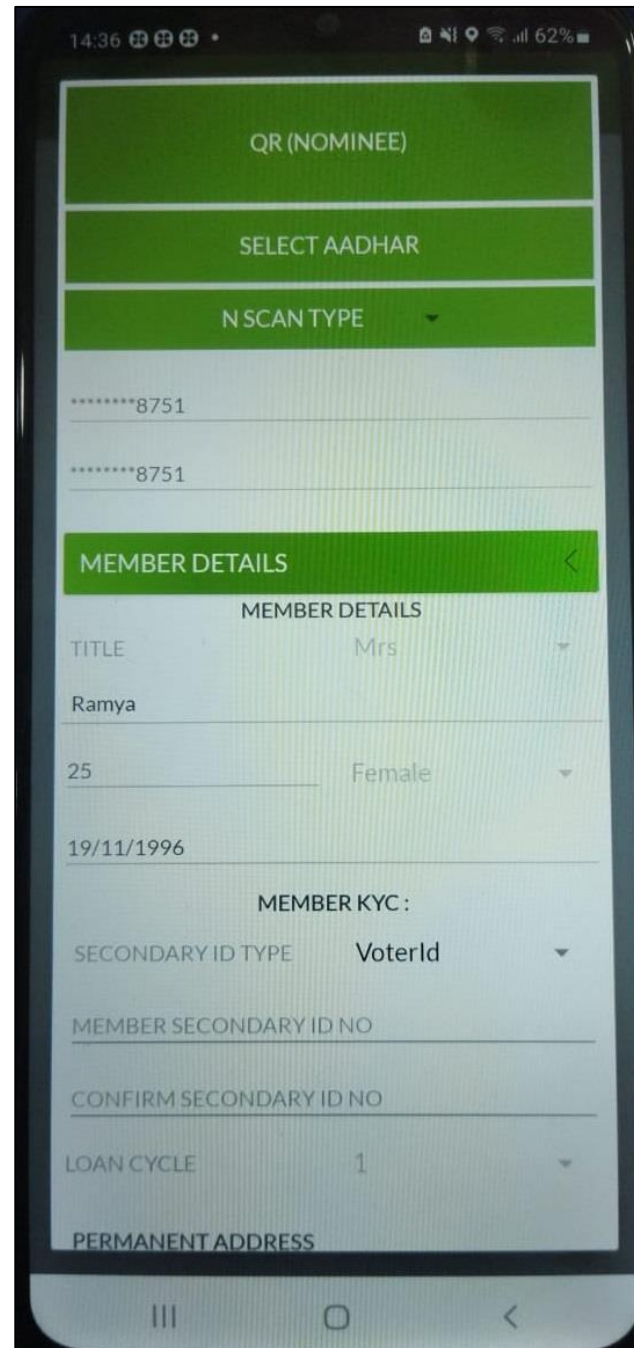
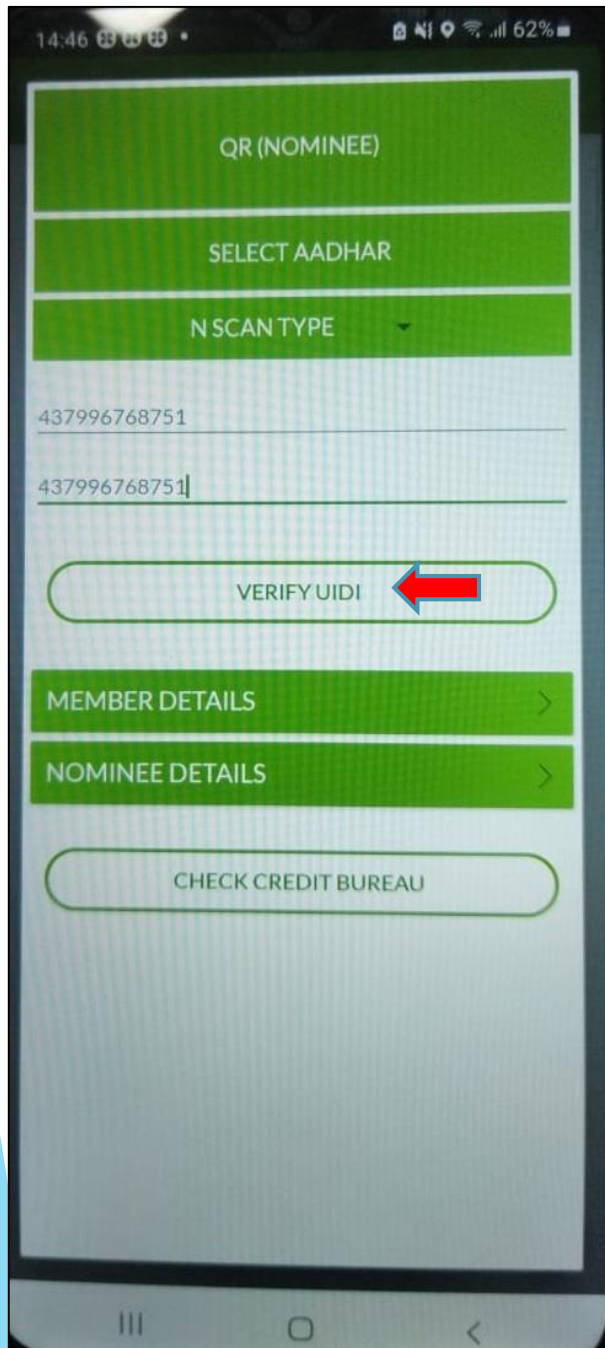
## Customer Onboarding:

