

CollectX

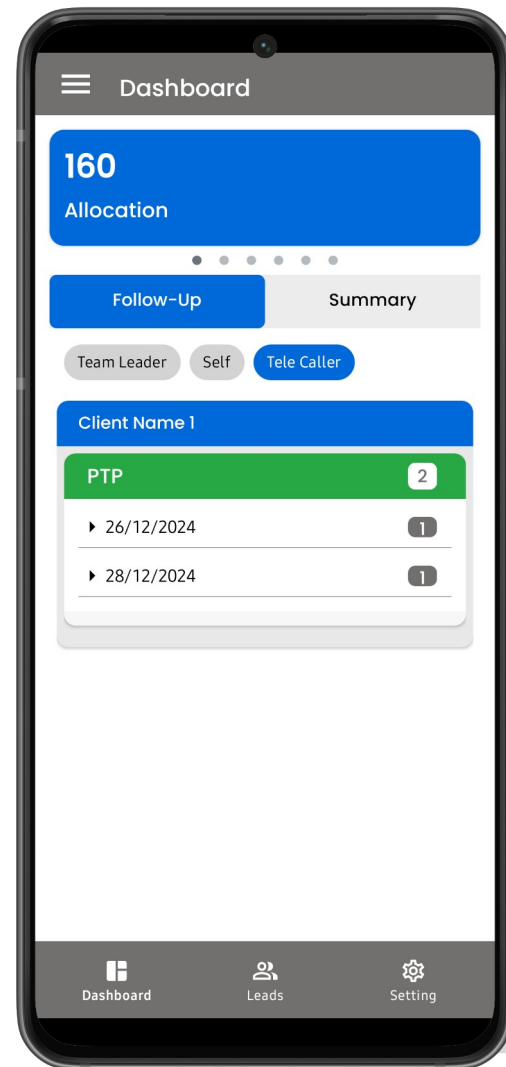
NextGen Field Application



CODE FIRST
IT HUB

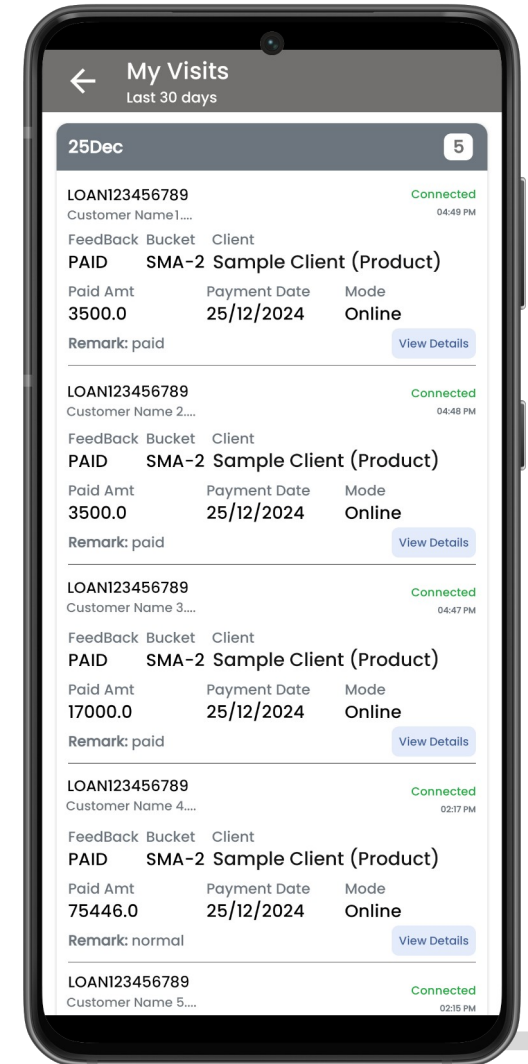
Dashboard

- ◆ Users can easily track their allocation-related information through the dashboard, providing a clear overview of their tasks and responsibilities.
- ◆ Additionally, they can access both their own and their colleagues' follow-up details and feedback summary.
- ◆ The dashboard enhances productivity by centralizing all relevant information in one place.



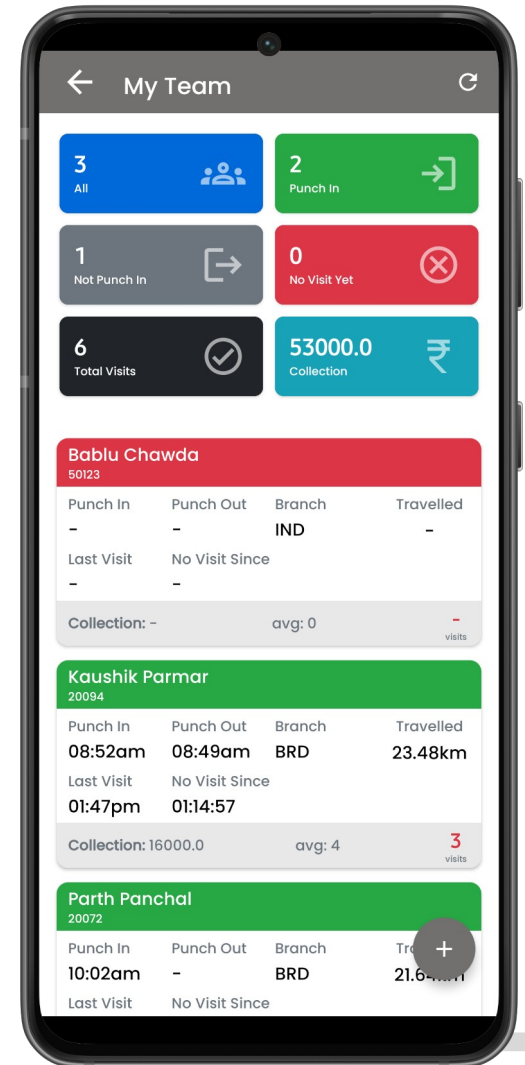
My Visits

- ◆ The "My Visits" feature displays a history of the user's visits for the last 30 days.
- ◆ It shows visit counts by date along with detailed information for each visit.
- ◆ This helps users easily track their activity and review past visits.
- ◆ This feature provides a clear overview of visit, improves time management and supports better follow-up actions based on past interactions.



