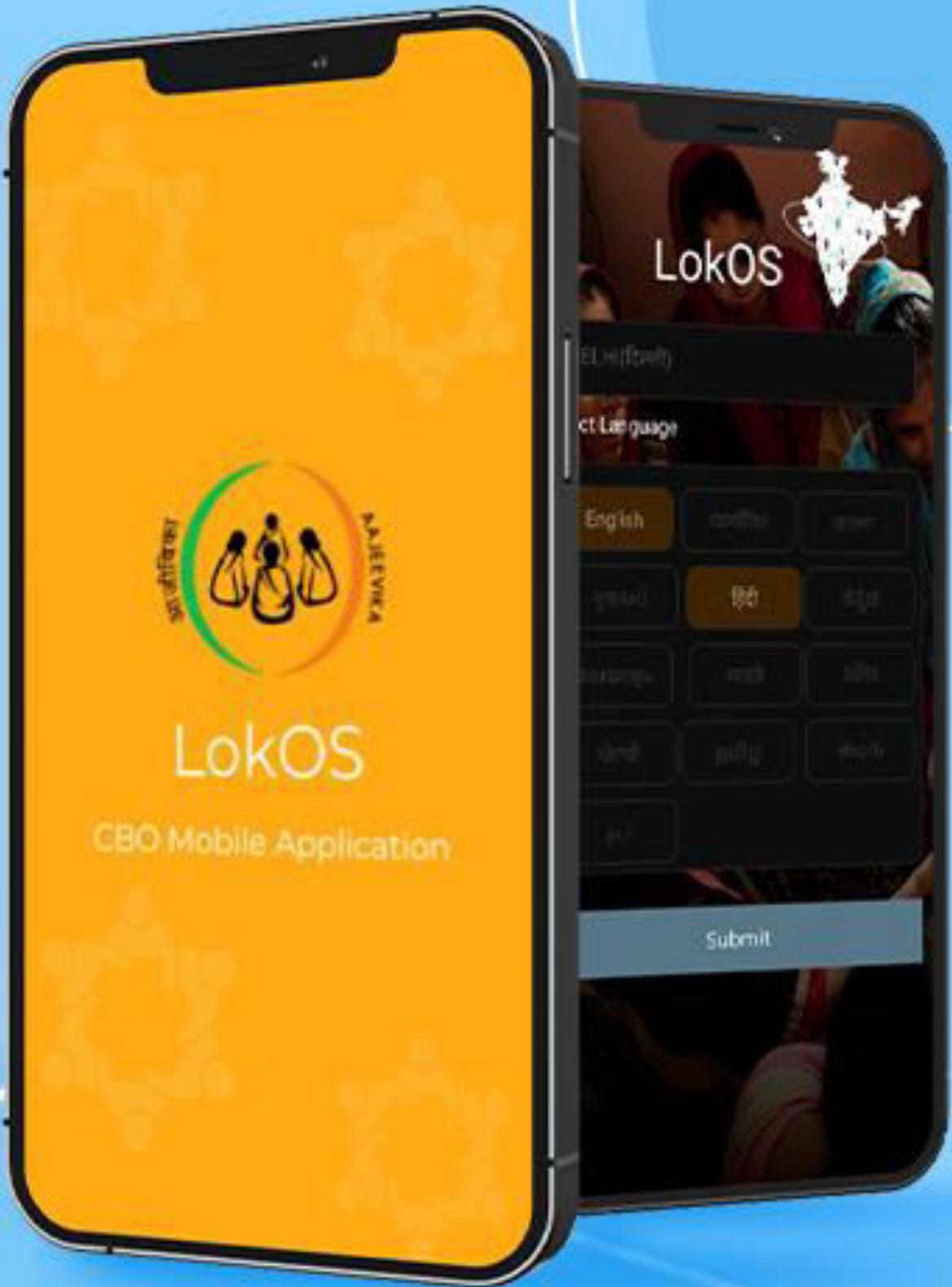




# CLF Profile Completion

## User manual Module 3



# LokOS Mobile Application



# CLF Profile Completion

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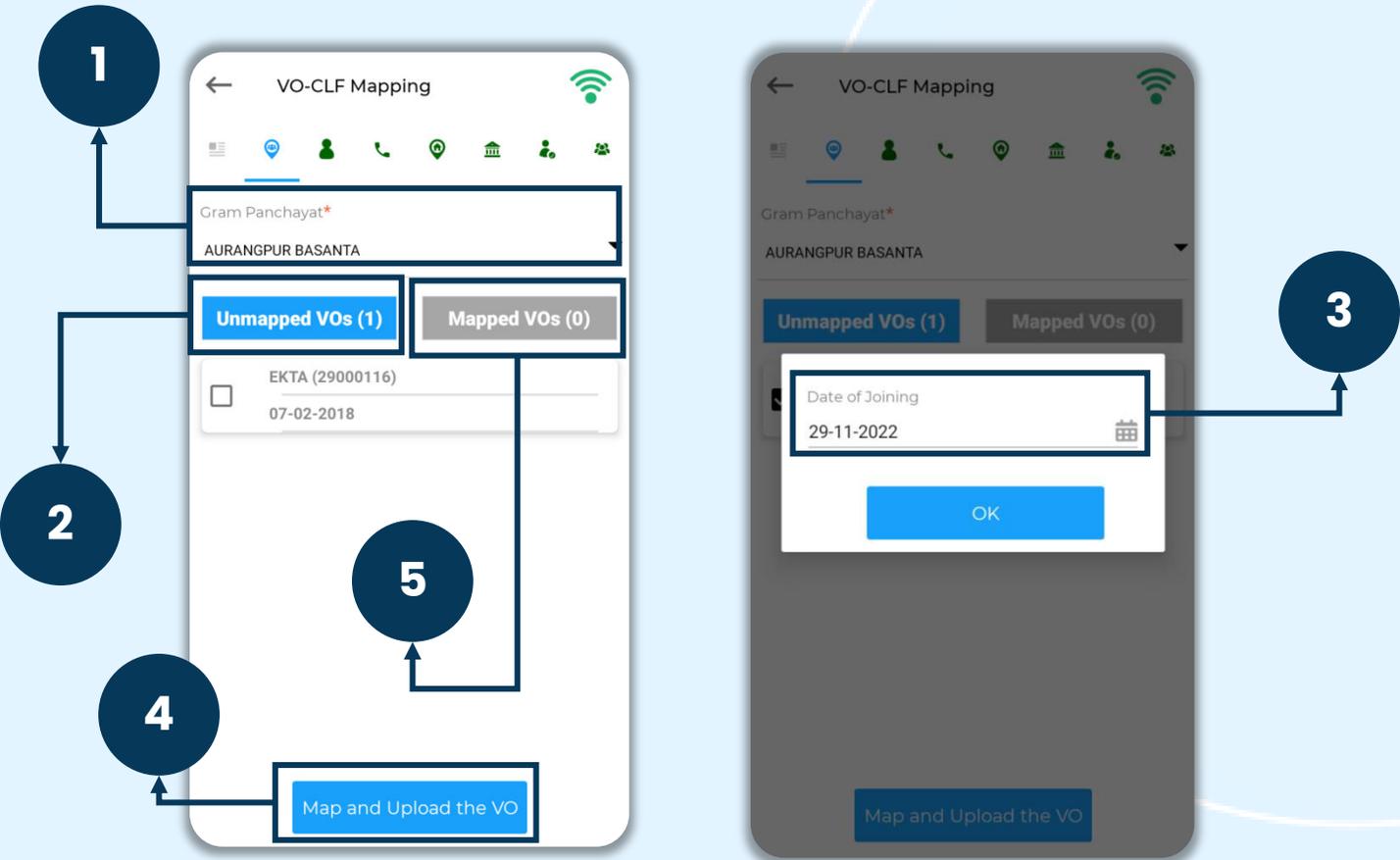
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# 01 VO-CLF Mapping



1

Select the Gram Panchayat from the drop-down from which the VO is to be mapped

2