1. Select New Member
2. CB Check
3. Select Centre Name

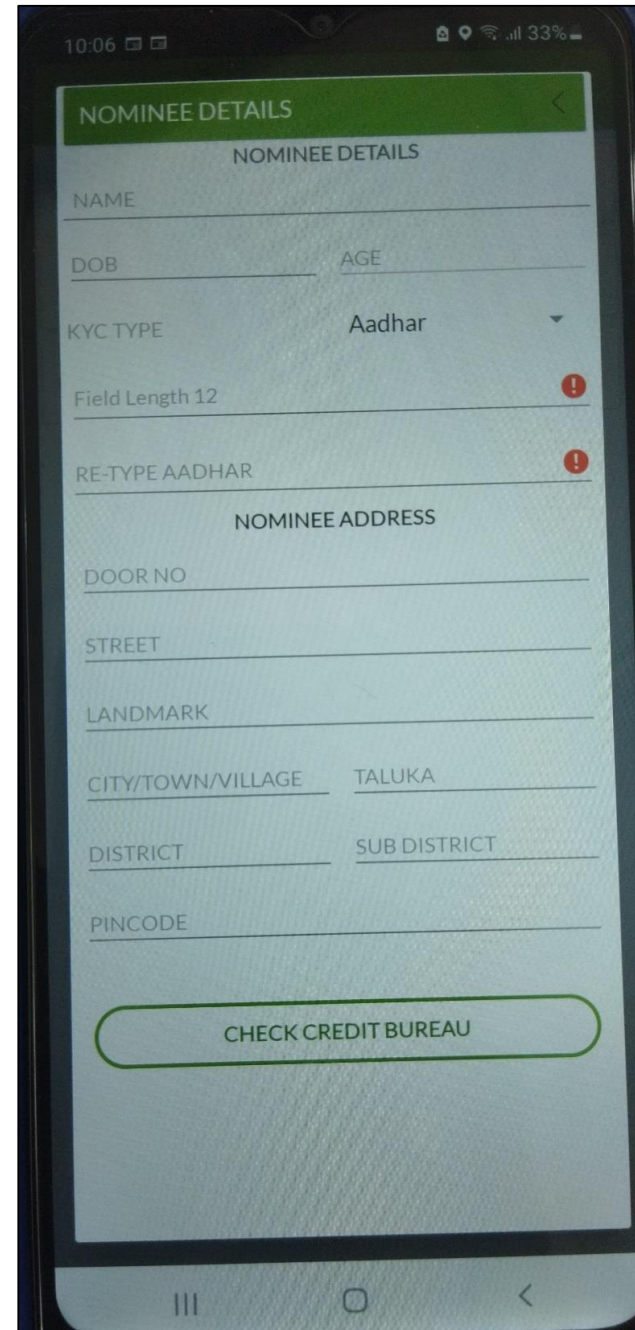
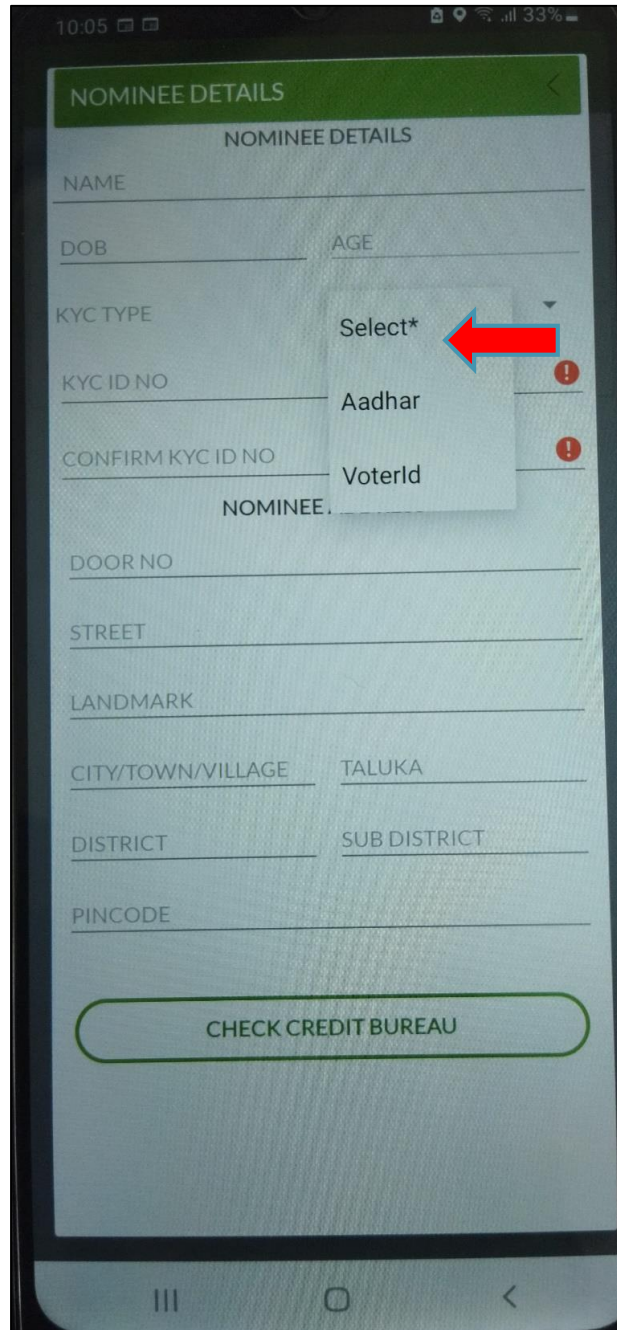
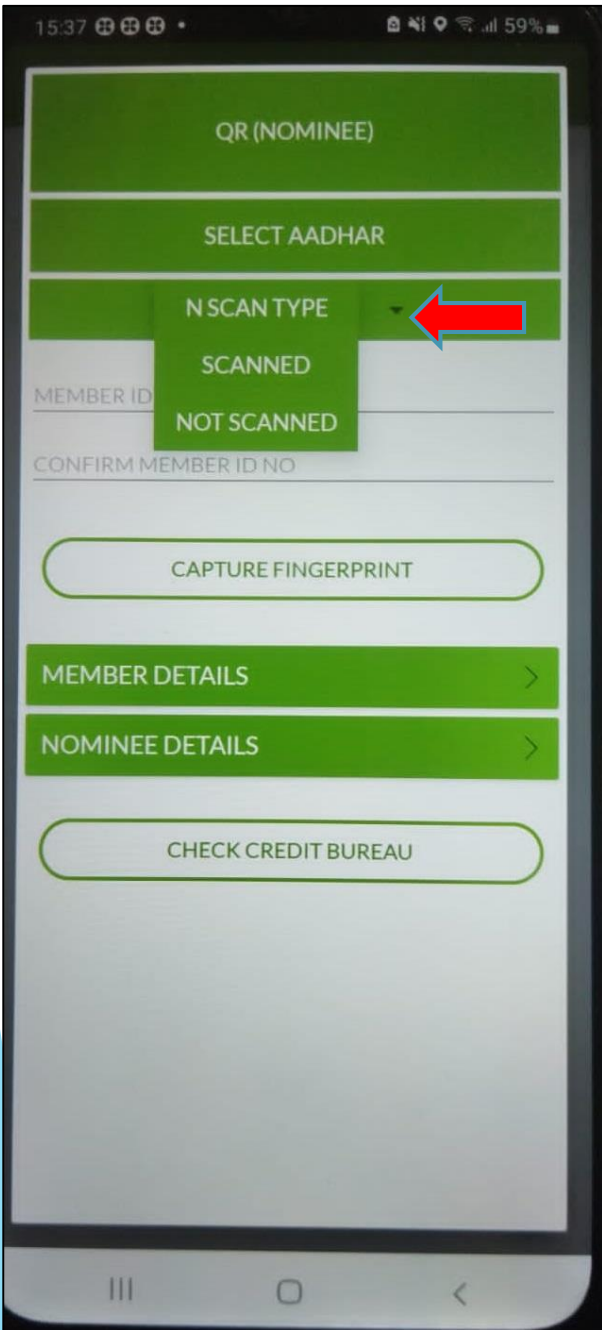
## Ekyc CB Check