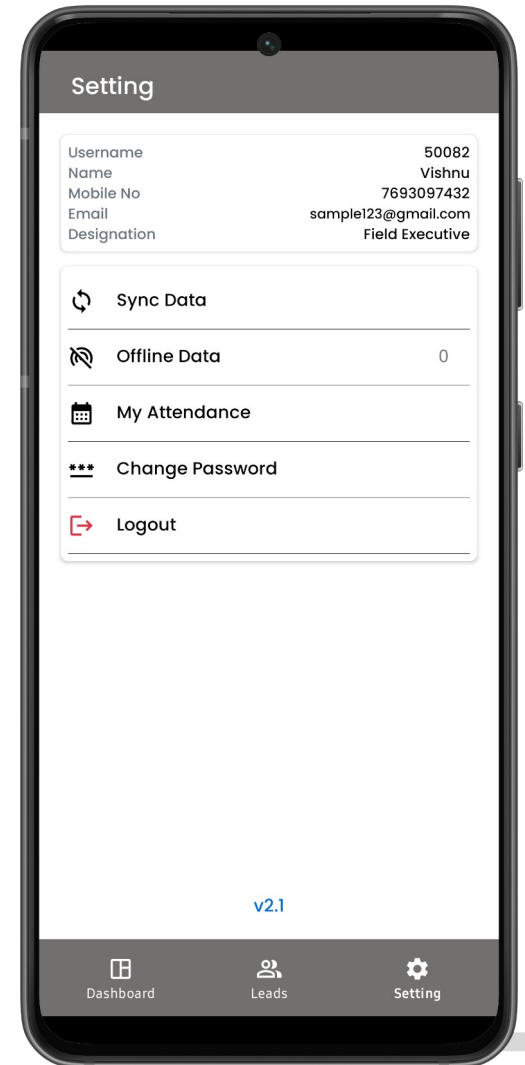
My Team

- ◆ "My Team" action provides a team summary including total members, count of users who punched in and those who did not, total visits and total collection.
- ◆ It also highlights each user in green if they have punched in and red if they have not. Also, it provides detailed information such as punch-in and punch-out times, total traveled distance in kilometers, last visit time and no visit since. Additionally, it shows total visits, collected amount for the day and average visits for the month.
- ◆ This feature helps team leaders monitor team performance and track individual activities.



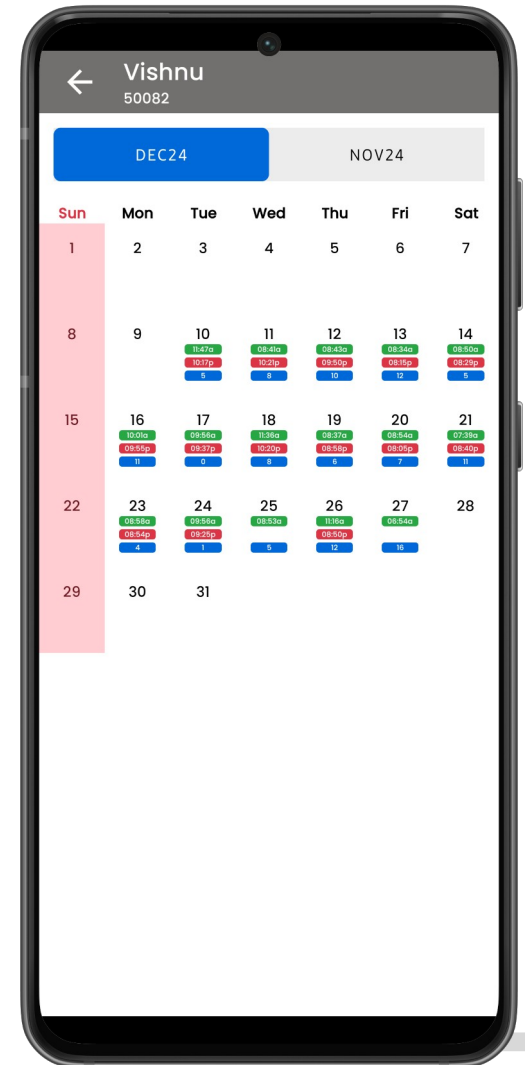
Setting

- ◆ Users can view their own primary details, providing quick access to essential information.
- ◆ By syncing data, they can also retrieve all leads, customer contacts and address information directly from the server. This ensures up-to-date and comprehensive data availability for efficient management.
- ◆ Users can view their current and previous month's attendance under "My Attendance" section.
- ◆ Additionally, they have the ability to change their account password for added security and privacy.



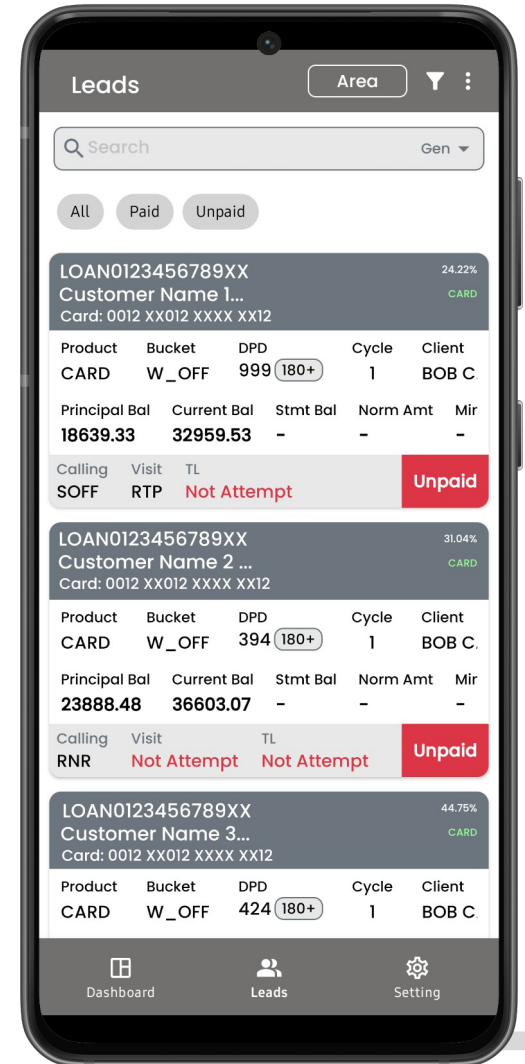
My Attendance

- ◆ Users can track their attendance for the current and previous month including daily login and logout time.
- ◆ The system also provides a visit count for each day, offering a detailed view of their activity.
- ◆ This feature allows users to monitor their work patterns effectively.
- ◆ Additionally, it ensures complete transparency and accuracy for their attendance records.