Select the unmapped VO'S for mapping

3

Joining date is required when the VO is selected

4

Click on "Map and Upload VO" button to map the VOs

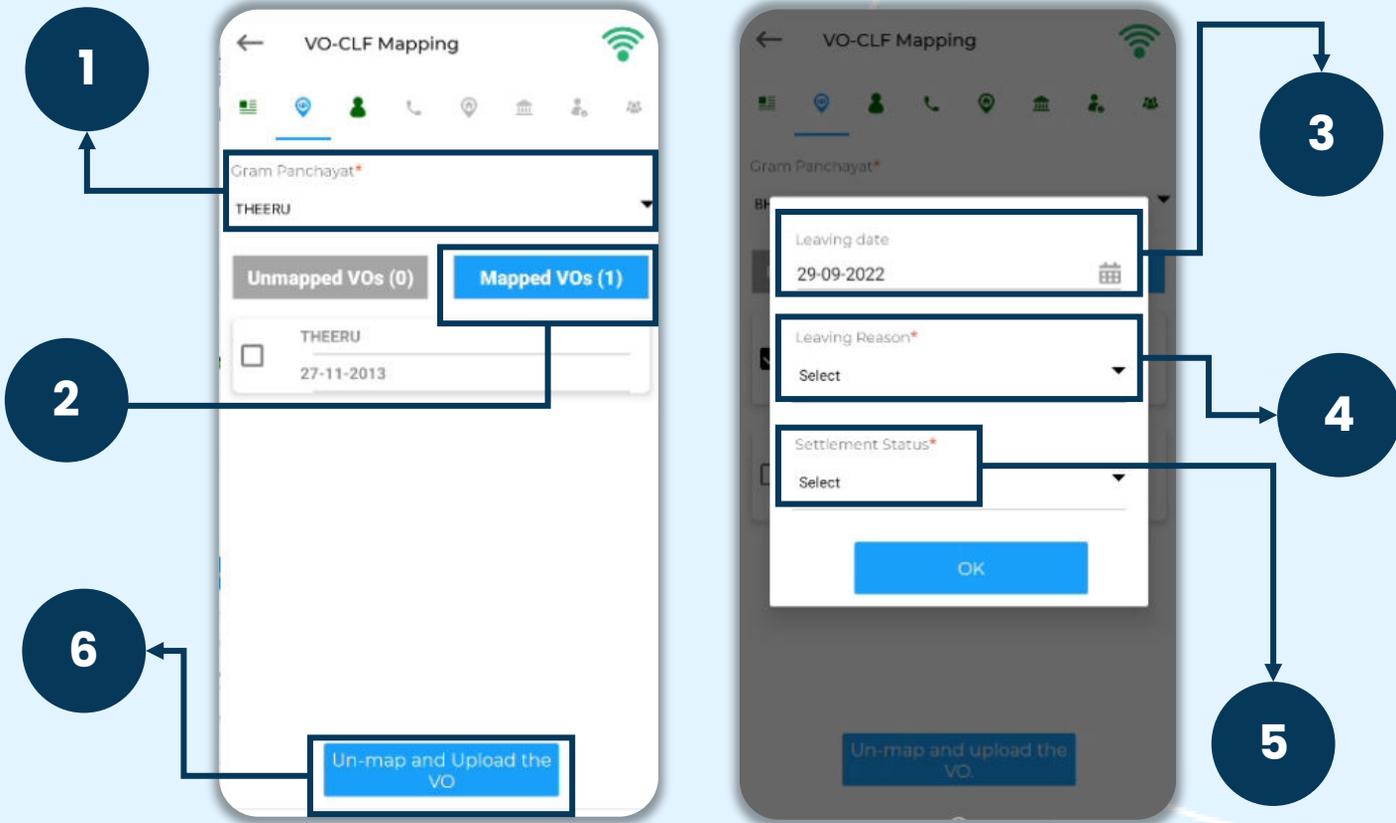
5

Users can also check the mapped VOs by clicking on the "Mapped VOs" option

## Note:

- Multiple VO's can be Mapped
- Minimum 5 VO required for CLF Upload and Activation
- Wi-Fi icon means Internet connection is a must to perform the task