- Member Aadhar no. should be entered.
- Click 'Capture Fingerprint'
- Place any finger on Mantra Scanner device



- Once fingerprint captured successfully, click 'Verify UIDI'.
- Then enter Member Secondary ID data
- Fill the other details of the member



- For nominee data, select Aadhar (QR / Manual) or Voter ID.
- Fill the nominee details

## CB Result:

11:02 AM

RAM SITAJ

NOMINEE DETAILS

NOMINEE DETAILS

DILIP KUMAR SAMAL

12/05/1966 56

KYC TYPE Aadhar

\*\*\*\*\*0396

**CB RESULT**

RESULT: **APPROVED**

REMARK

CANCEL SAVE AND CONTINUE

Mahakal Pada Mahakalpada

Jajapur SUB DISTRICT

754214

CHECK CREDIT BUREAU

Approved Member

10/03/1985 37

KYC TYPE VoterId

\*\*\*\*\*40

\*\*\*\*\*40

NOMINEE ADDRESS

DOOR NO

**CB RESULT**

RESULT: **REJECTED**

REASON OF REJECTION

DEFAULT WITH OTHER INSTITUTION

CANCEL SAVE AND CONTINUE

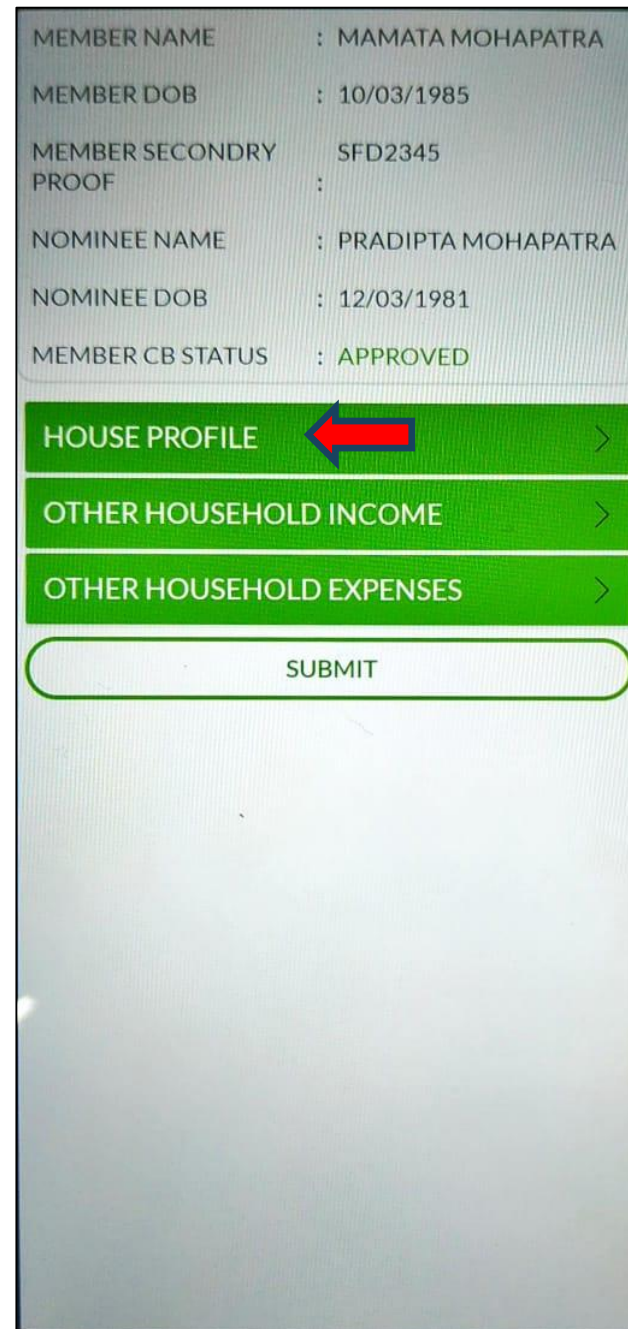
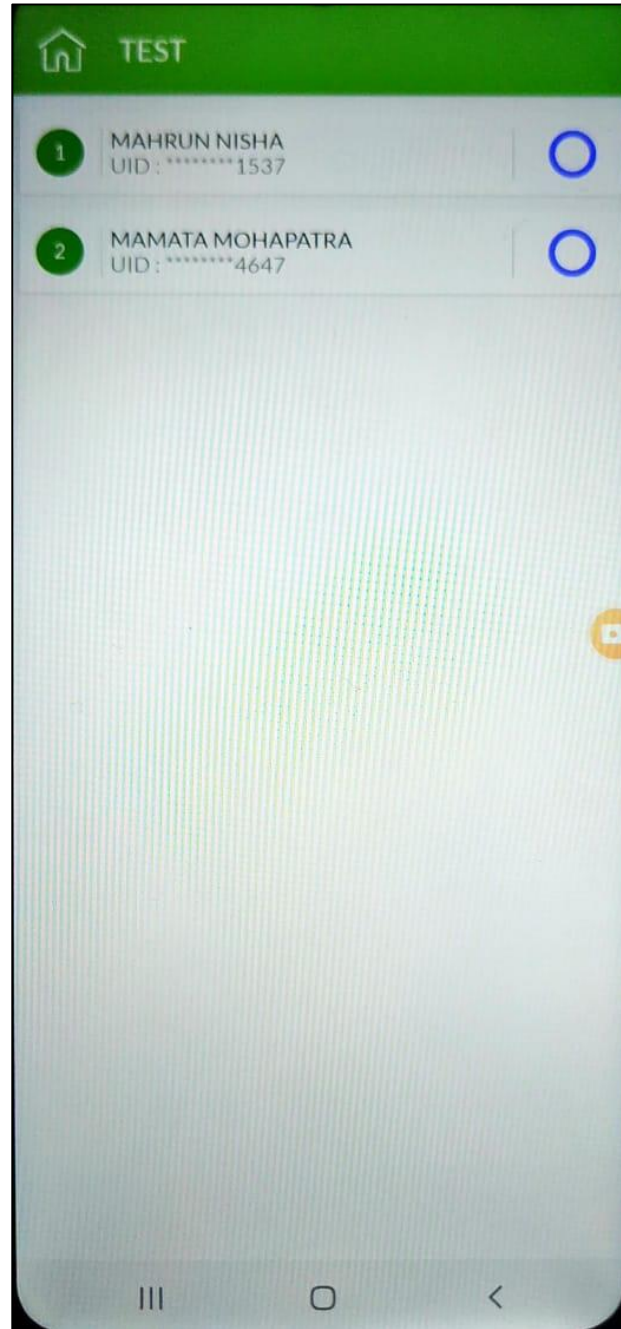
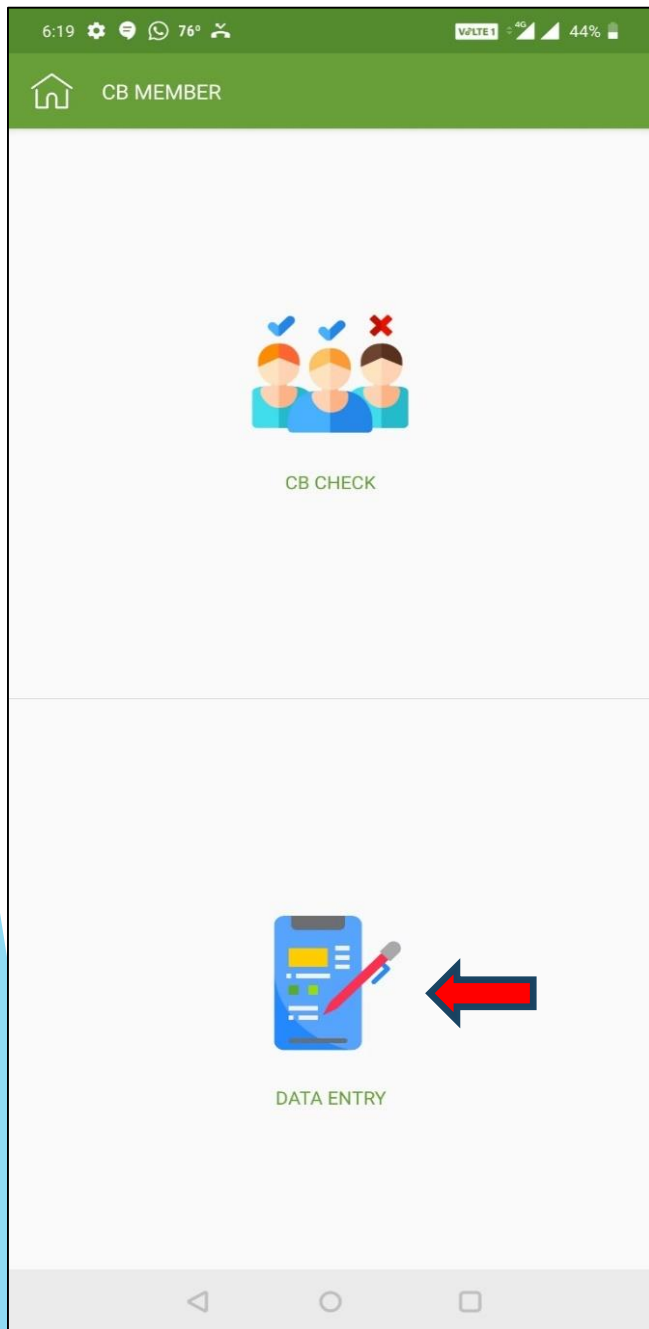
CHECK CREDIT BUREAU

Rejected Member

## Credit Bureau Results

1. Approved
2. Rejected

# Detailed Data Entry



➤ Select Data Entry

➤ Select Member

➤ Click on House Profile

MEMBER NAME : MAMATA MOHAPATRA  