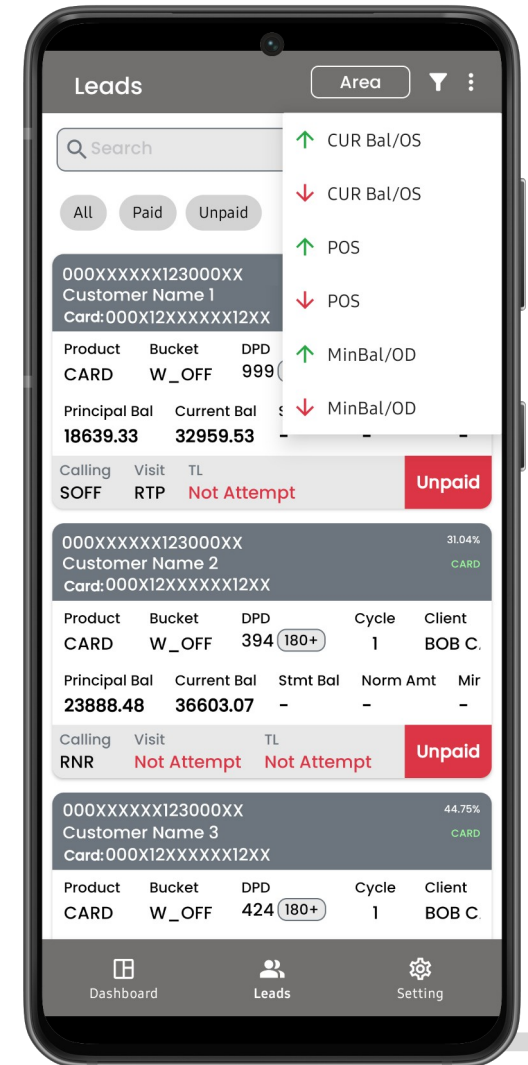
Leads

- Users can view a detailed list of all leads, including loan acc. numbers, customer names and client details.
- The list highlights payment status: PAID cases in green and UNPAID cases in red, making it easy to identify status of each case.
- Additionally, the app offers soft filters for PAID/UNPAID cases along with search, area and advanced filters for refined searches.
- The list also includes feedback from the calling agent, team leader, and user, providing a complete overview of each lead's status and progress.



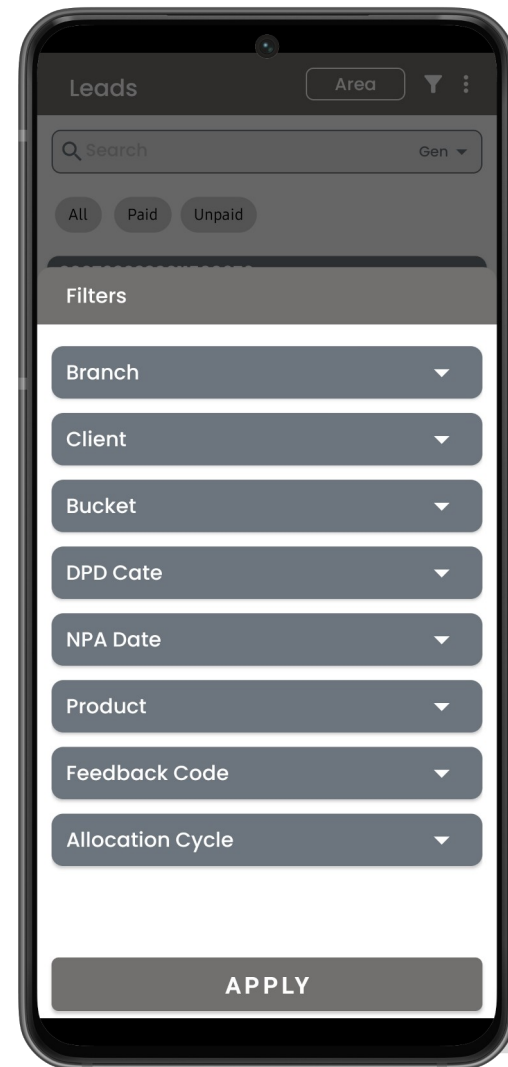
Leads

- ◆ Users can sort leads in ascending or descending order by CUR Bal/OS, POS, and Min Bal/OD.
- ◆ This sorting feature helps users quickly prioritize leads based on key financial metrics.
- ◆ It improves decision-making, allowing users to focus on the most relevant or urgent cases, enhancing efficiency and productivity.



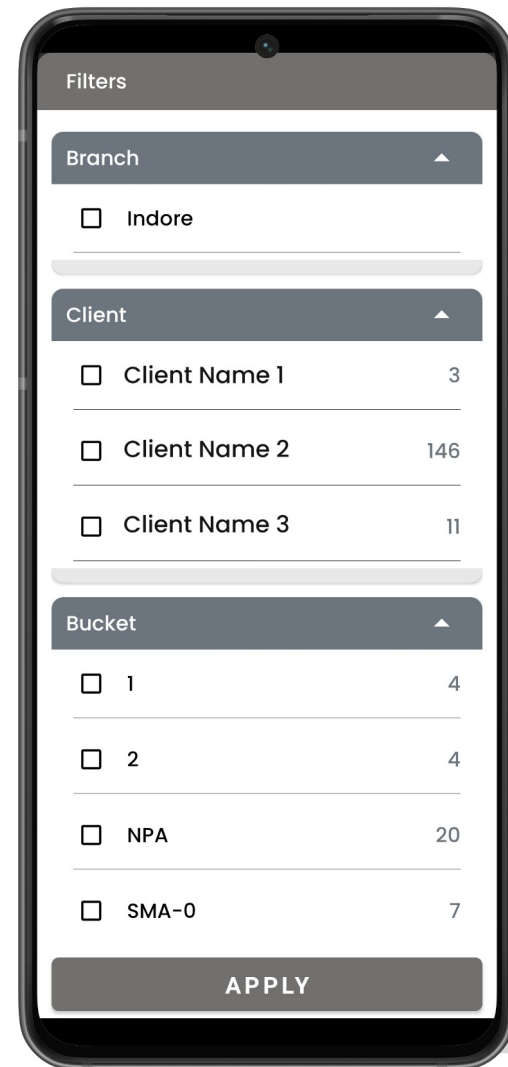
Advanced Filters

- ◆ The app provides an advanced filter that allows users to refine leads by Branch, Client, Product, Bucket, DPD Category, NPA Date, Feedback Code, and Allocation Cycle.
- ◆ This feature helps users quickly obtain specific results based on their criteria, improving efficiency and decision-making.
- ◆ It ensures a more focused and streamlined approach to lead management.



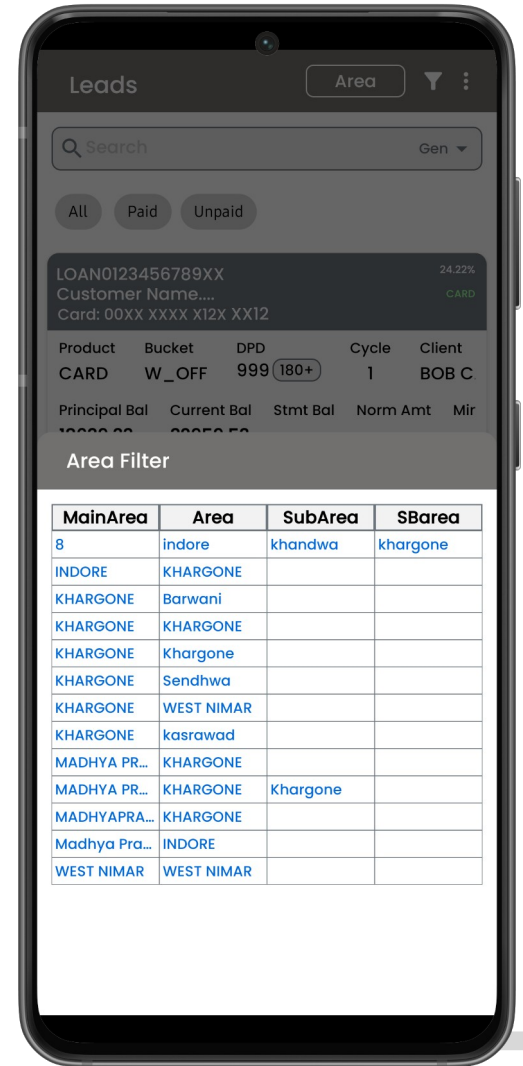
Advanced Filters

- ◆ The advanced filter view displays distinct values for each category from the leads, along with a count for each.
- ◆ This feature allows users to easily identify the distribution of leads across different categories.
- ◆ It streamlines the lead management process, making it quicker to focus on specific segments and improve data-driven decision-making.



