CLF Profile Entry

User manuals Module 2
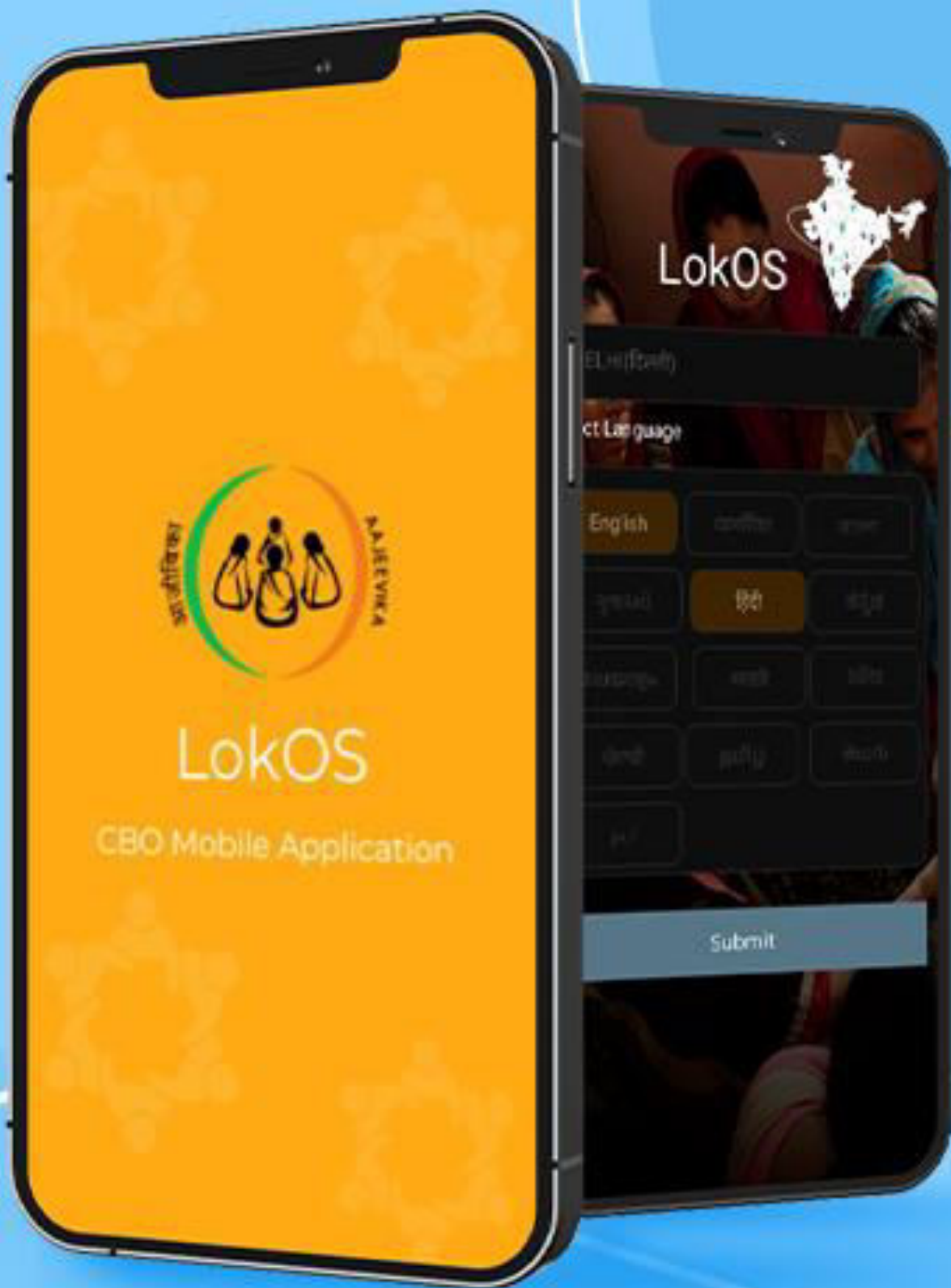
LokOS Mobile Application