MEMBER DOB : 10/03/1985  
MEMBER SECONDRY PROOF : SFD2345  
NOMINEE NAME : PRADIPTA MOHAPATRA  
NOMINEE DOB : 12/03/1981  
MEMBER CB STATUS : APPROVED

### HOUSE PROFILE

#### House Profile

Total Family Members 7  
Earning Members in the Family(excluding Member) 3  
Member is also Earning in the Family Yes  
Total Earning Members 4  
Type of Accommodation Rent  
House Type Pucca  
Basic Amenities:  
Electricity Yes  
Toilet Yes

#### Basic Amenities:

Electricity Yes  
Toilet Yes  
Water Supply Yes  
Sewage Yes  
Cooking Gas Yes  
Other HouseHold Assets:  
Land No  
Shop Yes  
Television Yes  
Livestock No  
Fridge Yes  
Smartphone Yes  
Two-wheeler Yes  
Others

Smartphone No  
Two-wheeler Yes  
Others

### MEMBER INCOME DETAILS

#### Member Income

Sector of Work SALARIED  
Nature of Work SALARIED  
Income Fequency Monthly  
Months of employment in last 1 year 12  
Monthly Income 10000  
Other Monthly loan obligations 1420

### INCOME GENERATOR 1

#### Income Generator 1

Name  
Relationship Select\*

- In House Profile, fill the appropriate details.
- Then fill the Member Income & Income Generator Details.
- Other Monthly Loan Obligations will be automatically filled via CB.