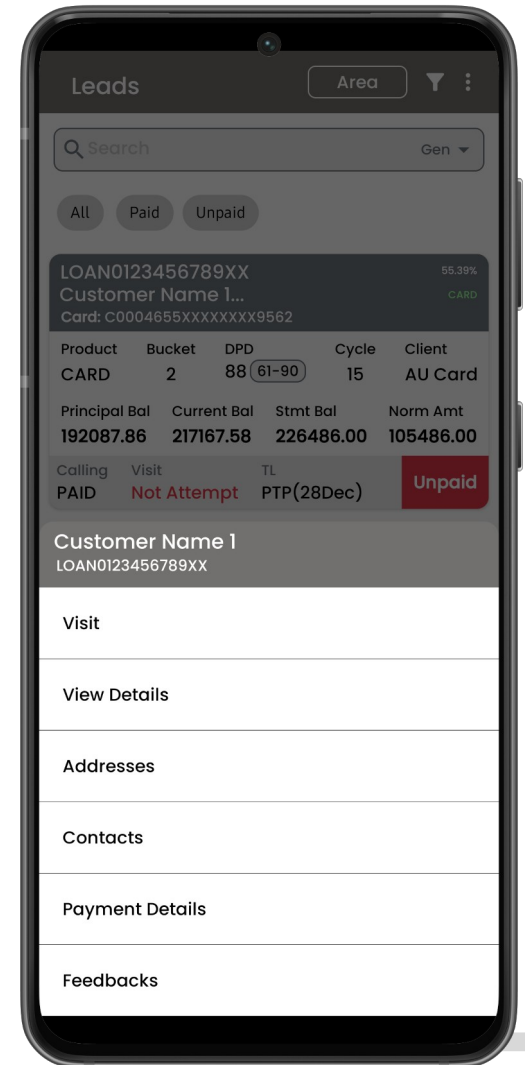
Filter By Area

- ◆ Users can filter leads by area, allowing them to search for Main Area, Sub Area, and SbArea.
- ◆ This feature enhances productivity by enabling users to focus on leads within their nearby regions.
- ◆ By easily accessing cases in close proximity, users can optimize their workflow and improve efficiency.
- ◆ It streamlines the process of managing leads in specific geographic locations.



Actions

- ◆ The app provides various actions when selecting a loan number, including the option to punch a visit for a particular loan.
- ◆ Users can also view detailed case information, access address and contact details, check payment history and view feedback submitted for the case.
- ◆ These features streamline the management and tracking of loan information.



Visit Feedback

- ◆ The visit action provides a form to enter feedback for a specific case, including details such as contactability, visited address, feedback code, payment amount and mode (if the feedback code is "paid" or "part paid").
- ◆ It also captures remarks along with any new contact, email or address information.
- ◆ The app also allows users to capture a photo with camera or upload one from the gallery to attach to the visit.
- ◆ It captures the user's current location while punching feedback to prevent fake or inaccurate entries.

11:21 82%

Visit Feedback

Customer Name...

Online ▾ Receipt/Ref. No.

three thousand three hundred ten en

Visited Address *

B/2 SAI SRADHA ROW HOUSE SURAST DARS... ▾

New Contact 1

Contact No. 📞 👤

New Contact 2

Contact No.

Email

Email

New Address

Customer New Address 📍

Remarks *

test (already paid case)