Table of Contents

```
                              Login
                                │
            ┌───────────────────┴───────────────────┐
            ▼                                        ▼
       Existing CLF                              New CLF
            │                                        │
            ▼                                        ▼
      Synchronization                            (+) Click
            │                                        ┆
            ▼                                        ┆
      Complete Data                                  ┆
            │                                        ┆
            ▼                                        ┆
       Download                                      ┆
      mapped SHG ┄┄┄┄┄┄┄┄┄┐                          ┆
                          ┆                          ┆
                          ▼                          ┆
                    Basic Profile ┄┄┄┄┄┄┄┄┄┄┄┄┄┄┄┄┄┄┘
                          │
                          ▼
                     VO Mapping
                          │
                          ▼
              EC member mapping
           (OB and signatory identify)
                          │
                          ▼
              Complete other details
                          │
                          ▼
              Review and upload data
                          │
                          ▼
               Upload successful
                          │
                          ▼
                  Profile Locked
```
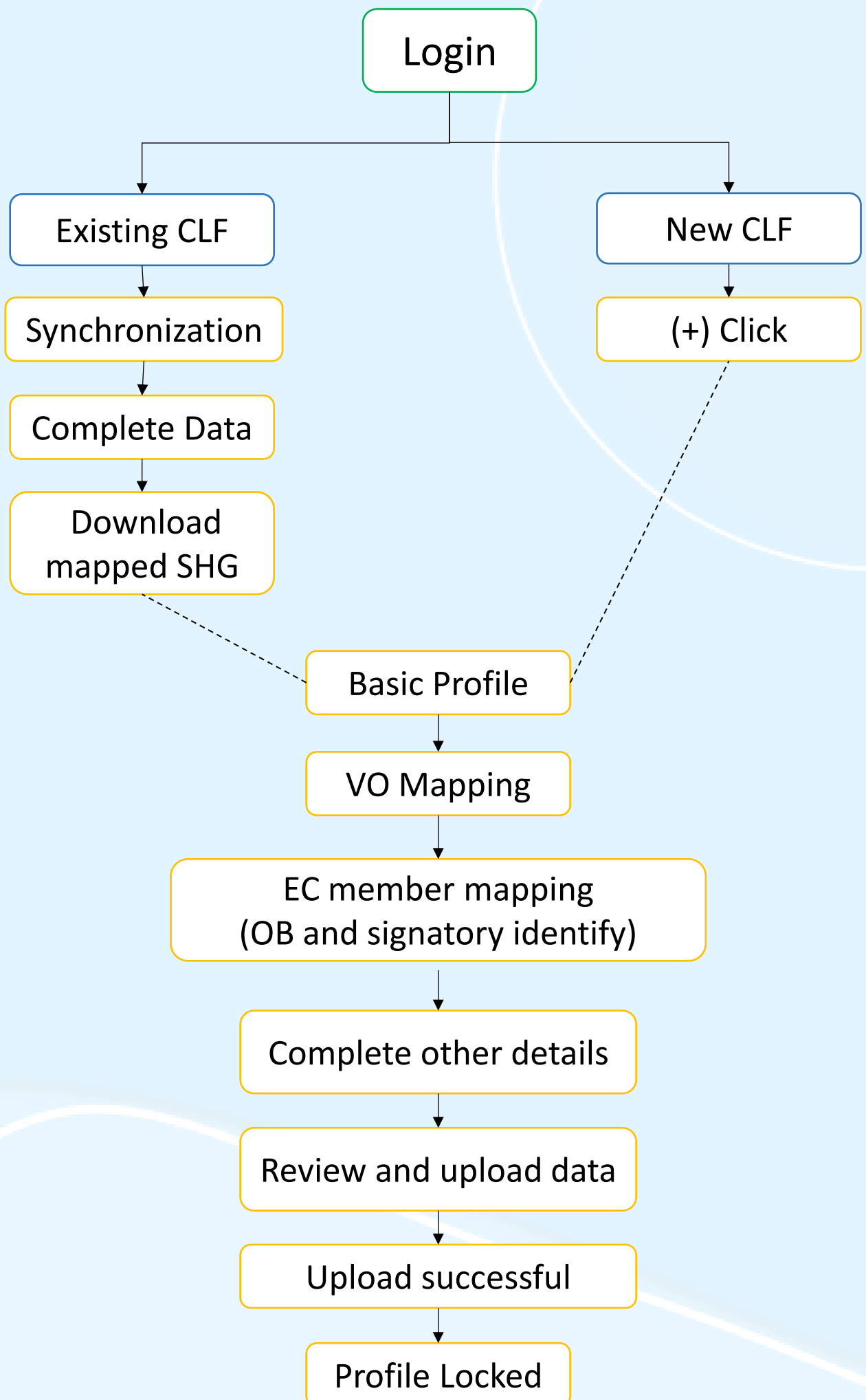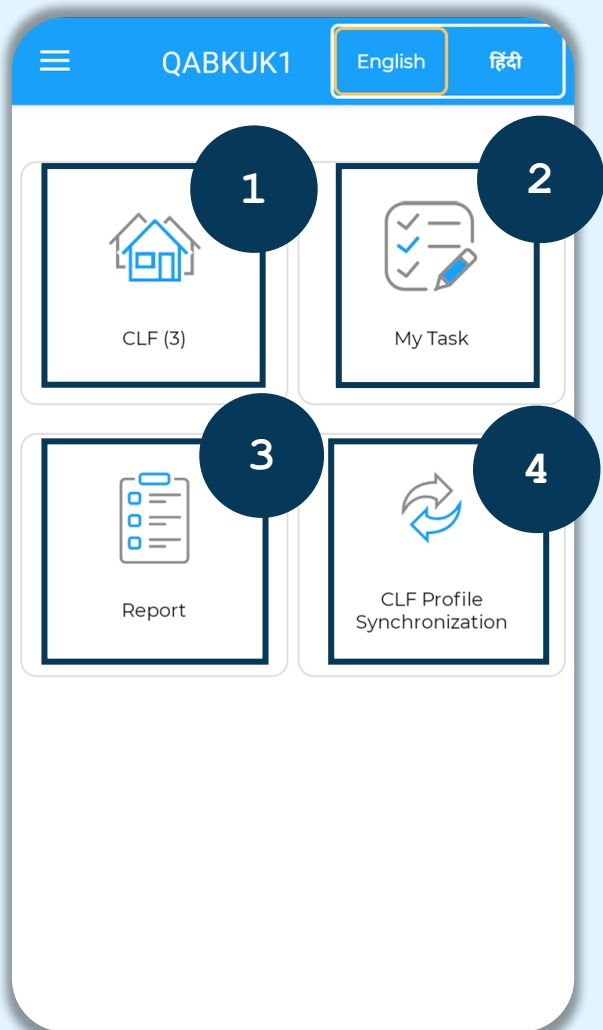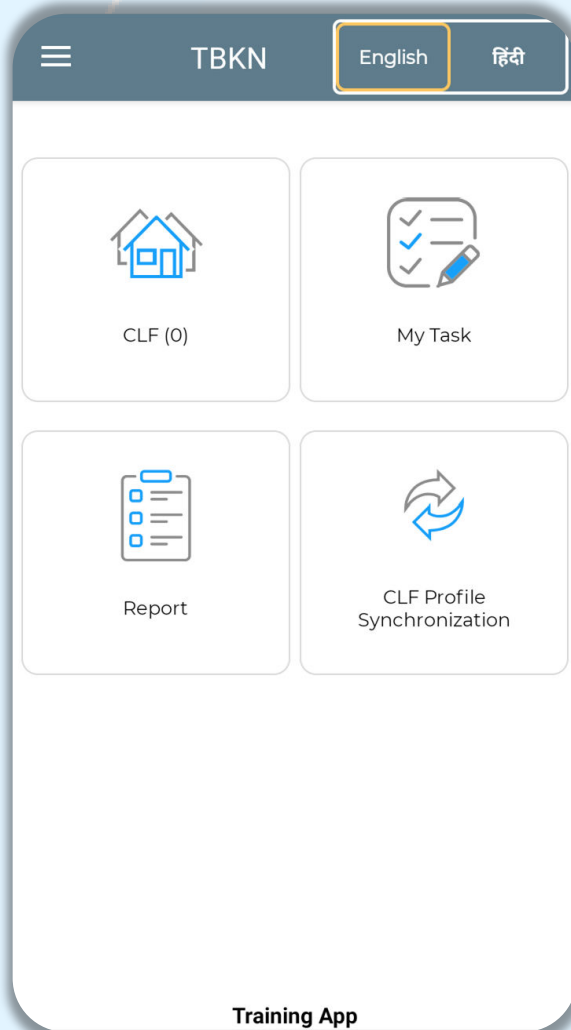
Live App Theme

Training App Theme

1	CLF - For creating new/editing the CLF profiles
2	Pending Tasks
3	For accessing the CLF Reports
4	Synchronization of the CLF data with the server

Note:

➢ LokOS Training App (Demo) and LokOS Live App differ in terms of colour themes. Training App can also be identified using the "Training App" text at the bottom
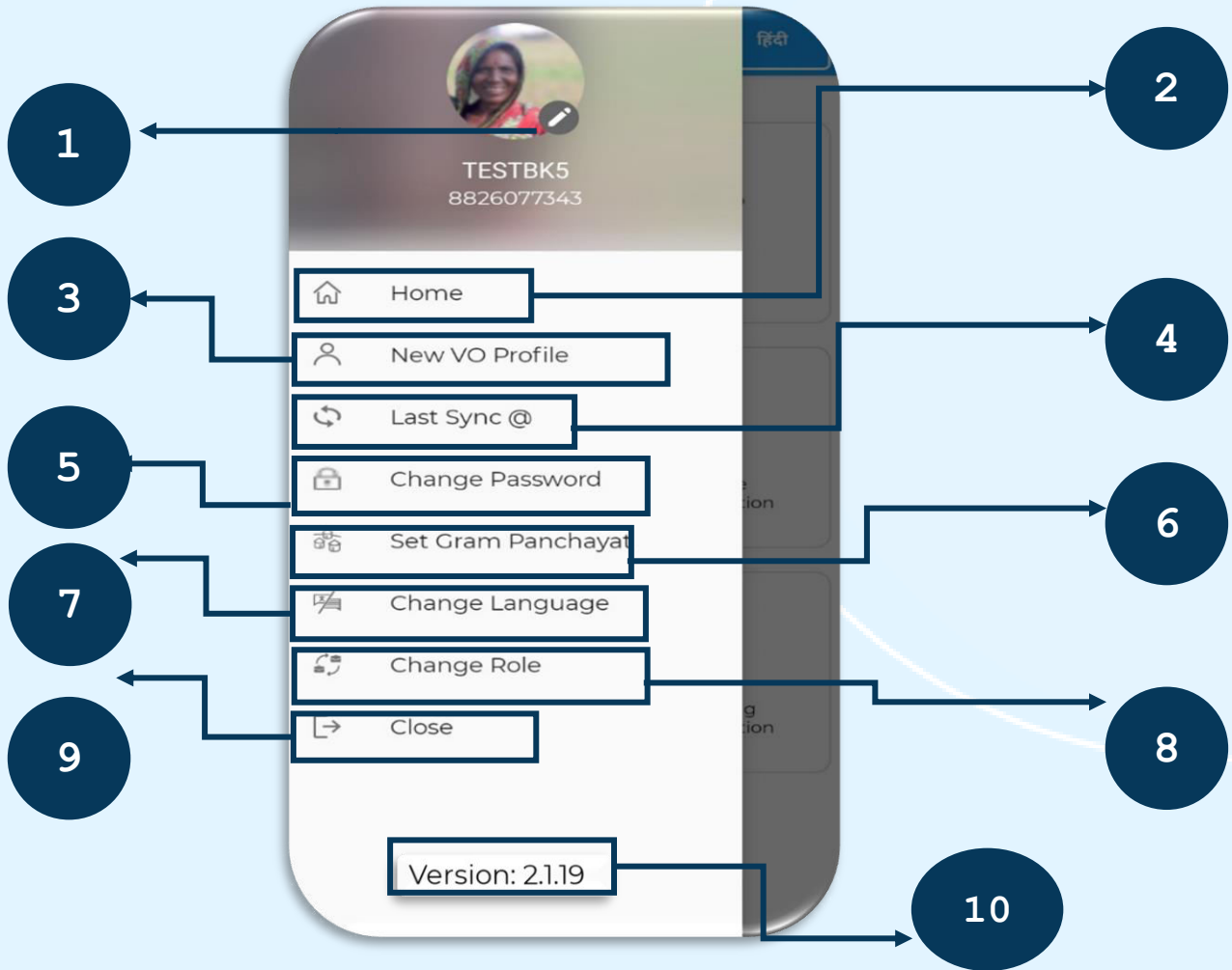
QABKUK1