**INCOME GENERATOR 1**

**Income Generator 1**

Name PRADIPTA MOHAPATR

Relationship Husband

DOB 12/03/1981

Gender Male

Marital Status Married

KYC Type VoterId

KYC ID sfd345678

Same as Member Mobile Number

Mobile 9897646464

DOOR NO \_\_\_\_\_

STREET \_\_\_\_\_

DANPUR \_\_\_\_\_

Danpur Danpur

Kendrapara Mahakalapada

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Nilapada Chhoti

Jajapur Binjharpur

754214

Sector of Work SALARIED

Nature of Work SALARIED

Income Fequency Monthly

Months of employment in last 1 year 12

Monthly Income Select\*

Other Monthly loan obligations 0

**OTHER HOUSEHOLD INCOME** >

**OTHER HOUSEHOLD EXPENSES** >

**SUBMIT**

➤ Fill the Income Generator Details as given including the other monthly loan obligations if available.

Income Frequency Monthly

Months of employment in last 1 year 12

Monthly Income 3000

### OTHER HOUSEHOLD INCOME

Other Household Income

Rent/Lease	101
Government-transfer	500
Pension	650
Remittances	209
Scholarship	1200
Others	660
<b>Total Household Income</b>	<b>17320</b>

### OTHER HOUSEHOLD EXPENSES

HouseHold Expenses

Regular Expenses

Rent/Lease	0
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### OTHER HOUSEHOLD EXPENSES

HouseHold Expenses

Regular Expenses

Rent/Lease	2500
Food+Cooking fuel	1000
Clothes	250
Education expenses	800
Electricity/phone/data/cable	50
Transport	750
Entertainment/social obligations	0
Other	550
<b>Total Regular Expense</b>	<b>5900</b>


Annual Irregular Expenses

Medical/Health	0
House Renovation	0

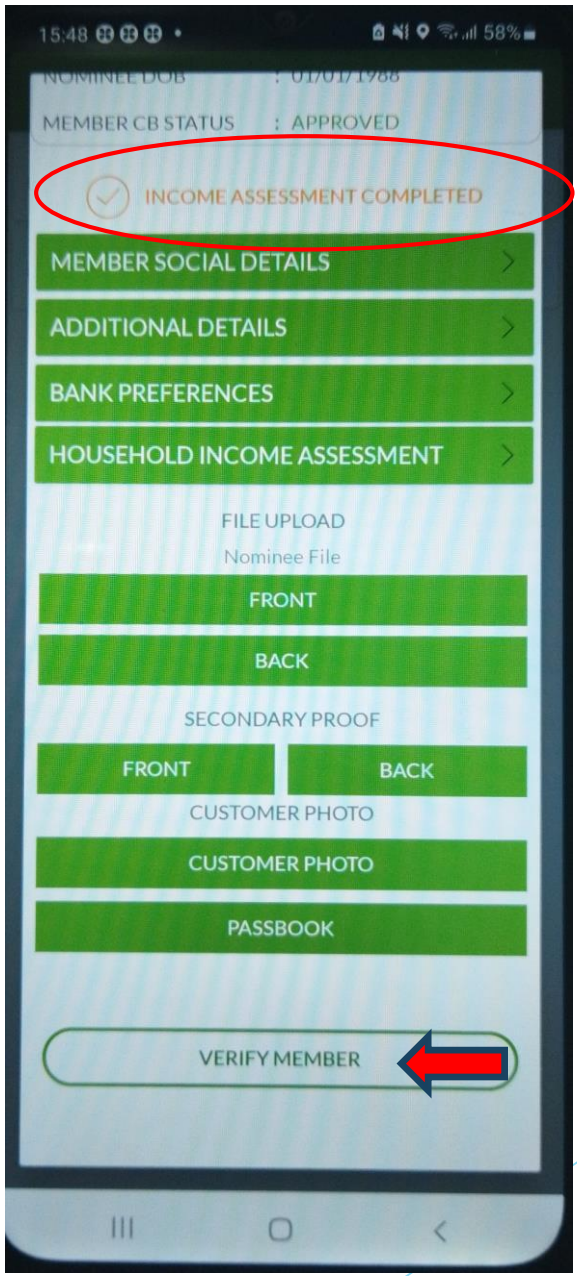
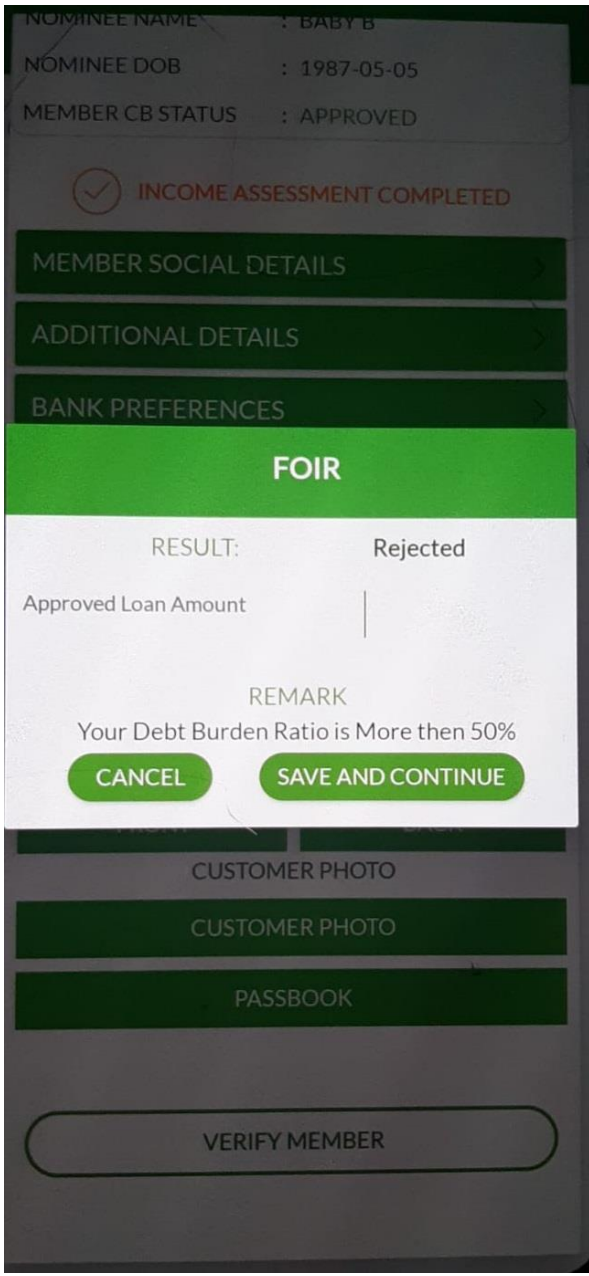
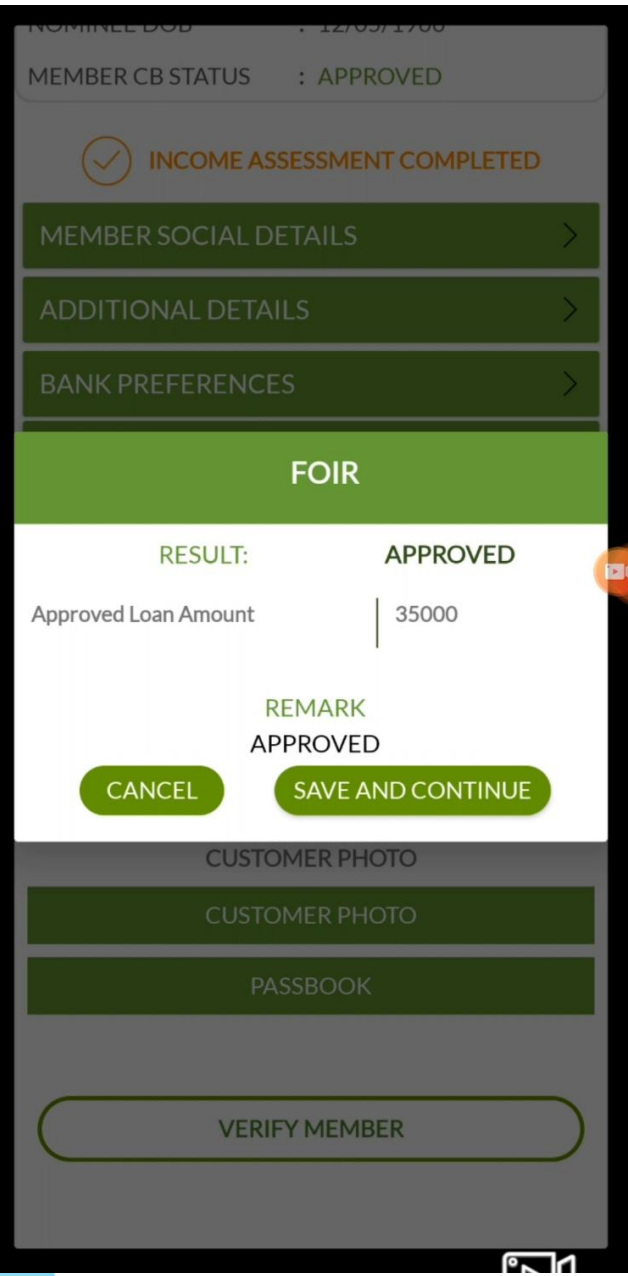
- Enter the details of Household Income and Household expenses
- **Note:** For Household income and expenses, the amount should be either 0 or greater than 100