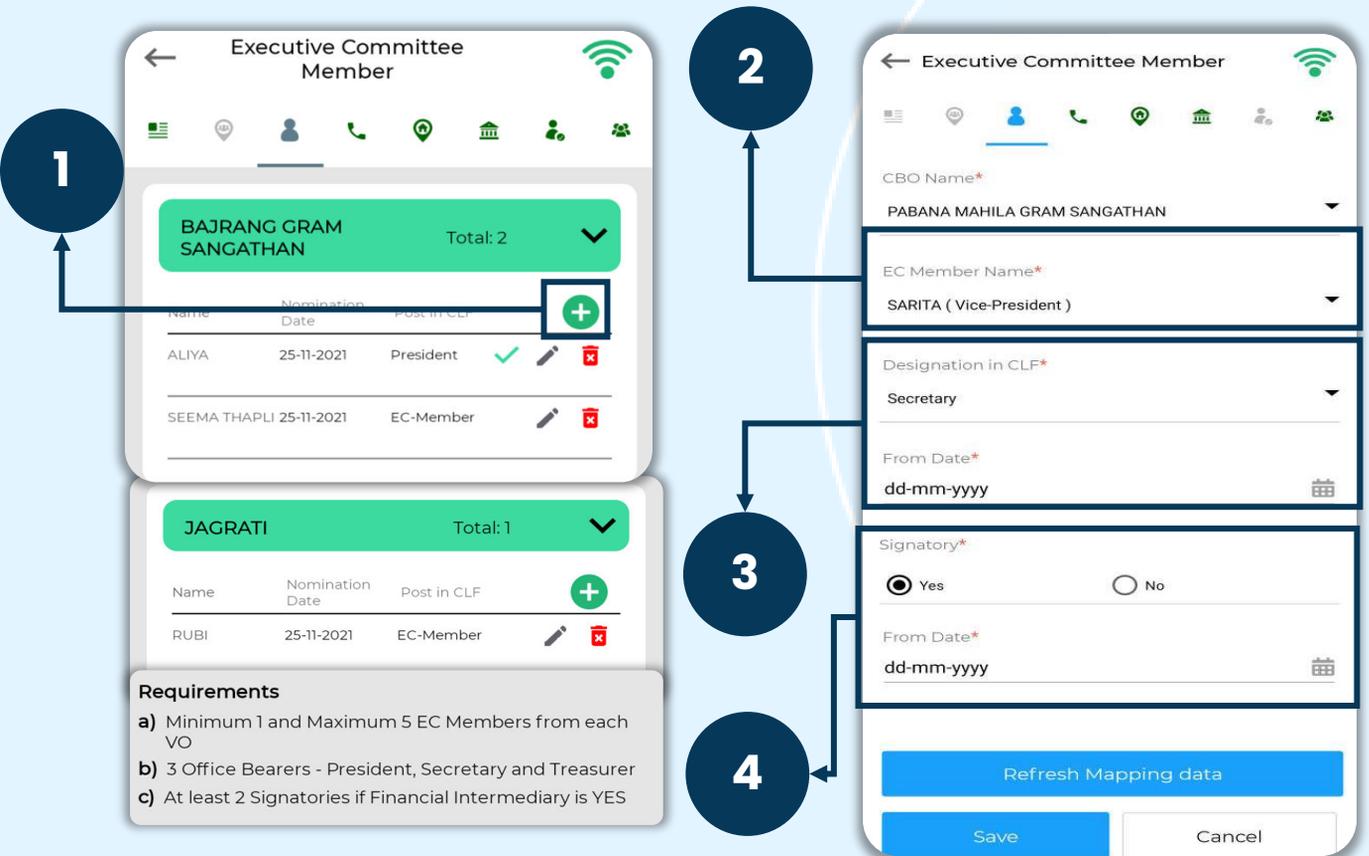
## 02 VO-CLF Unmapping



- 1 Select the Gram Panchayat from the drop-down from which the VO is to be unmapped
- 2 Select 'Mapped VOs' for Unmapping
- 3 Leaving date is required when the VO is selected for Unmapping
- 4 Select the reason for Inactive Status from the drop-down
- 5 Select the Settlement Status from the drop-down. If the settlement status is 'Pending', then no member of this VO will be required in the EC member screen
- 6 Click on 'Map and Upload the VO'

### Note:

- Multiple VO's can be unmapped
- A VO can't be unmapped if any member of that VO is an EC member or a part of any sub committee



**1** Click on ( + ) button to add EC members in the CLF

**2** Select the EC members from the drop-down, maximum 5 Members are allowed from each mapped VO

**3** Select designation in the CLF from the drop-down. Select 'From Date'

**4** For Signatory, select Yes or No (If yes, select the date from which the Office Bearer became a signatory)

## Note:

- Linked VO card appears automatically
- First complete the office bearers and signatory then the other EC member
- If the office bearers are changed in the CLF, the CLF resolution copy needs to be updated in the CLF basic details
- 3 Office Bearers (President, Secretary and Treasurer) and 2 signatories are required if the CLF is a financial intermediary
- Wi-Fi icon means Internet connection is a must to perform the task
- Delete only in case of wrong entry, otherwise mark as inactive
- Only one designation is allowed per member