English   हिंदी

CLF (3)

My Task

Report

CLF Profile
Synchronization

1

2

3
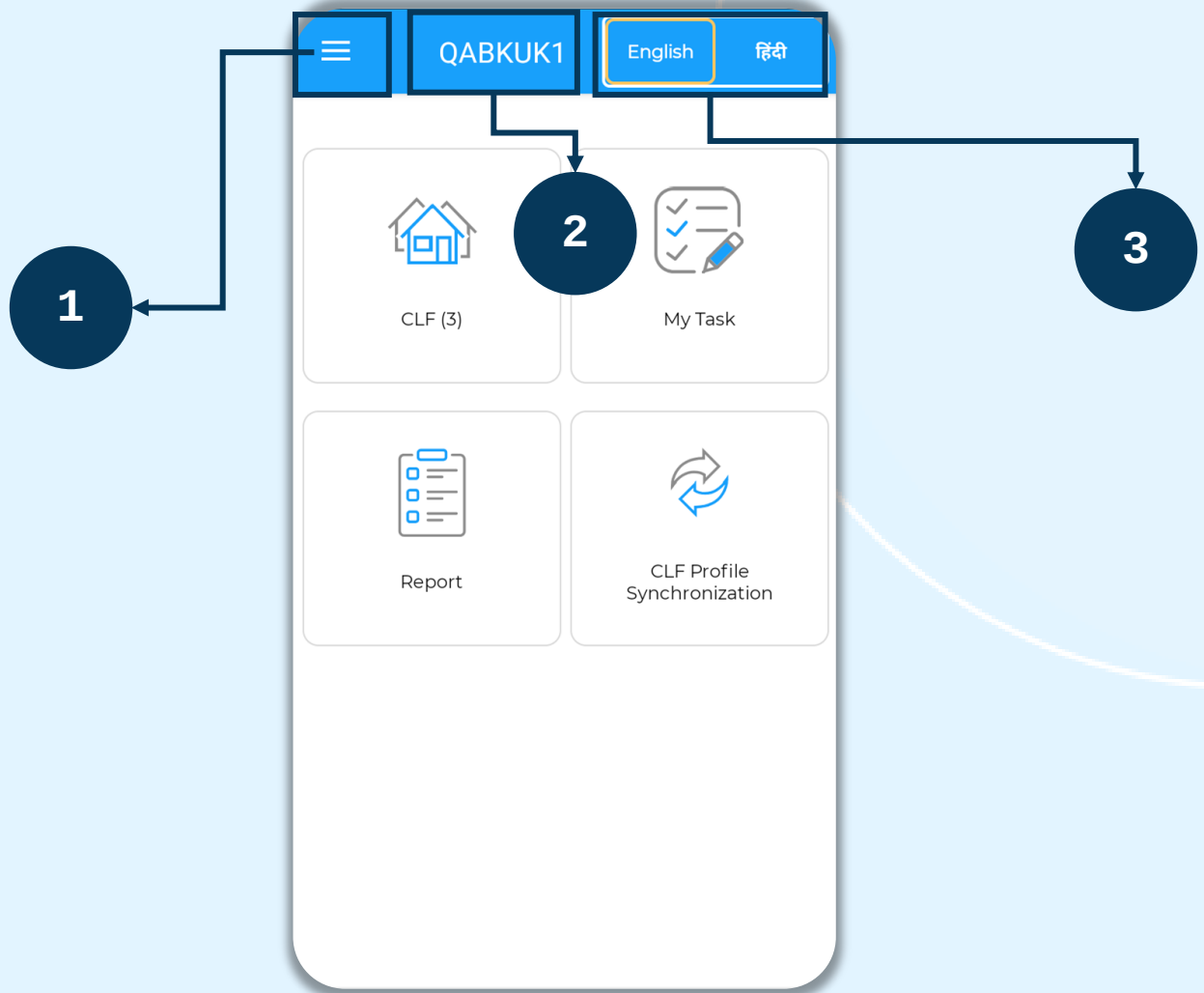
1	To access the Menu Screen
2	This section shows the user's name
3	To switch between English and the regional language

TESTBK5
8826077343

हिंदी

1	Home	
	New VO Profile	
	Last Sync @	
	Change Password	
	Set Gram Panchayat	
	Change Language	
	Change Role	
	Close	

Version: 2.1.19

1	Can update the user image from edit icon
2	The user will land on the Home Page
3	The user will be able to create a new CLF
4	The user will see the last synchronization date
5	The user can change the Password
6	The user can the view Block
7	The user can change the Regional Language
8	The user can change their Login Role
9	To exit from the application
10	To check the application version

| Change Password |
| Set Block |
| Change Language |
| Change Role |
| Close |

Select Role

SHG Bookkeeper

VO Bookkeeper

VO-SHG Trans Approver

CLF Bookkeeper

CLF-SHG Trans Approver

1

3

Enter Username and Password

VO Bookkeeper

OR_PBK

Password

☐ Show Password

Log in

PUNJAB(ਪੰਜਾਬ)

Select Language

English	असमीया	বাংলা
গুজরাती	हिंदी	ಕನ್ನಡ
മലയാളം	मराठी	ଓଡ଼ିଆ
ਪੰਜਾਬੀ	தமிழ்	తెలుగు
اردو		

Submit

2

1	Click◉( ) 'Change Role' then select the Role 👆
2	Click on the 'Submit' button
3	Enter the Password and click on 'Log in'

Note:

➤ Only users with multiple roles assigned by the Block Admin can change role

➤ After the first Change Role, only PIN will be required to Change Role
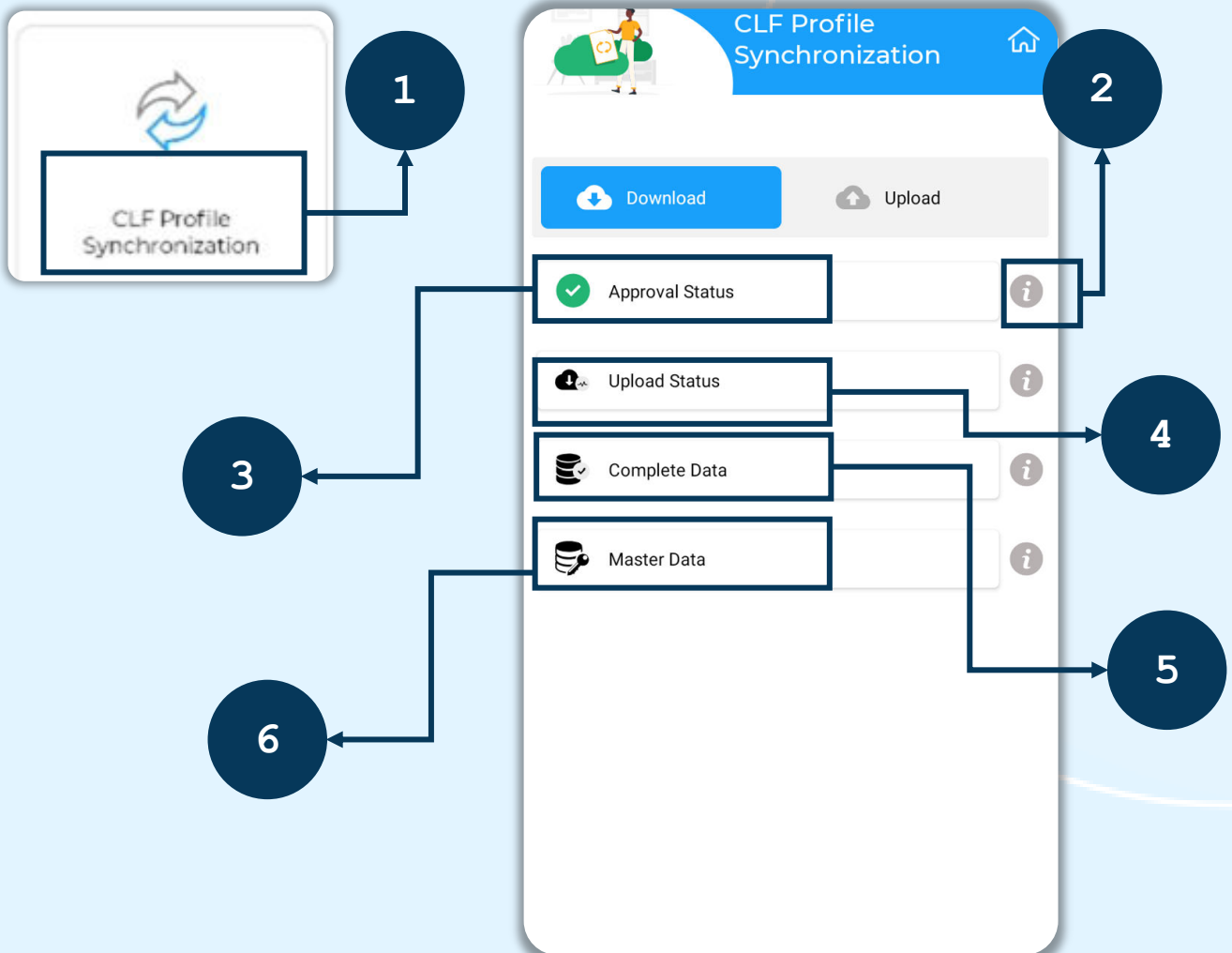
1	Click on the CLF Profile Synchronization
2	Click on the i-button to know the functionality of each option
3	Download the approval status after BPM's approval
4	Download the status of successful/unsuccessful upload
5	Download the CLF and members
6	Download the latest masters-Bank and Branch, Geography, Dropdowns and Labels

Note:

➢ After the first successful login, users can select the 'Download complete Data' option. If any CLF is linked with this user, the information will be downloaded on the mobile device

Style

1

QABKUP English हिंदी

CLF (1)