Others	0
<b>Obligations</b>	
<b>MFI Loan</b>	
Existing MFI Loan	0
Existing MFI EMI	426
MFI Remaining Tenure	0
<b>Vehical Loan</b>	
Vehical Loan	0
Veihcal Loan EMI	426
VL Remaining Tenure	0
<b>Mortgage Loan</b>	
Mortgage Loan	0
Mortgage Loan EMI	426
ML Remaining Tenure	0
<b>Consumer durable loan</b>	
Consumer durable loan	0

Vehical Loan	0
Veihcal Loan EMI	426
VL Remaining Tenure	0
<b>Mortgage Loan</b>	
Mortgage Loan	0
Mortgage Loan EMI	426
ML Remaining Tenure	0
<b>Consumer durable loan</b>	
Consumer durable loan	0
DL EMI	142
DL Remaining Tenure	0
Total Monthly Irregular Expense	0
Total Household Monthly Expenses	1110
Total HouseHold Monthly Obligation	1420

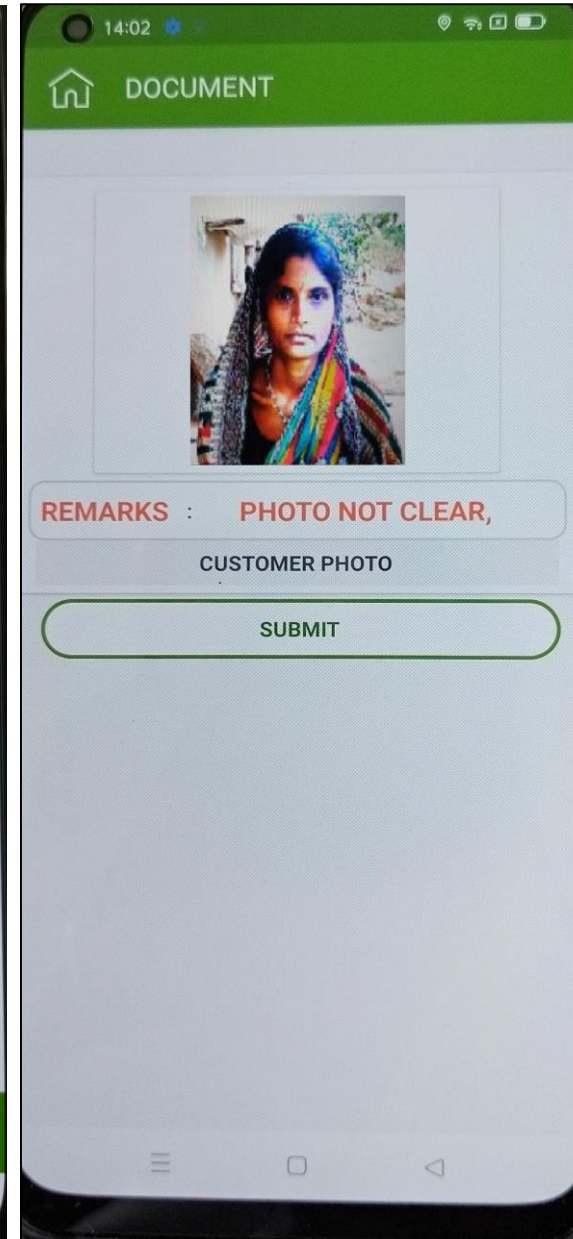
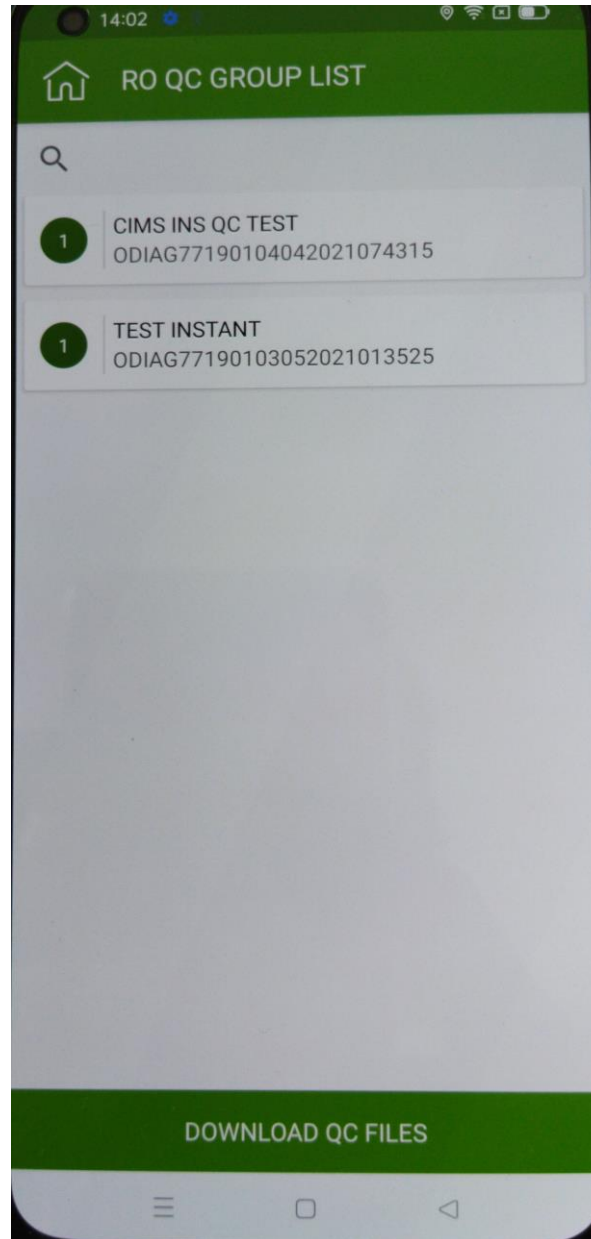
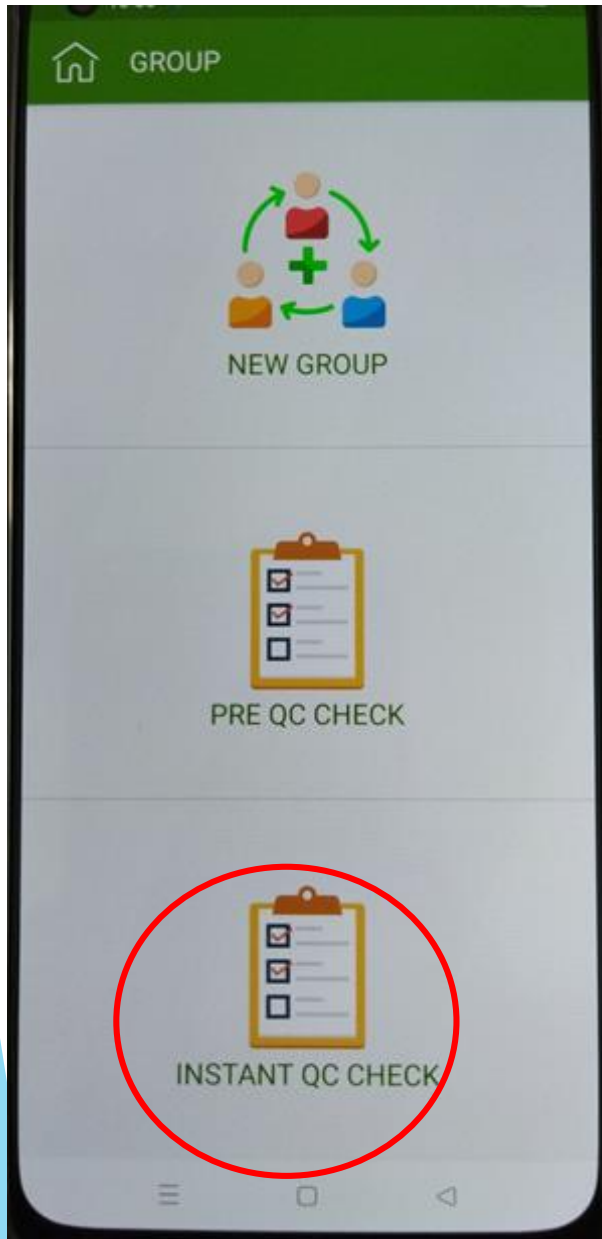


- Obligations data will be automatically filled from CB.
- Once all the data provided, 'Click Submit'.



- FOIR Result will pop-up in the screen.
  1. If Approved, Click Save and Continue.
  2. If Rejected, Click Cancel.
- 'Income Assessment Completed' shown in the screen, fill the other given data.
- Then upload member secondary kyc, nominee kyc, member photo and bank passbook.
- Then click 'Verify Member'