← Phone Details

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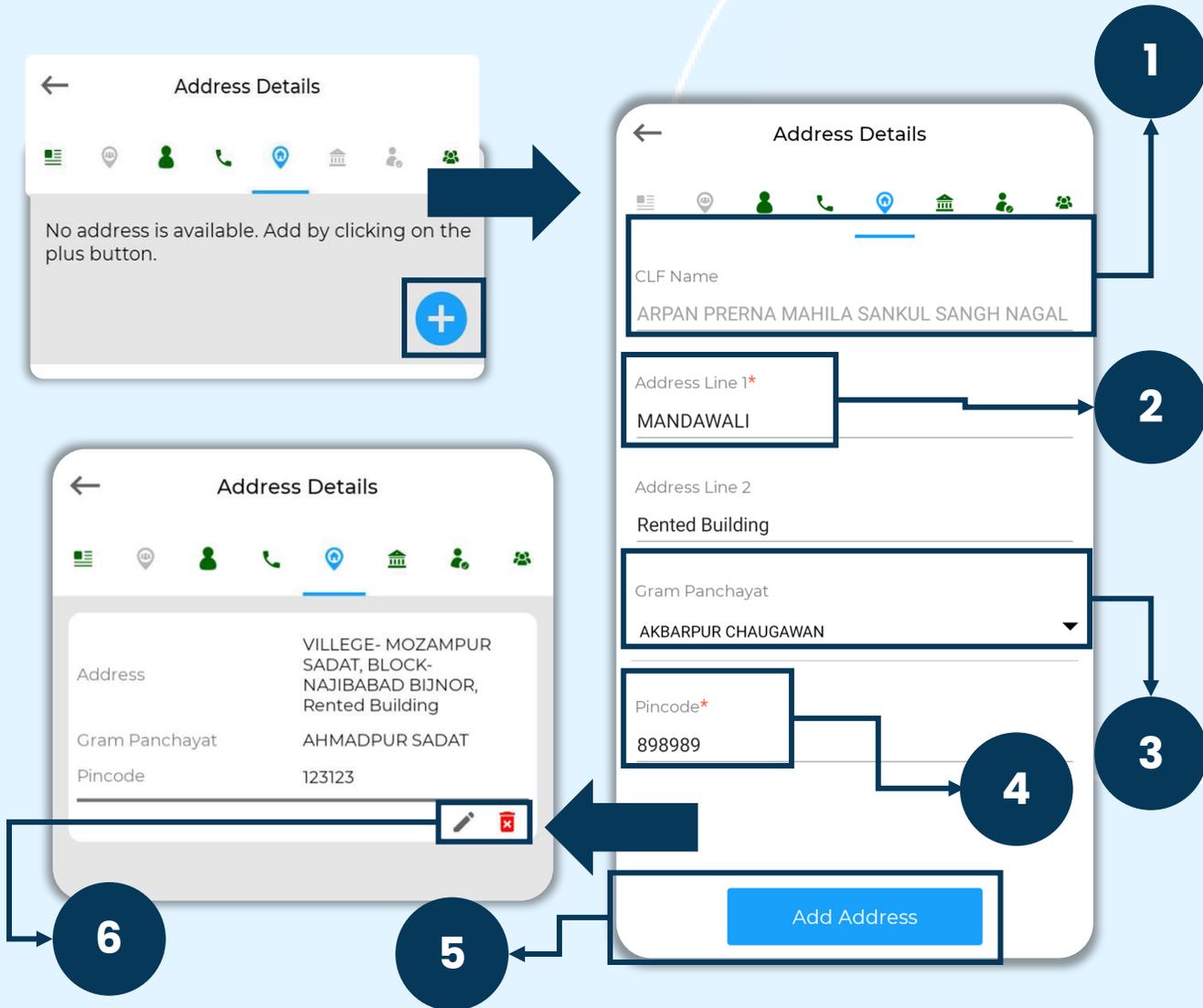
Name (Designation)	KIRAN DEVI (President)
Mobile number	7500539472 9012708527

Name (Designation)	TARA DEVI (Treasurer)
Mobile number	9627403465

### Note:

- ❑ The office bearer's mobile numbers will be considered the mobile numbers for the CLF
- ❑ Office bearer's name, designation and the mobile number will display automatically
- ❑ The updation of the mobile number can only be done in the member's profile