+ 📷

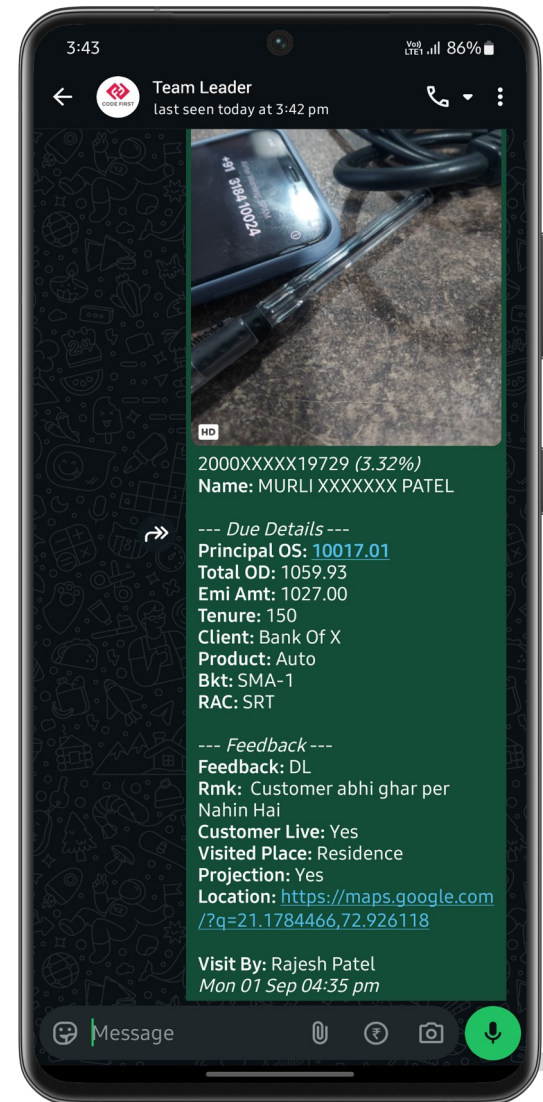
Camera 📷

Gallery 🖼️

SAVE

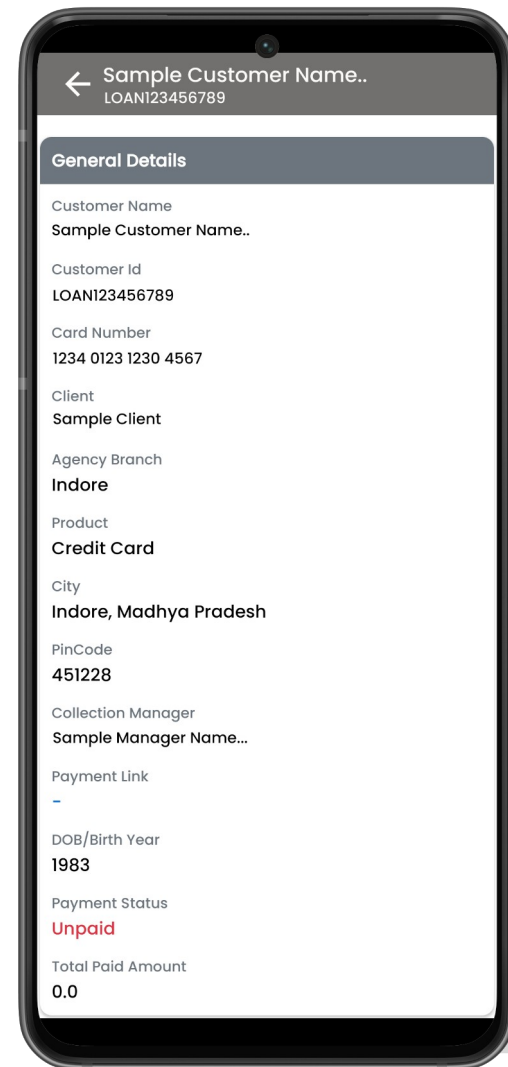
Visit Confirmation

- ◆ After successfully punching a visit, the user can view basic feedback details including the uploaded image during the visit.
- ◆ The app also provides a share feature, allowing users to share the visit details on other platforms.
- ◆ This enhances communication, enabling easy sharing of visit information with relevant authorities.
- ◆ The feature streamlines reporting, improves transparency and saves time in sharing updates.



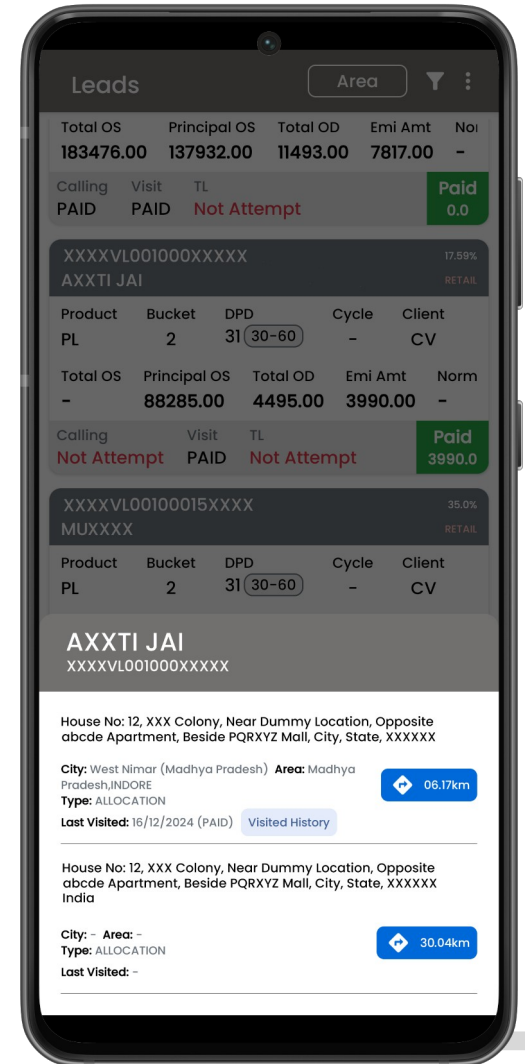
View Customer Details

- ◆ The view details action offers comprehensive information for a specific case including General Details, Due Details, Other Details and Distribution Details.
- ◆ This feature helps users quickly access key data, streamlining case review and decision-making.
- ◆ It improves efficiency by consolidating all essential information in one place.
- ◆ It enhances the user experience by providing a clear, organized view of all relevant case information, reducing the time spent searching for details.



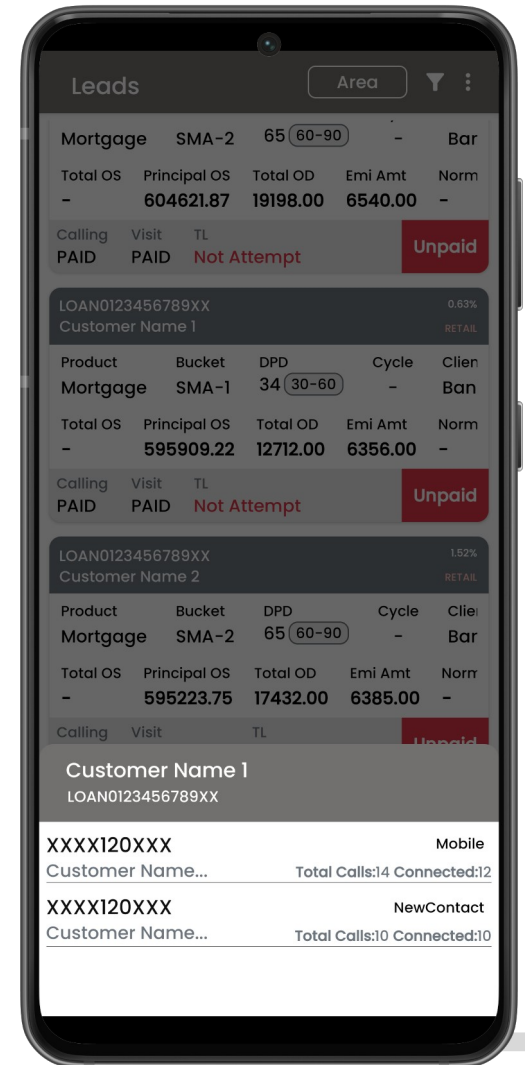
Customer Addresses

- ◆ The addresses action displays all the addresses associated with a particular customer that the user can visit.
- ◆ It also provides the type of address source, last visited date & feedback code for each address and visit history.
- ◆ Additionally, the app calculates and shows the distance of each address from the user's current location.
- ◆ This feature helps users efficiently plan visits, optimize travel time and stay organized, ultimately boosting overall productivity.



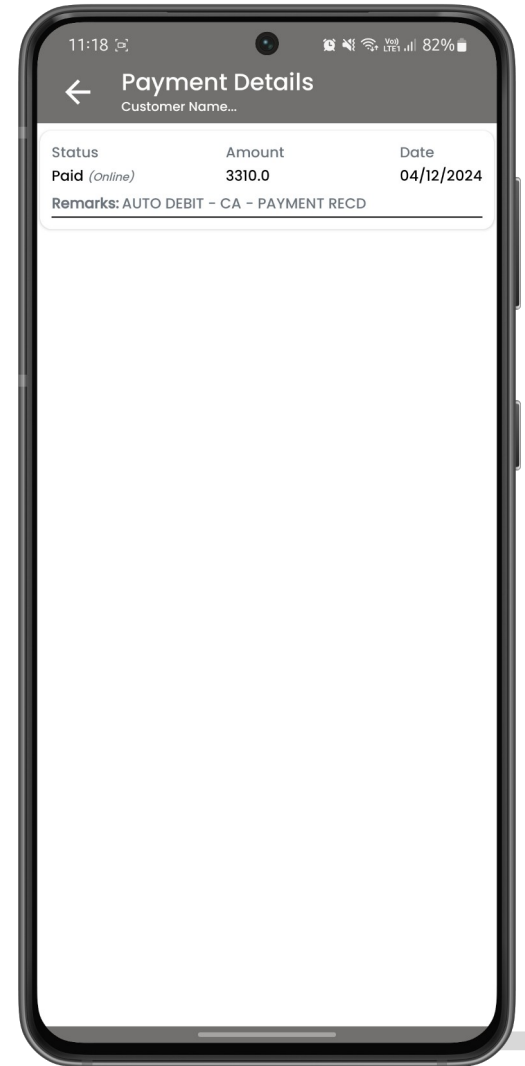
Customer Contacts

- ◆ The contacts action displays all contact numbers associated with a particular customer.
- ◆ It also includes the type of contact source, total calls made and the number of connected calls.
- ◆ This feature helps users efficiently reach out to customers.
- ◆ Applying data masking on contact numbers for data privacy.