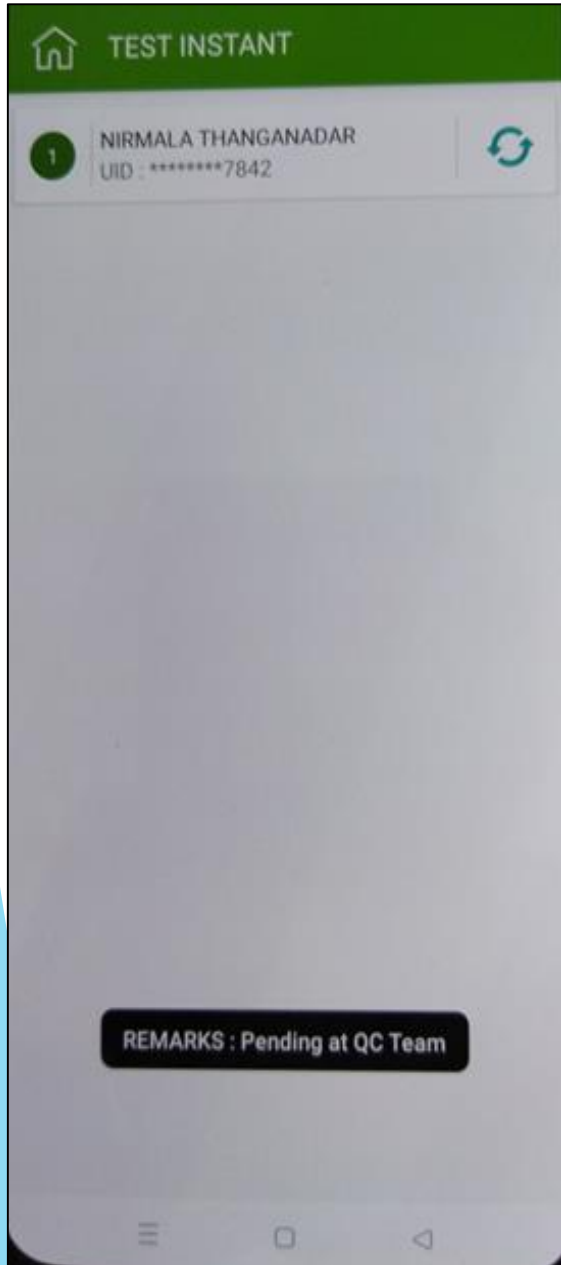
## INSTANT QC QUERY RESOLVING



### Instant QC Resolving

1. Click on “Instant QC Check”
2. Select respective Center from “RO QC Group List”
3. Find the discrepancy details and resolve the Query by uploading the Correct & Clear Document

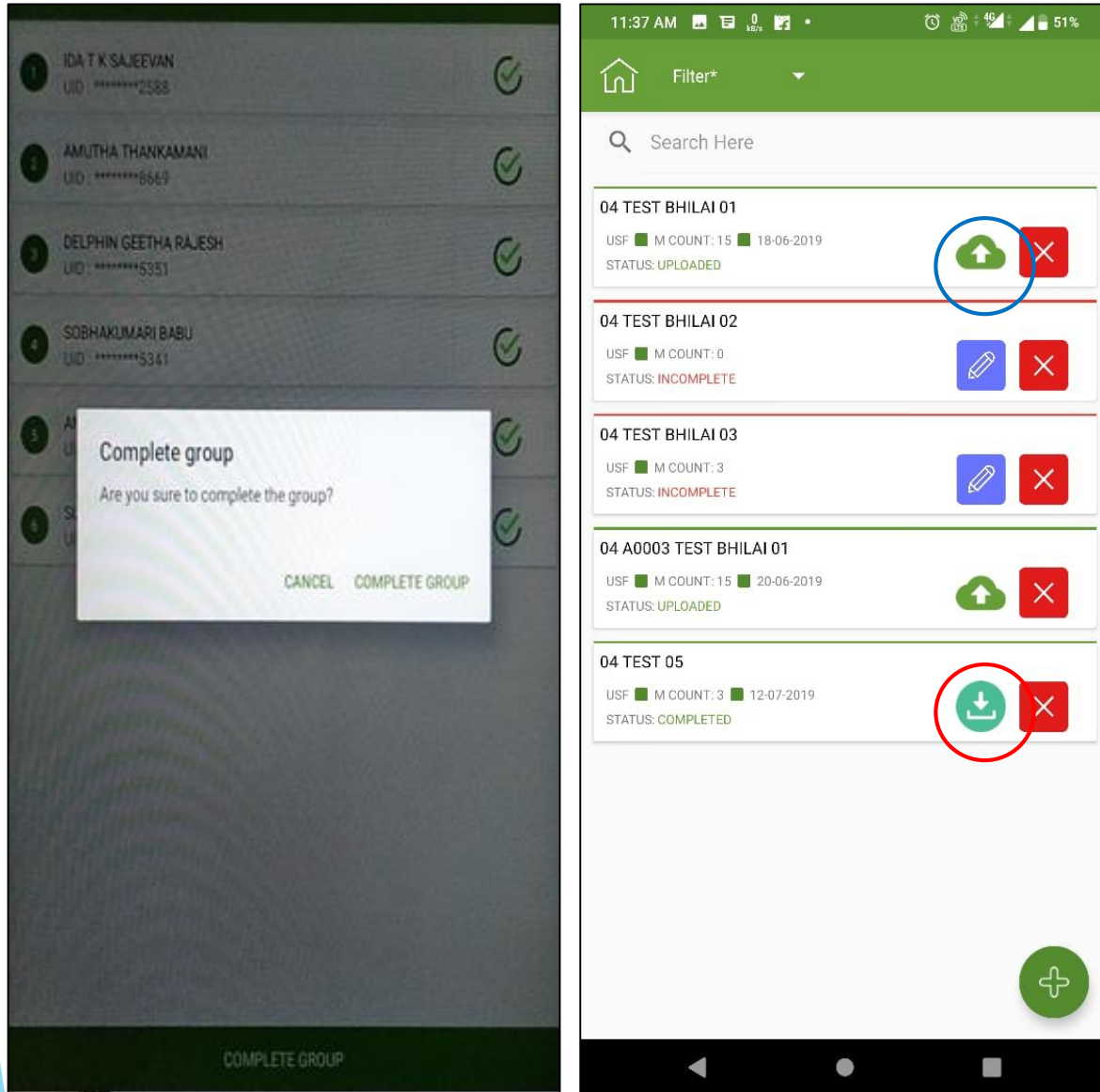
## INSTANT QC REMARKS-AVAILABLE IN DATA ENTRY OPTION



### **Instant QC Query Status**

1. Pending at QC Team-Backend team has to check & revert
2. Discrepancy –RO has to clear the Query
3. Approved –Query Cleared

## GROUP UPLOAD TO CLOUD



1. Once sourcing is over, press **“Complete Group”**
2. Home -> New Groups -> Press Download button as Highlighted in **Red round**
3. Home -> New Groups -> Press Cloud Symbol **Blue Round** to “Export Group” to Cloud
4. Exported file will be downloaded at Zonal office for further Process

*Thank you..*