# 05 Entry of CLF Address Details



**1** CBO Name: Auto-populated

**2** First line of address is mandatory

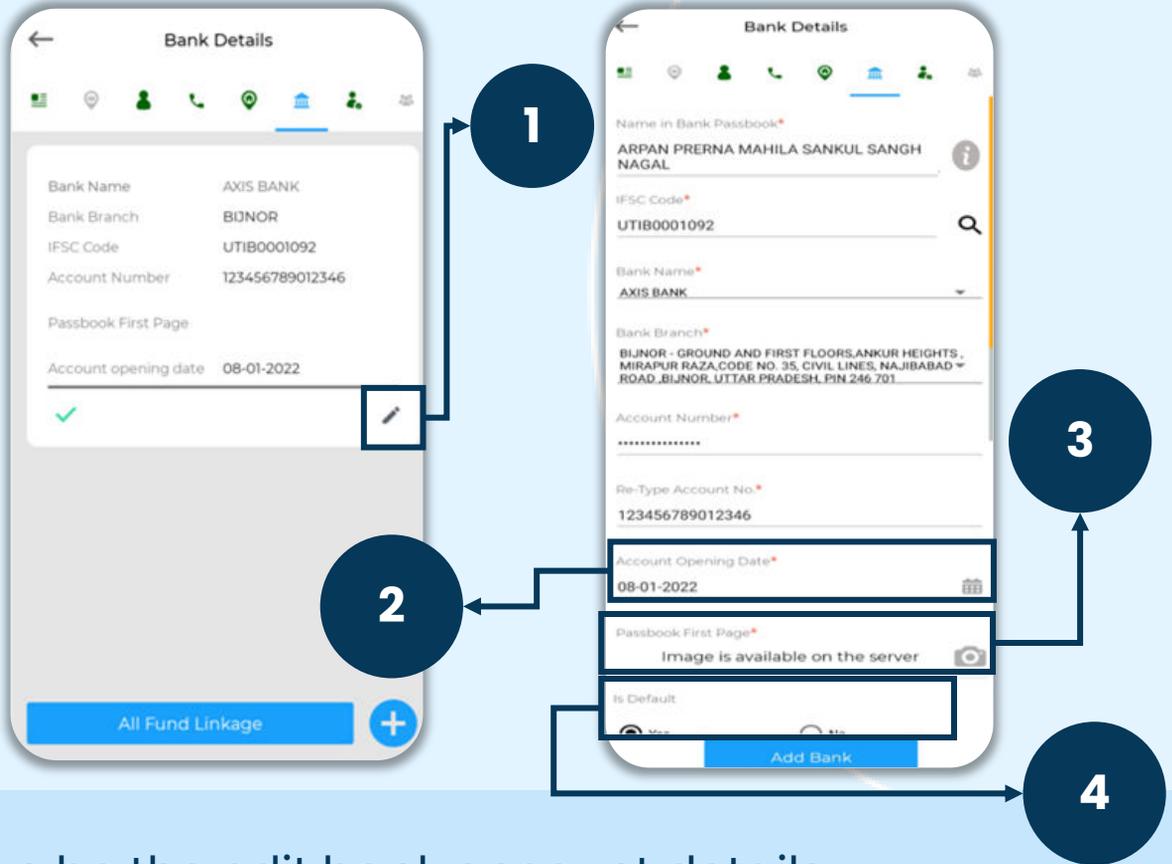
**3** Select the Gram Panchayat from the drop-down

**4** Enter the area pin code

**5** Click on 'Add Address' to save the address details

**6** The user can edit and delete the existing or new address of the CLF

## 06 Entry of CLF Bank Detail Screen



**1** BK can be the edit bank account details

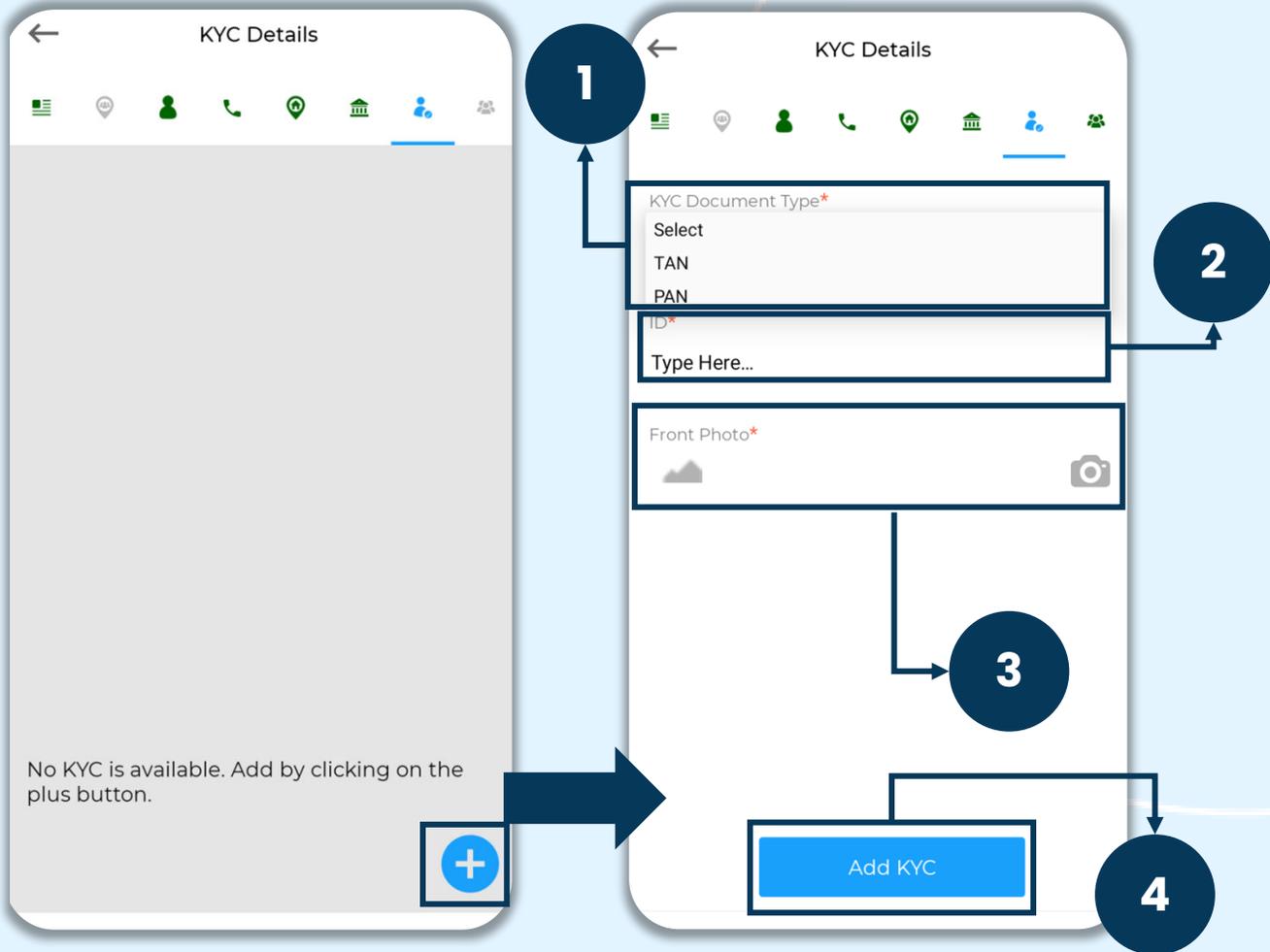
**2** Account Opening Date – the user can modify the account opening date