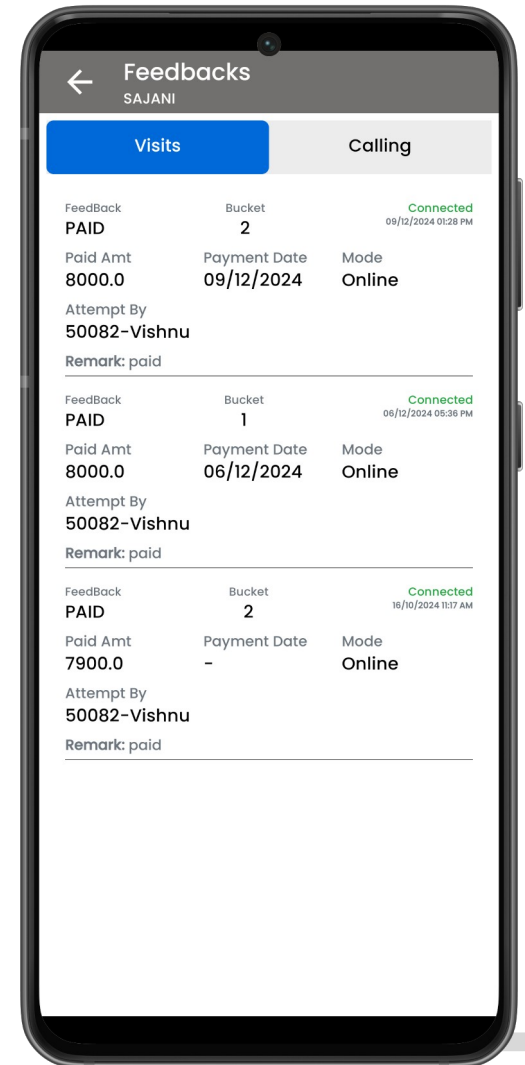
Customer Payment Details

- ◆ The payment details action shows all payment information for a particular customer.
- ◆ It includes payment status, payment mode, amount, payment date, and remarks associated with the payment.
- ◆ This feature helps users to track payment history, ensuring clarity and transparency in financial transactions.



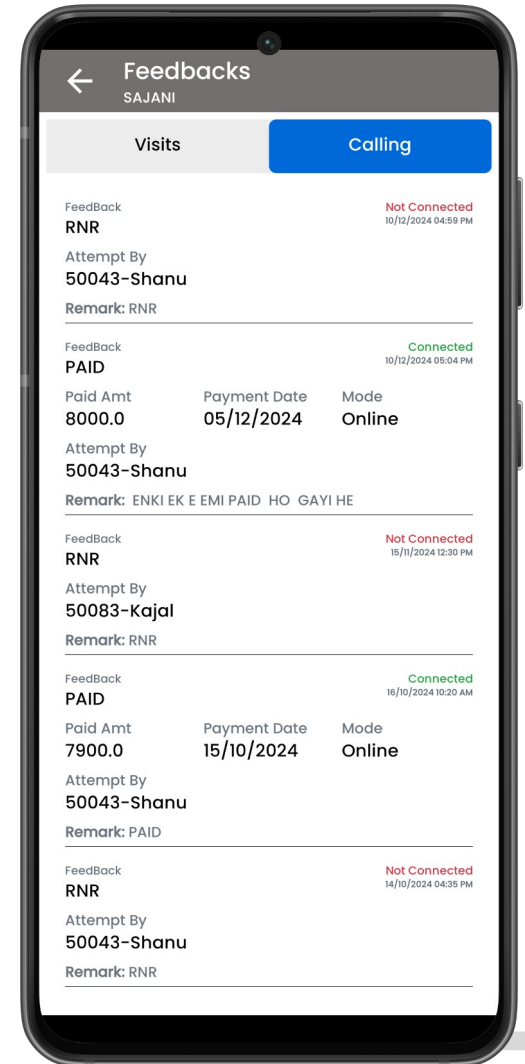
Visit Feedback History

- ◆ For visit feedbacks, it shows details entered by the user such as feedback code, remarks, and the agent who punched the feedback. Additionally, it includes payment-related information like the paid amount, payment date, and payment mode, if the feedback code is marked as "paid" or "part paid".