My Task

Report

CLF Profile Synchronization

2

CLF List

All ▼ Total CLF:1/1

A ARPAN PRERNA MAHILA SANKUL SANGH NAGAL
29005553 22-12-2016 0 ⋮

☐ Inactive CLF

3

➕

Pending for Approval (0) Active Group (1) Inactive Group (0)
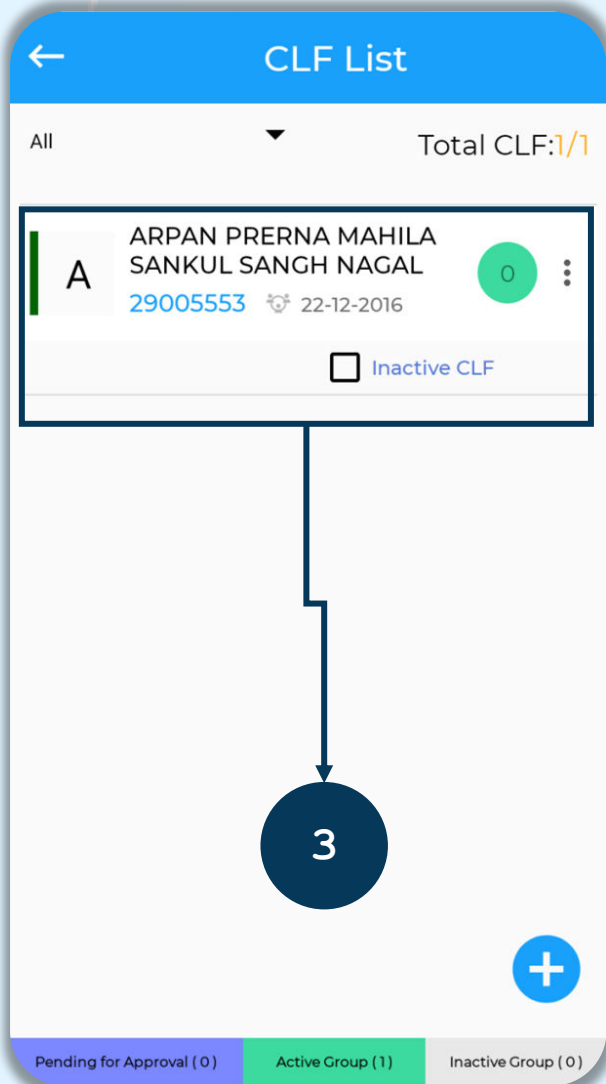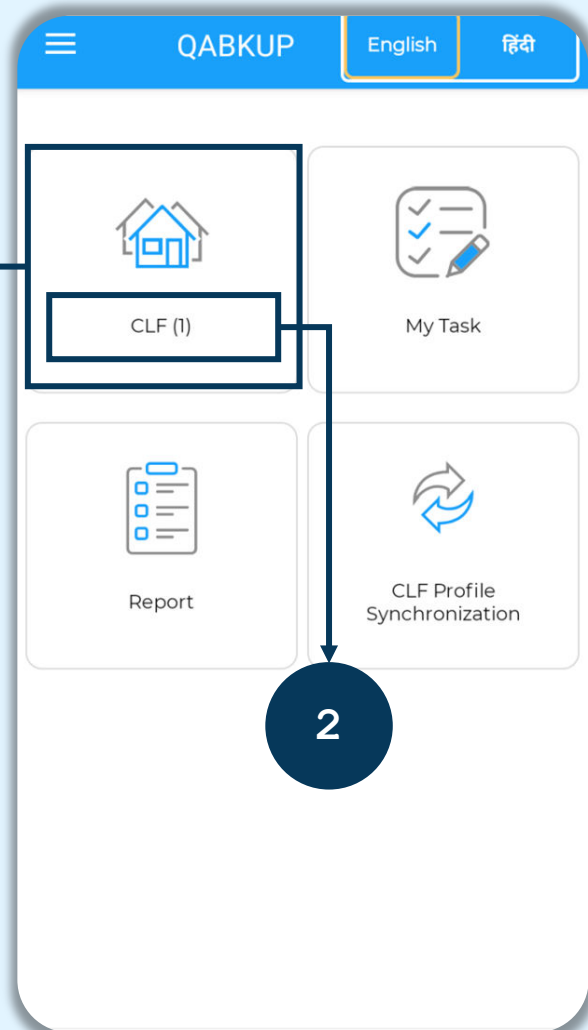
1	User will be able to create, view and edit CLF Profiles by clicking on the 'CLF' button
2	The number inside '( )' denotes the number of CLFs linked
3	The list of the CLFs will be based on Block selected. If 'All' is selected then all the linked CLFs would be shown
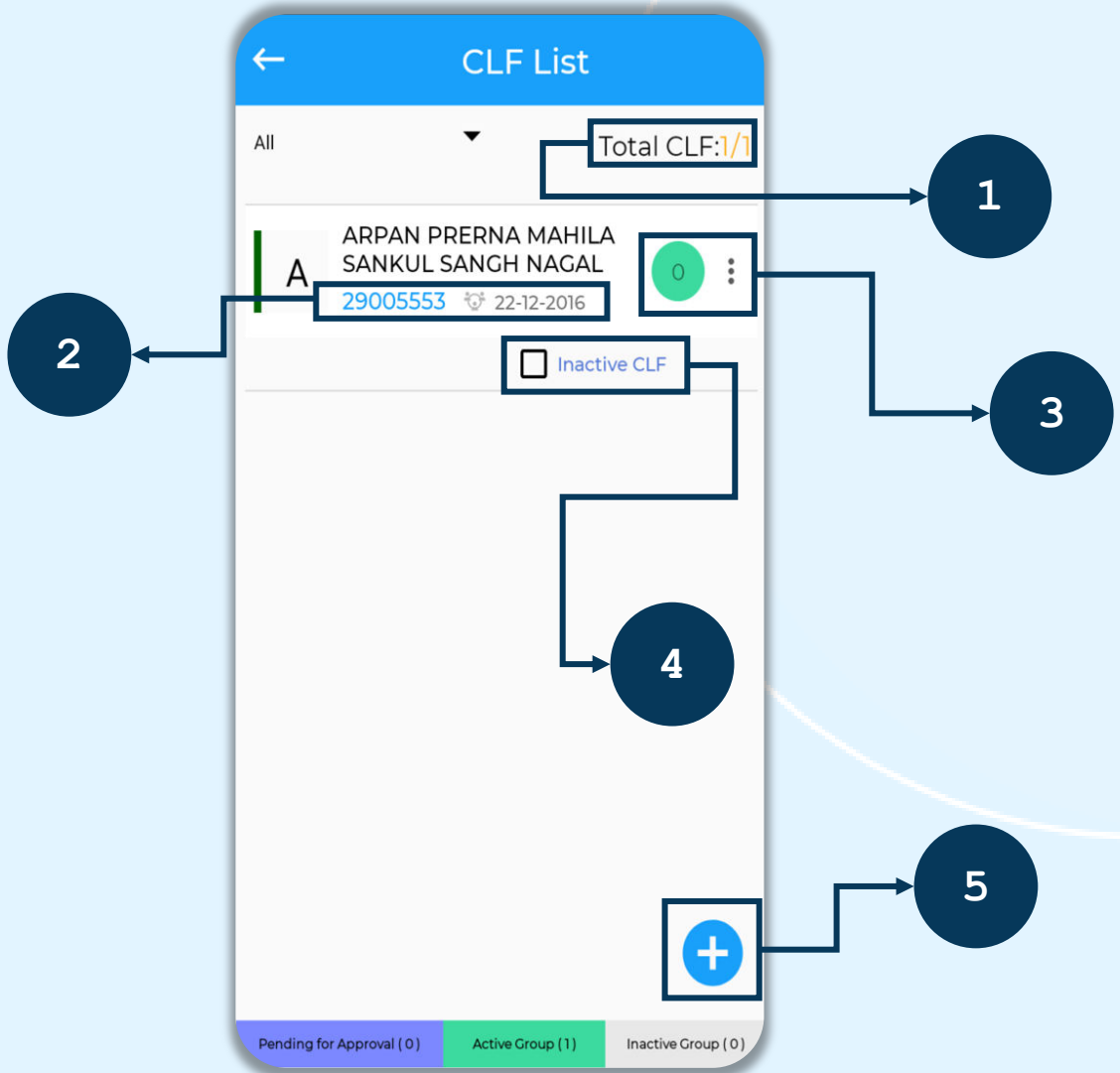
1	Shows the number of the active CLFs out of the total CLFs
2	The CLF LokOS Code and the CLF Formation Date
3	The number denotes the total number of mapped CLFs. The data about mapped CLFs can be downloaded from the 3-dot button
4	To mark a CLF Inactive
5	Add a new CLF by clicking on the '+' button
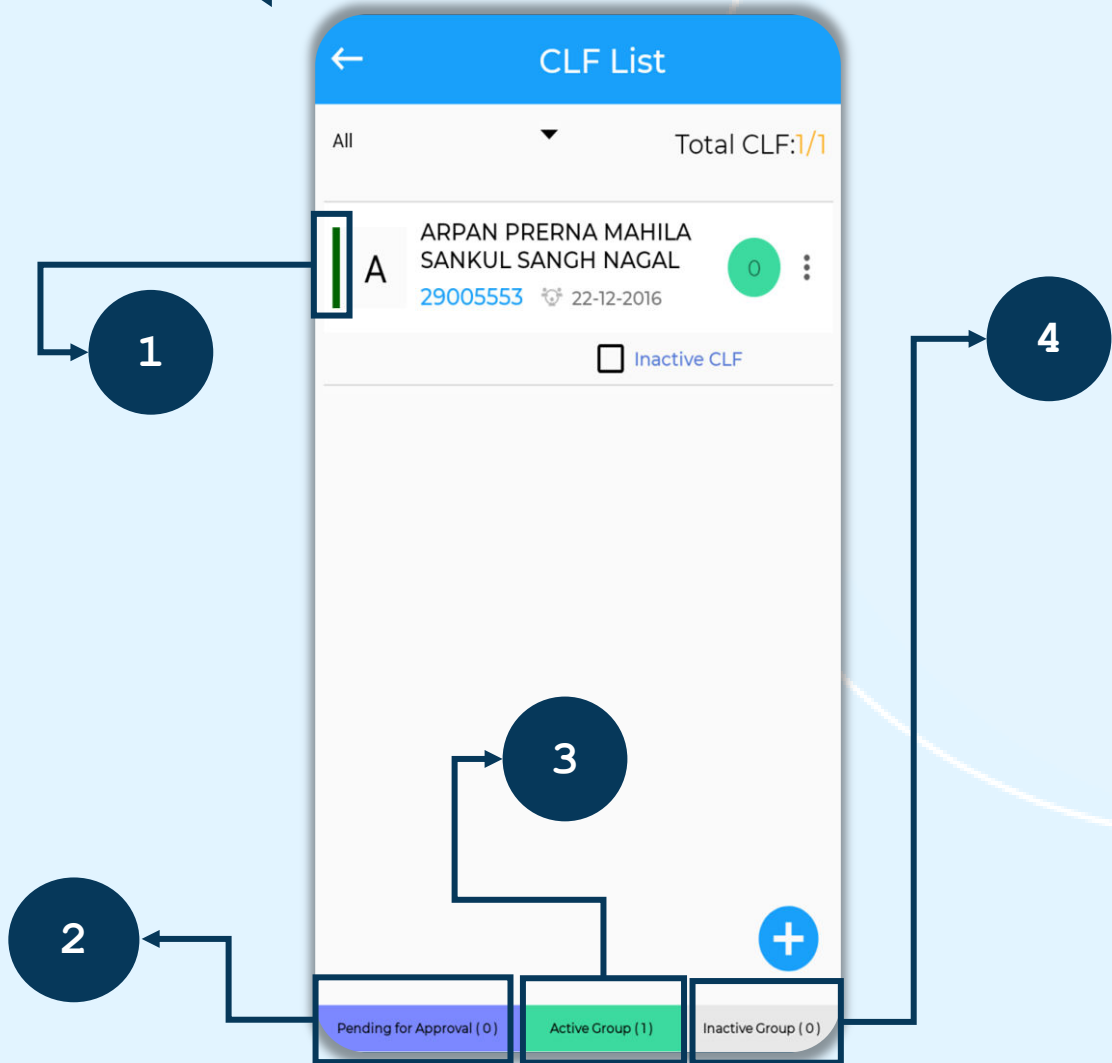
1	Left Vertical column – Data Updation identifier
2	The number of new CLFs pending for the BPM's spproval
3	The number of active CLFs
4	The number of inactive CLFs

Note:

➤ The Left Vertical column - Data Updation identifier will change from 'Green' to 'Orange' after the completion of the CLF profile