**3** Passbook image – the user can capture the passbook image But it cannot be captured after the approval from BPM

**4** Status – The user can mark the bank account as inactive

### Note:

- If the migrated bank is not PFMS verified, then all the fields are editable
- If the migrated bank is PFMS verified, then users will not be allowed to make any changes except for the following fields
- If the bank account in migrated data is not verified but funds are received in that account, the user can't modify any details of that account. But the user is allowed to mark it as inactive if anything is wrong with the account details



- 1 Select KYC documents from the drop down
- 2 Enter ID as per the selection
- 3 Upload photo of the TAN/PAN document for verification
- 4 Click to add KYC

## Note:

- Both TAN and PAN details can be entered by the user in KYC

## 08 Entry of CLF Sub Committee

**1** Federation Name is auto-populated

**2** Select 'Sub Committee' from the drop-down list

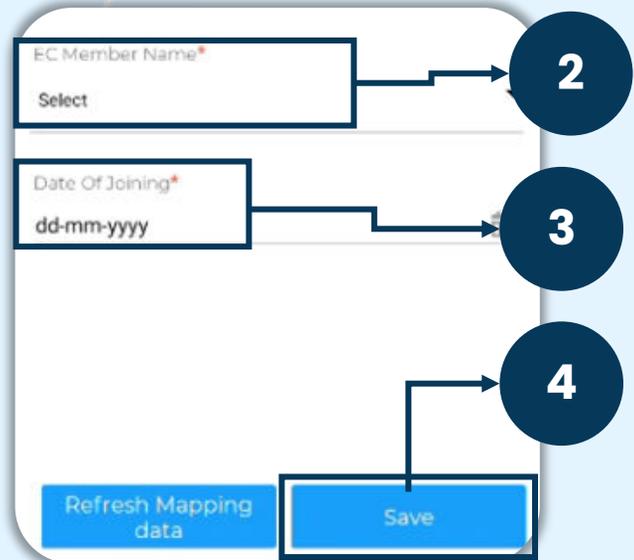
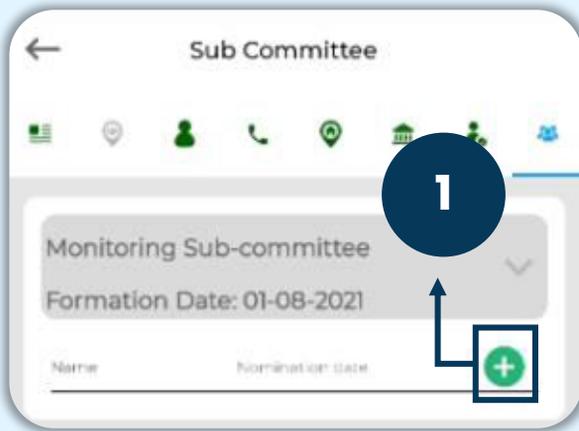
**3** Select the date from which the sub committee is formed in 'From Date'

### Note:

- Multiple Sub Committees can be created by clicking on the plus button
- Internet connection is required for this screen
- Sub-committee cannot be deleted, it can be inactivated by clicking on the name of the sub-committee