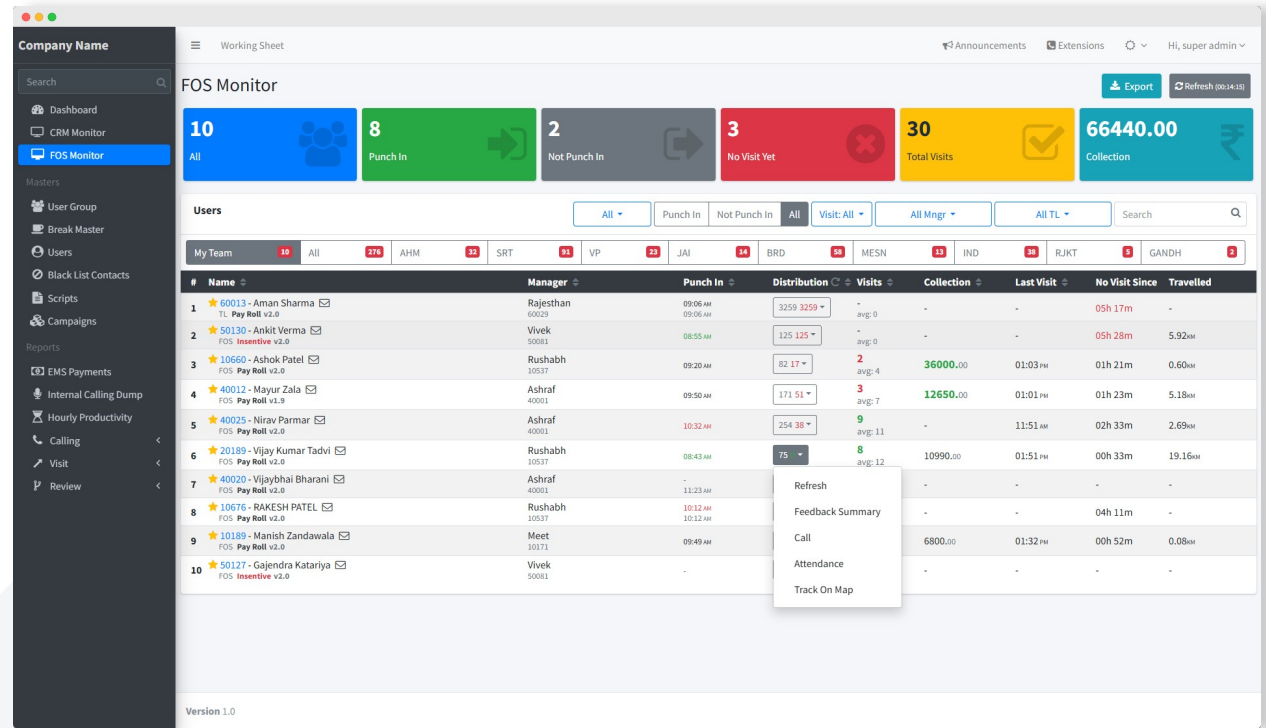
Calling Feedback History

- ◆ The Feedbacks action displays all feedback details saved from calls and visits.
- ◆ For calling feedbacks, it shows details entered by the calling agent, such as whether the customer was connected, feedback code, remarks and the calling agent who punched the feedback.
- ◆ Additionally, it includes payment-related information like the paid amount, payment date and payment mode, if the feedback code is marked as "paid" or "part paid."



FOS Monitor

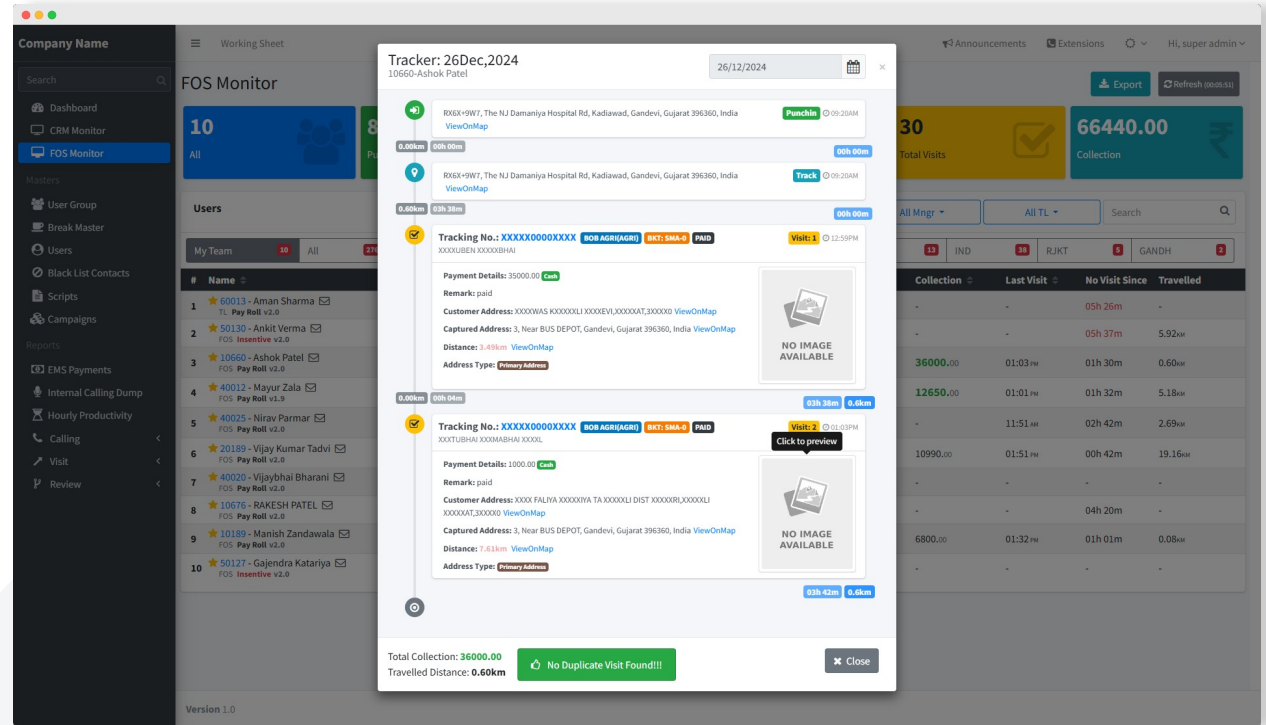
- FOS Monitor provides summary including total members, count of users who punched in and those who did not, total visits and total collection.



- It provides detailed information of each user such as punch-in and punch-out times, total traveled distance in kilometers, last visit time and other details.
- This feature provides real-time monitoring of users activity to ensure performance and track individual activities in single view.

Emp Tracker

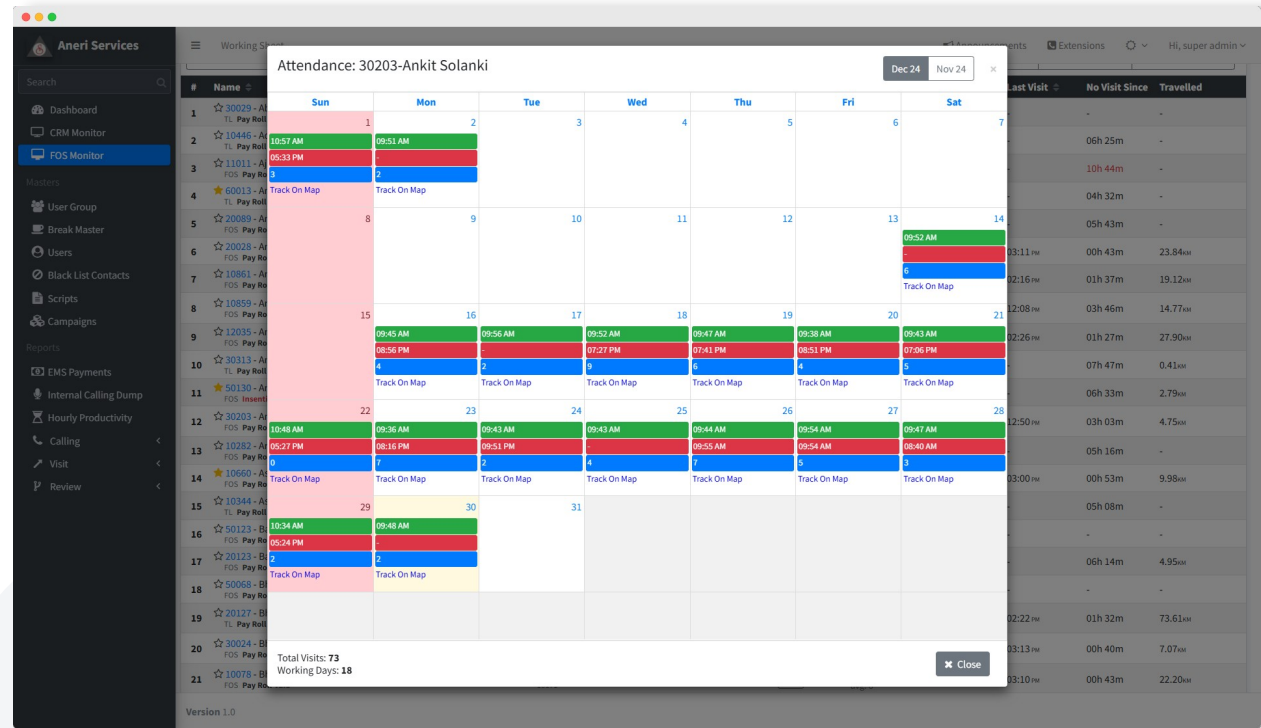
- ◆ The Employee Tracker displays user activity throughout the day, including punch-in, punch-out, visits, and the captured background location.