CLF List

All ▼   Total CLF: 1/1

A   ARPAN PRERNA MAHILA SANKUL SANGH NAGAL
29005553   22-12-2016   0   ⋮

☐ Inactive CLF

1   2   3   4   5

CLF Profile

Summary

Review and Upload Data

Download mapped VO

Delete CLF

Pending for Approval (0)   Active Group (1)   Inactive Group (0)
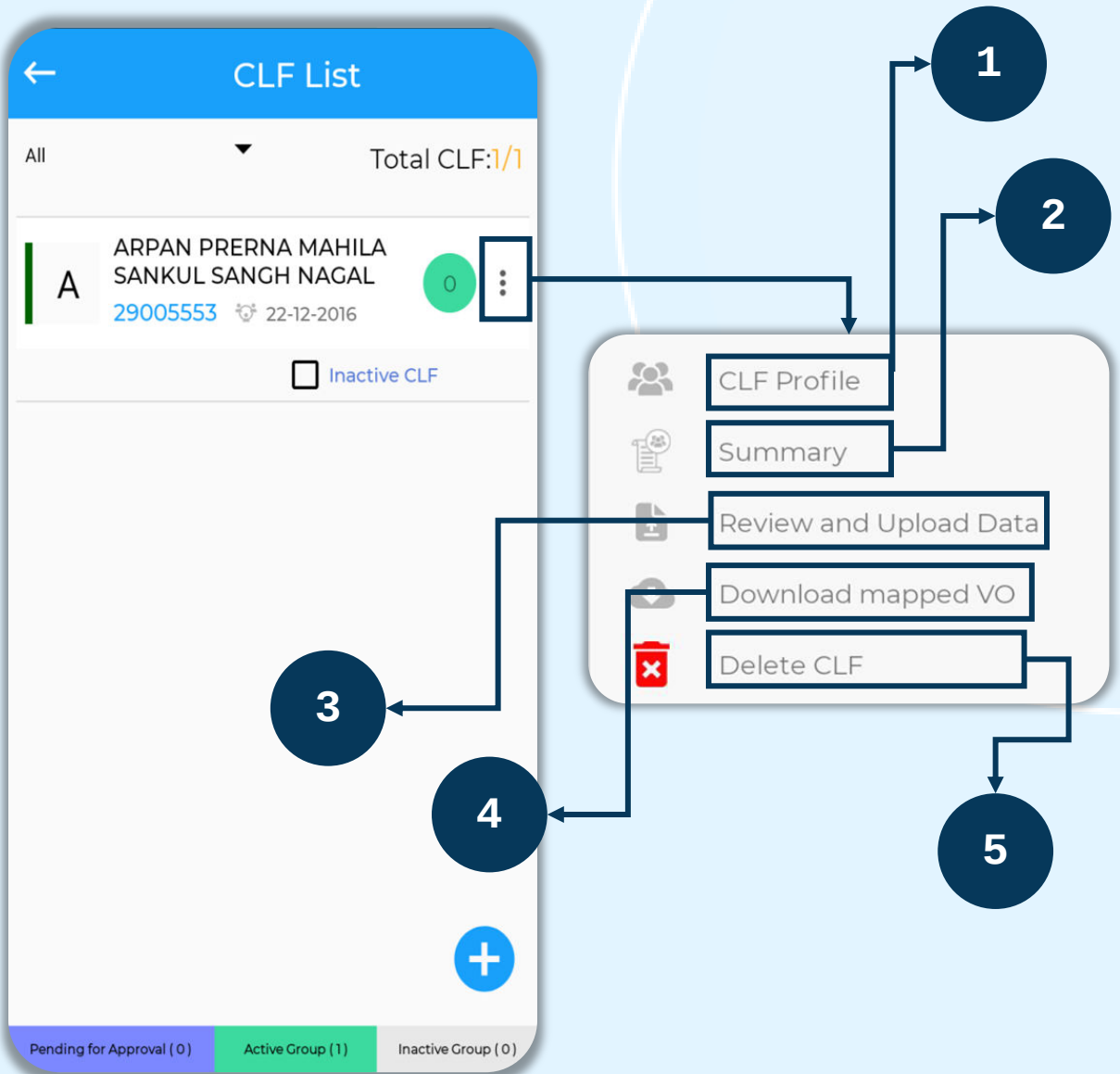
1	Users can open the CLF profile details
2	Users can view the CLF Summary
3	Users can check the status for uploading CLF
4	Users can download the mapped CLF data from the server
5	Users can delete CLF , if created by mistake and is not synced with the server

CLF List

All ▼   Total CLF:1/1

| A | ARPAN PRERNA MAHILA SANKUL SANGH NAGAL 29005553 ⏱ 22-12-2016 | 22 | ⋮ |

☐ Inactive CLF

Pending for Approval (0)   Active Group (1)   Inactive Group (0)

Basic Details

Block*
NAJIBABAD ▼

CLF Name*
ARPAN PRERNA MAHILA SANKUL SANGH NAGAL

CLF Name in Local Language
Type Here...

Formation Date*
22-12-2016   📅

1 Asterisk '*' marked field is mandatory to fill

Note:

➤ Bookkeeper must complete all the details
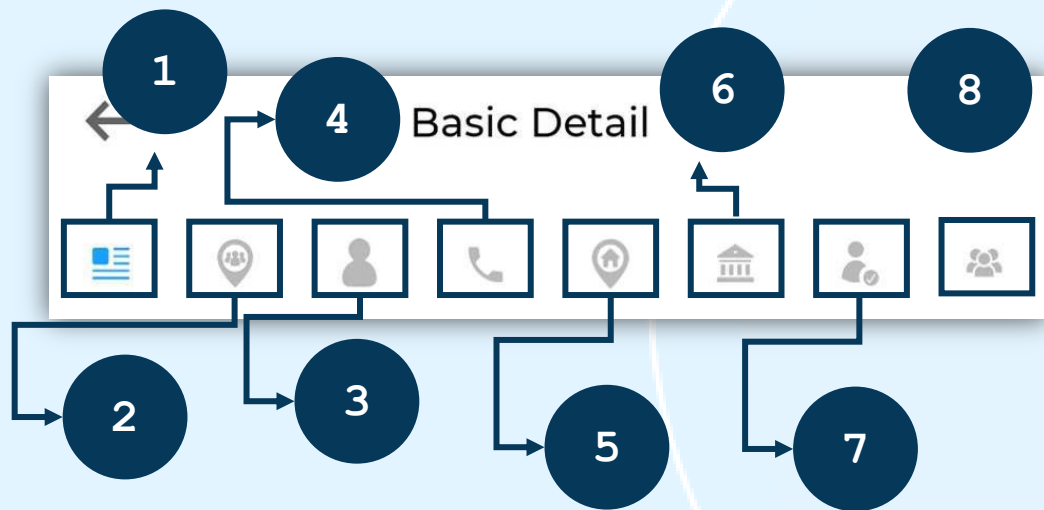
1	CLF Basic Detail
2	VO – CLF Mapping
3	Executive Committee Member
4	View CLF Office Bearers' Mobile Numbers
5	CLF Address
6	CLF Bank details
7	CLF KYC Details
8	CLF Sub Committee

Note:

➢ Icon colour will change to green if data has been entered in the section

1	Block are auto selected based on the Geography of the CLF
2	The user can modify the CLF name
3	Type the CLF name in local language
4	Click to modify the formation date
5	Select promoted by – NRLM/State Project

Basic Details

1

Promoted By*

NRLM

3

○ New   ◉ Revived

2

Revival Date*

dd-mm-yyyy

1	Select Promoted By – 'NRLM'
2	Option 'New' to be selected if the CLF is created under the NRLM
3	Option 'Revived' is to be selected if the CLF is revived by the NRLM

Note:

➢ If revived is selected, then selection of the revival date is mandatory

Basic Details

Promoted By*

State Project ▼

Promoter Name*

Select ▼

○ Co-opted   ◉ Revived   ○ Non-co-opted

Revival Date*

dd-mm-yyyy 📅

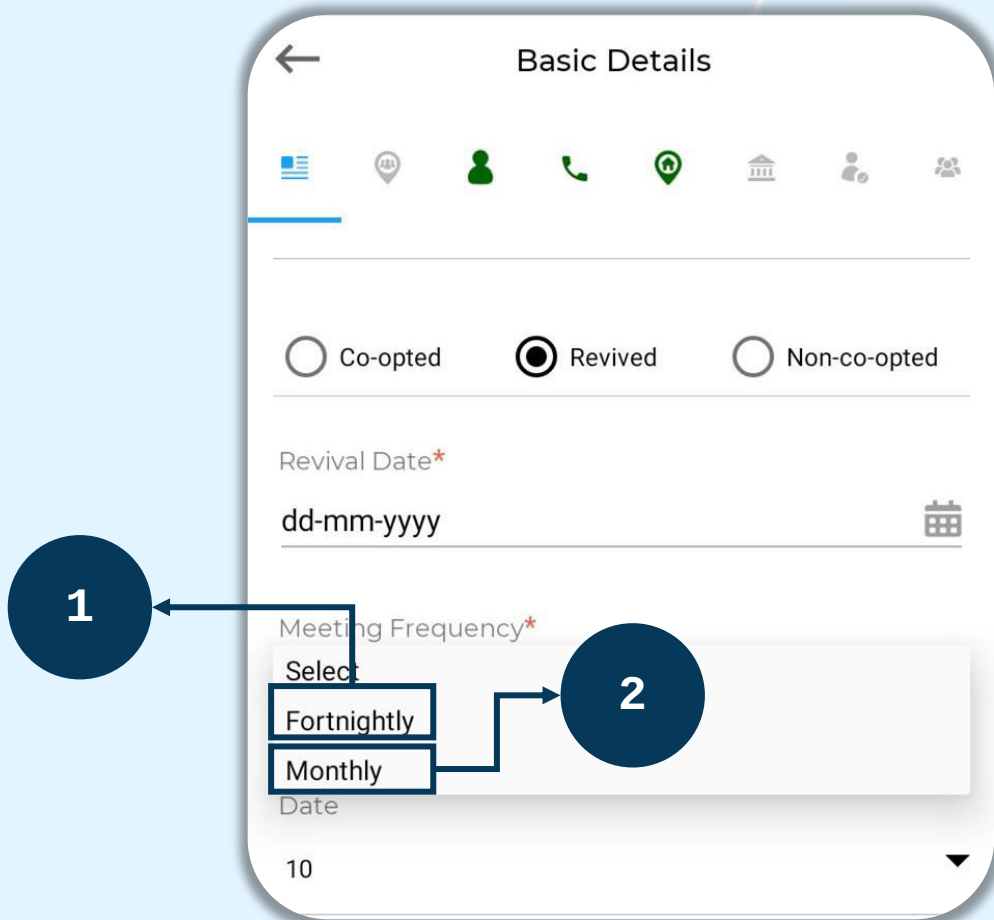|	
1	State Project Name selected form the drop-down
2	Option 'Co-opted' is to be selected if the CLF is Co-opted by the NRLM
3	Option 'Revived' is to be selected if the CLF is revived by the NRLM
4	Option 'Non-Co-opted' is to be selected if the CLF is only promoted by State Project and is not in the NRLM fold

Note:

➤ After the selection of the promoters name, if co-opted/revived is selected, then the date of co-option/revival is mandatory

Basic Details

○ Co-opted   ◉ Revived   ○ Non-co-opted

Revival Date*

dd-mm-yyyy 🗓

1

Meeting Frequency*

Select
Fortnightly
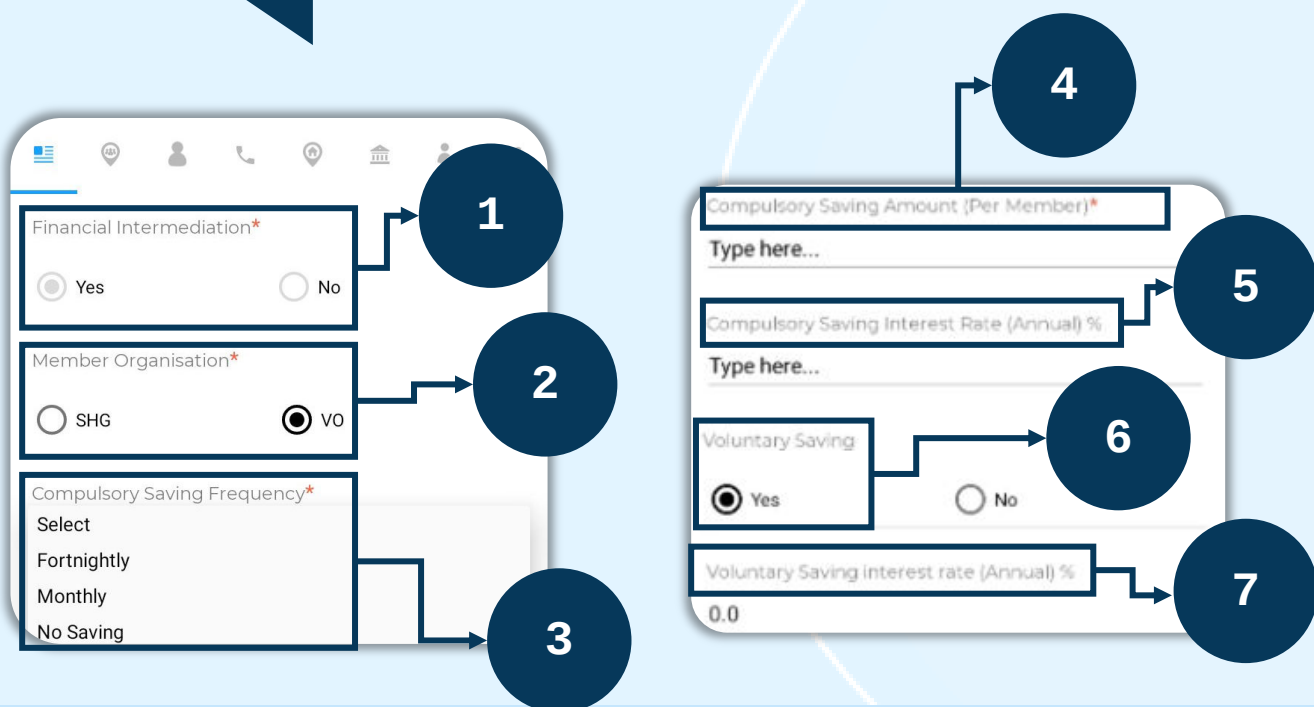Monthly

2

Date

10 ▼

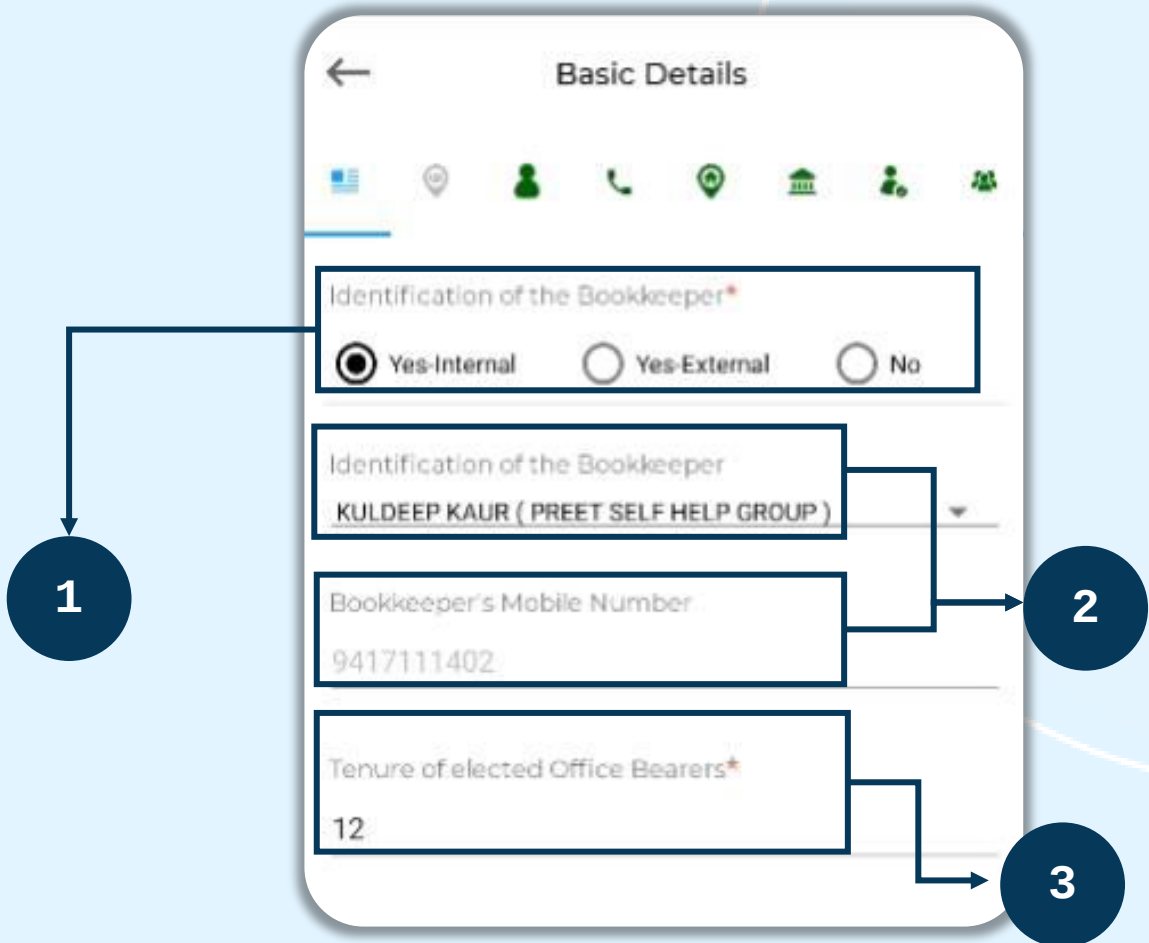| **1**	When 'Fortnightly' is selected then the user will have to select 2 dates for two meetings in a month
2	When monthly is selected the user will have to choose any meeting day in first, second, third, fourth or the last week, or the user can choose a date