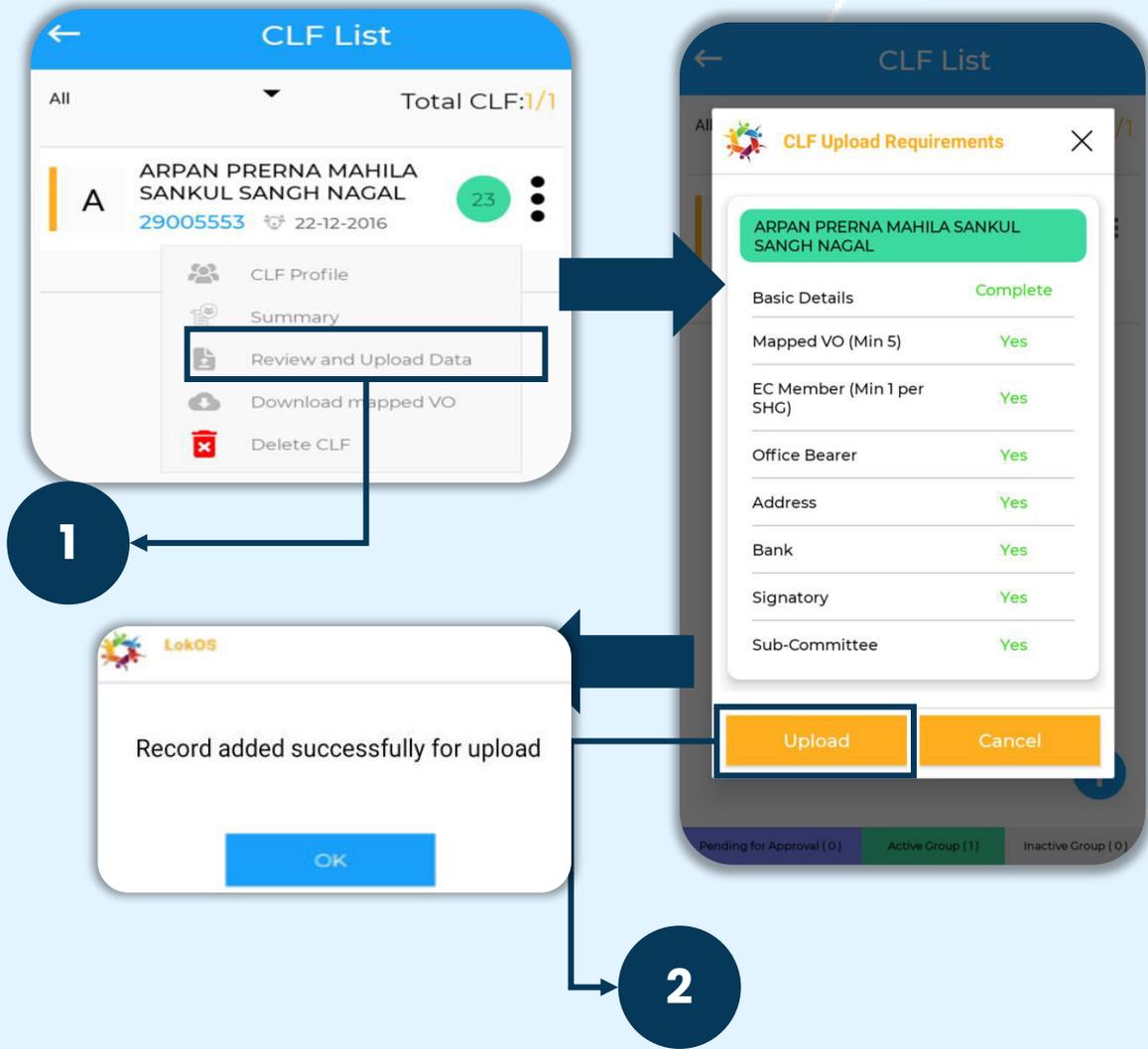
## Add members in CLF Sub Committee



- 1 To add a member click on (  ) button
- 2 Select 'EC Member' from the drop-down
- 3 Select 'Date of Joining'
- 4 Click on 'Save' to save the details

### Note:

- If subcommittee has at least 2 members then card should be green else gray
- Minimum 2 members are required in a Subcommittee to upload
- One member can join only one Sub Committee But the same member can join a separate Special Sub committee
- Internet connection is required for this screen



1

Select 'Review and Upload' option after clicking on the 3 dots (  ) against the CLF name

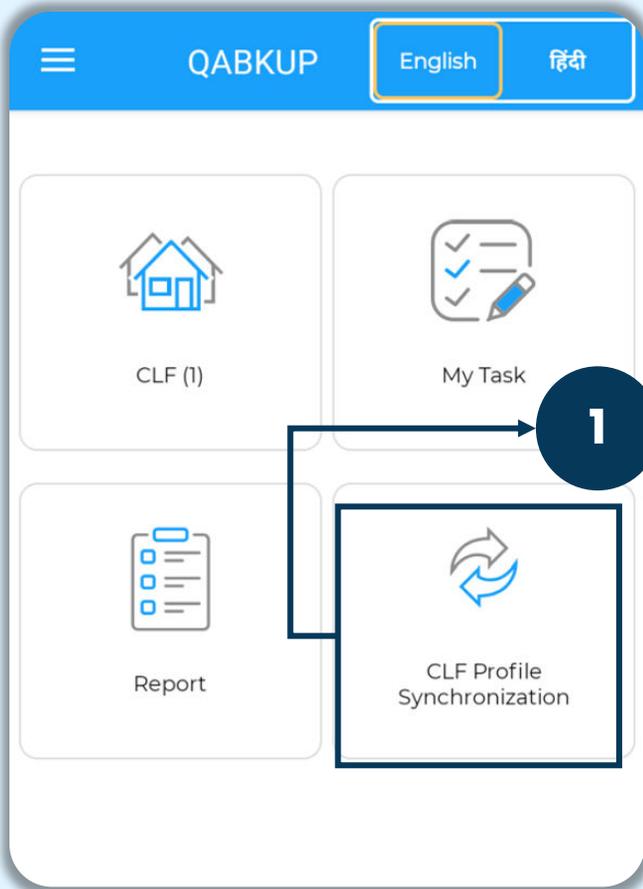
2

When the record is ready to upload, click on 'Upload'. After successful upload a pop-up showing 'Record Added To Queue' will appear

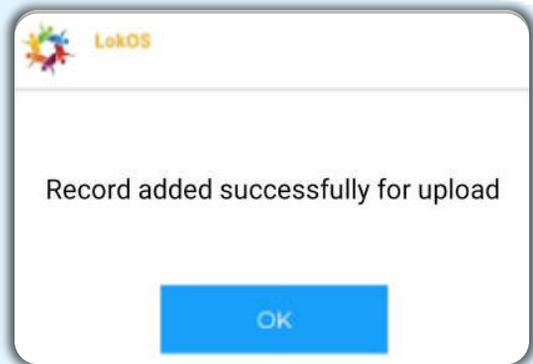
## Note:

- User has to check if the CLF upload requirements have been completed or not. If not complete, then the upload button is disabled
- Internet connection is mandatory to upload the record
- When CLF records are updated and ready to upload, then the CLF left vertical bar color changes from 'Blue' to 'Orange'
- If financial intermediary is selected as 'Yes' in Basic Details, then the Bank Details and the 2 signatories are mandatory

# Synchronization Type 2



To upload the data:  
a) Minimum 5 VO's should be Mapped  
b) 1 EC from each VO Required  
c) 3 Office Bearers - President, Secretary, Treasurer are Required  
d) Bank Account & 2 Signatories are Mandatory if Financial Intermediary is YES  
d) Address of CLF.