- ◆ It provides basic visit details, such as the feedback code and any documents uploaded by the user at the time of punching the visit.
- ◆ Additionally, it shows the distance from the user's location when the feedback was punched, which can also be viewed on a map.

Attendance

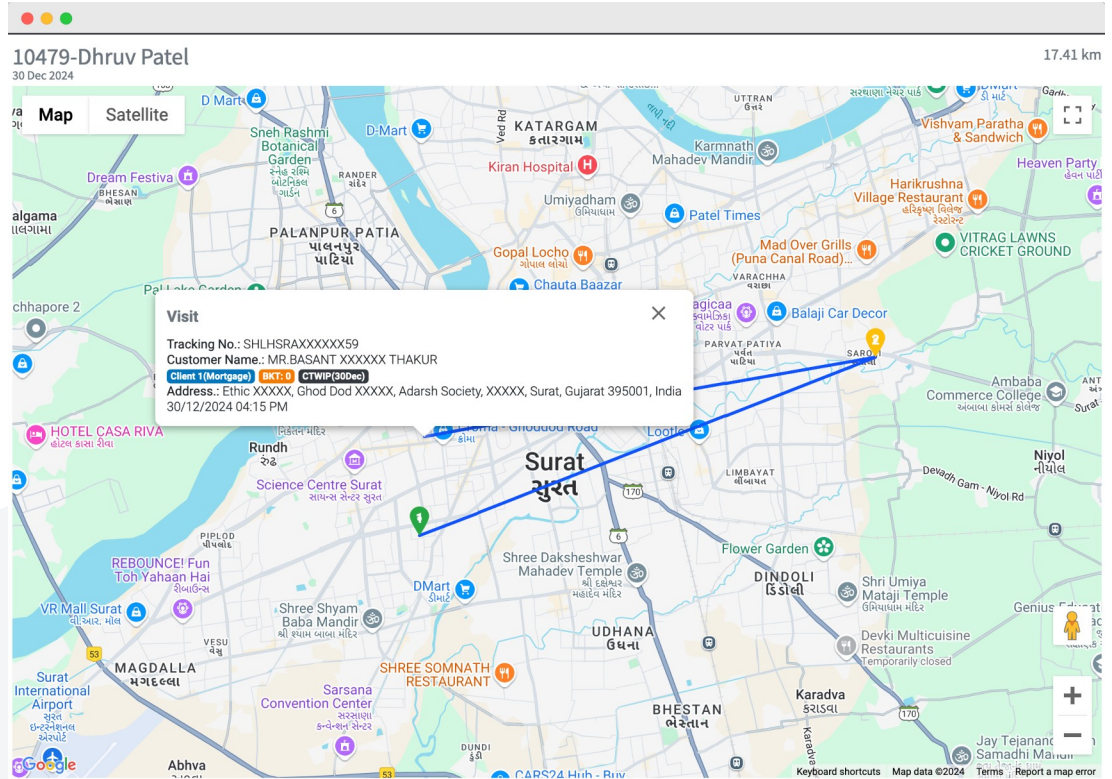
- ◆ User attendance for the current and previous month including daily punchIn ,punchOut time and visit count.

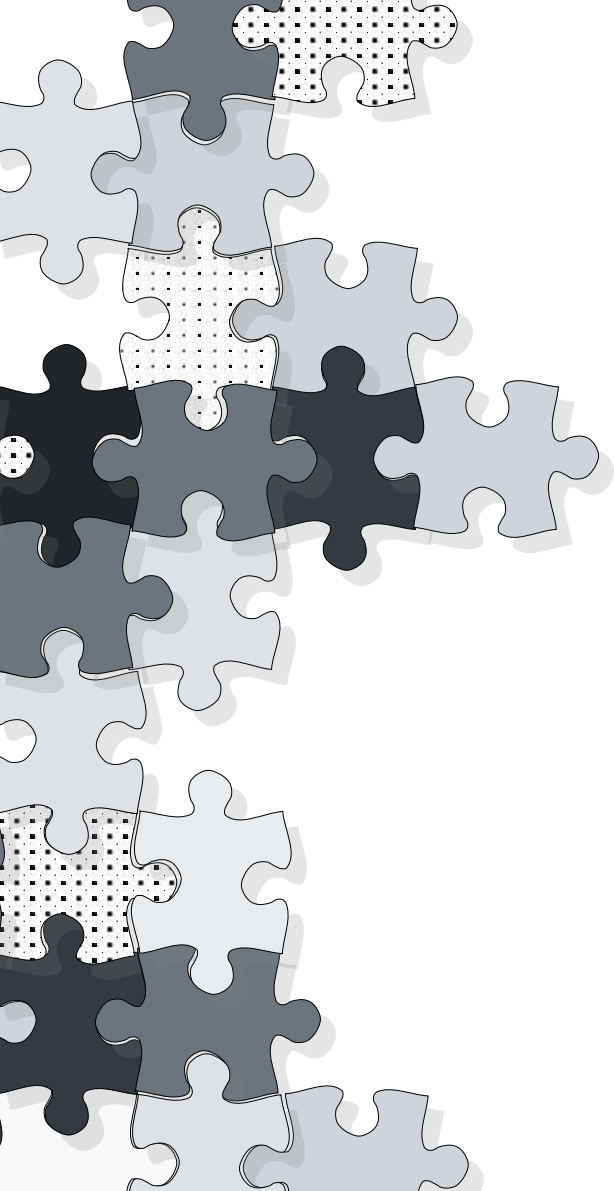


- ◆ This feature allows to monitor user's work patterns effectively. It ensures complete transparency and accuracy for each user's attendance records.
- ◆ Additionally, the user's entire day activity can be viewed on the map, providing a visual representation of their locations throughout the day.

Activity On Map

- ◆ This feature plots the user's punch-in, punch-out, visit locations, and total traveled distance , allowing team leaders or managers to track the employee's activities in real-time.
- ◆ By visualizing the data on map, it becomes easier to monitor the user's route, ensure they are following their schedule and confirm that visits are being completed at the correct locations.
- ◆ This enhances transparency, helps identify any discrepancies and improves overall work flow.





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Thank You!

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