1	CLF is a 'Financial Intermediary' so 'Yes' is by default selected and frozen
2	Select Member Organization – SHG/VO
3	Select 'Compulsory Savings Frequency' – 'Fortnightly' or 'Monthly'. If no savings are collected in the CLF, then select 'No Saving'
4	Enter Compulsory Saving Amount
5	Enter interest rate on Compulsory savings if applicable
6	Select 'Yes' If voluntary savings are collected
7	Enter interest rate on voluntary savings if applicable

Note:

➤ Since Financial Intermediation is selected as Yes, then bank details are mandatory

➤ Fortnightly Meeting- The savings frequency can be Fortnightly or monthly

➤ Monthly Meeting - Savings Frequency can be Monthly only

Basic Details

Identification of the Bookkeeper*

(•) Yes-Internal   ( ) Yes-External   ( ) No

1

Identification of the Bookkeeper

KULDEEP KAUR (PREET SELF HELP GROUP)

2

Bookkeeper's Mobile Number

9417111402

Tenure of elected Office Bearers*

12

3

---

1 | Identification of the bookkeeper
❖ If selected ' Yes - Internal' then the Bookkeeper's name is to be selected from the drop-down

❖ If selected 'Yes - External' then the Bookkeeper's name and mobile number are to be entered

❖ If the Bookkeeper is not identified then select 'No'
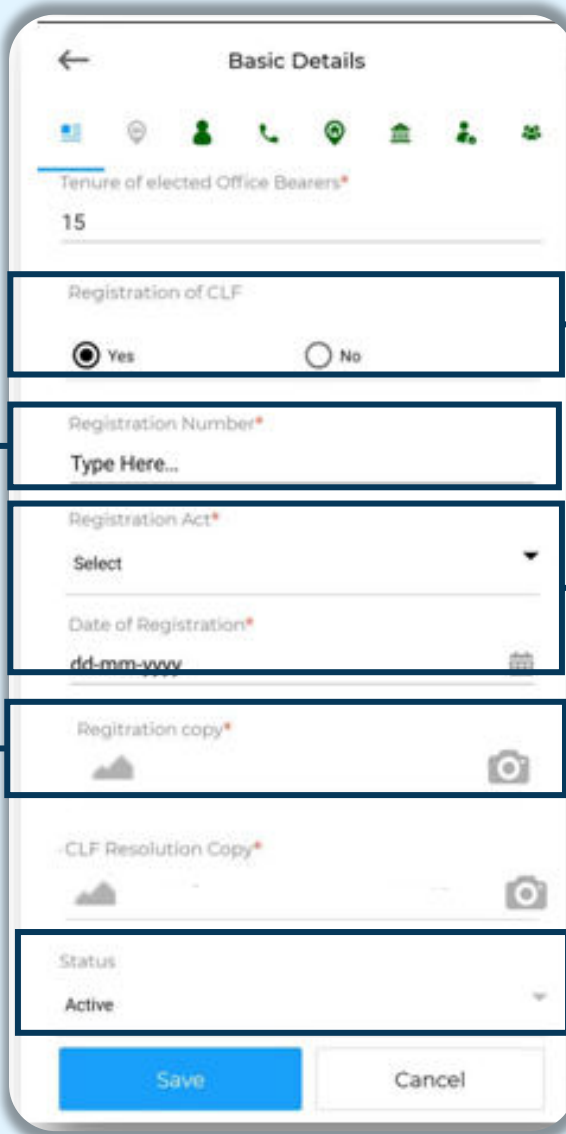
2 | Bookkeeper Name and Mobile number is mandatory

3 | Enter Election tenure of office bearers. This value can be any value between 12 to 60 months

Note:

➢ If no Bookkeeper is Identified, nothing will be entered

Entry of CLF Basic profile

Basic Details

Tenure of elected Office Bearers*
15

1 Registration of CLF
◉ Yes   ○ No

2 Registration Number*
Type Here...

3 Registration Act*
Select ▼

Date of Registration*
dd-mm-yyyy 📅

Registration Act*
Select
State Cooperative Societies Act
Multi-State Cooperative Societies Act
Mutually Aided Cooperative Societies Act
Societies Registration Act
Public Trust Act
Producer Company Under Companies Act

4 Regitration copy*
📷

CLF Resolution Copy*
📷

5 Status
Active ▼

Save   Cancel

1	Select Registration of CLF (Yes or No)
2	If Yes, then enter the Registration Number
3	Select the Registration Act from the drop-down and select the Date of Registration
4	Registration Copy- Click on the camera icon and capture an image
5	Status is Active by default, although a CLF can be marked inactive from the checkbox on the CLF listing

VO resolution copy

Capture Image   Upload PDF

← Basic Details

Registration of CLF

◉ Yes   ○ No

Registration Number*

1234567890

Registration Act*

State Cooperative Societies Act

Date of Registration*

05-11-2016

CLF Resolution Copy*

(PDF) Image is available on the server 📷

Status

Active

1

Save   Cancel

← ↻ ⊟ CROP

1   CLF Resolution Copy- Click on the camera icon and choose any, either capture an image, or upload a PDF

Note:

➢ If the Resolution Copy is already in the server it will display a massage 'Image is available on the server'

➢ If there is a single page of Resolution Copy, then capture the image and if there are multiple pages, then attach a PDF file

➢ The image can be rotated, flipped and cropped as per the requirements

➢ If the Resolution Copy is a PDF, then it can be selected from the mobile storage

CLF List

All ▾   Total CLF:1/1

A   ARPAN PRERNA MAHILA SANKUL SANGH NAGAL   29005553   22-12-2016   22 ⋮

☐ Inactive CLF

Pending for Approval (0)   Active Group (1)   Inactive Group (0)

Leaving Reason*
Select ▾

Inactive Date*
dd-mm-yyyy 🗓

Save and Upload   Cancel

Leaving Reason*
Select
Duplicate VO profile entry in MIS
VO not functional after receiving funds from NRLM
VO not found in village
VO dissolved by members & account closed
VO members migrated from village
No meeting and transactions in last 6 months
VO moved to urban area
VO moved to other CLF

1	To mark a CLF Inactive, click on Inactive CLF check box
2	Select 'Leaving Reason' from the given drop down
3	Select the 'Inactive Date' from the calendar

Note:

➢ Internet connection is required to mark a CLF inactive

➢ First unmapped all the mapped VOs to mark a CLF inactive