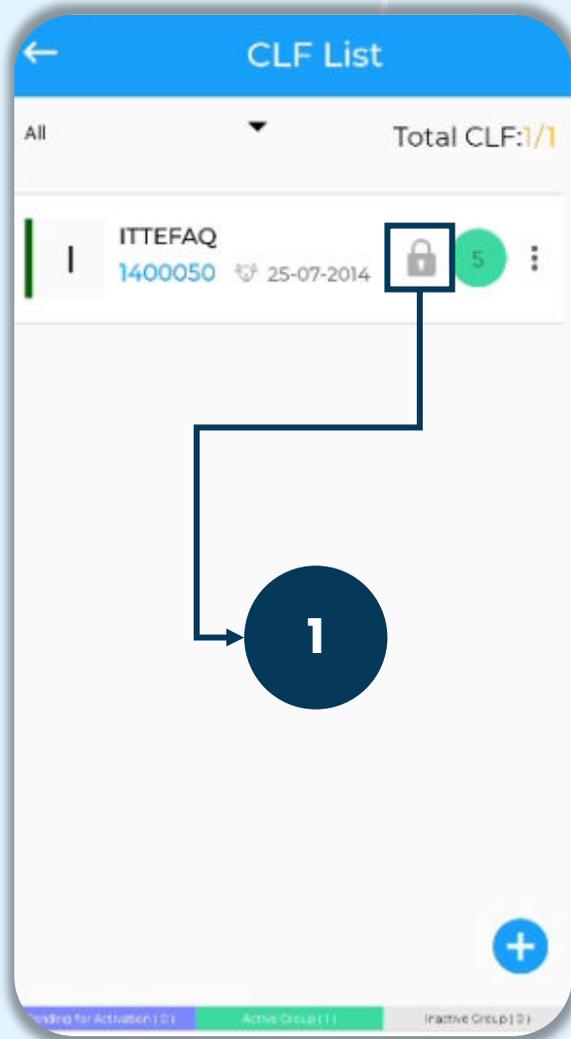
**1** Click on the CLF Profile Synchronization

**2** Click on the 'Upload' button

**3** Click on 'Upload Data CLF record need to be uploaded' then the CLF will be uploaded. If the count is not appearing, check the minimum requirements for uploading a CLF

## Note:

- The count of VOs ready for upload will be shown in the bracket ( )
- Internet connection is required for this screen



1

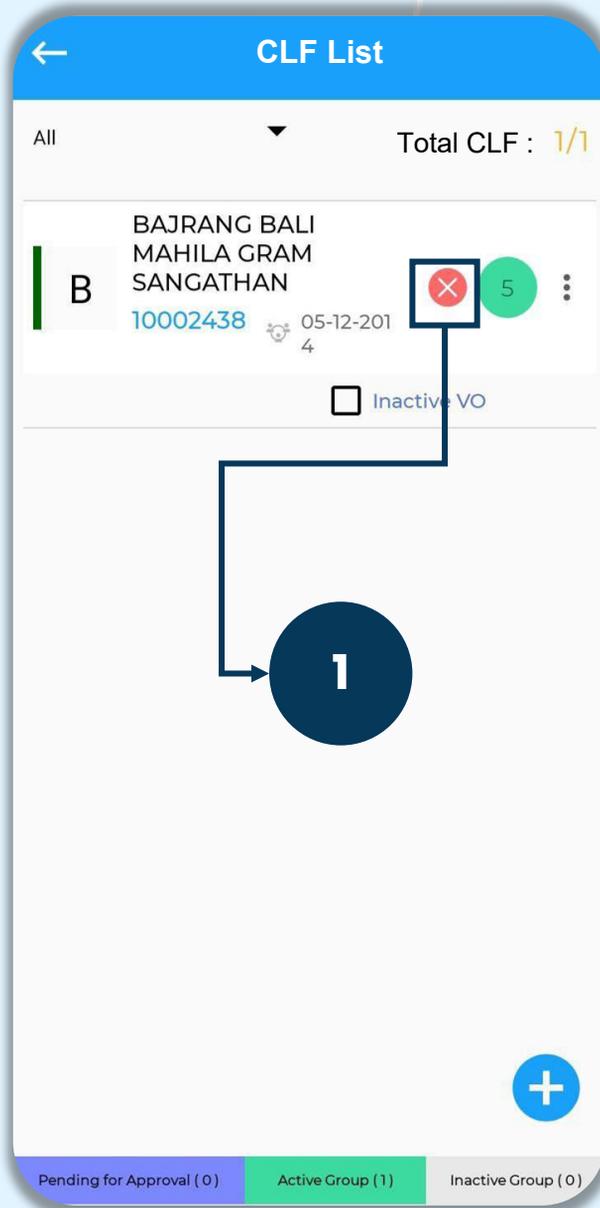
The user can check the lock icon after uploading the data, which means the CLF is uploaded successfully

### Note:

- After synchronization, all the records will appear on the Web and the BPM can check and verify the CLF



## 10 Approval and Rejection of CLF by BPM



1

The cross denotes that the CLF Profile has been rejected

### Note:

- The user has to download the approval status from the CLF profile synchronization screen
- If the lock symbol has been removed from the CLF name, it denotes that the CLF Profile has been approved
- Rejection remarks can be viewed by clicking on the cross (x) button

