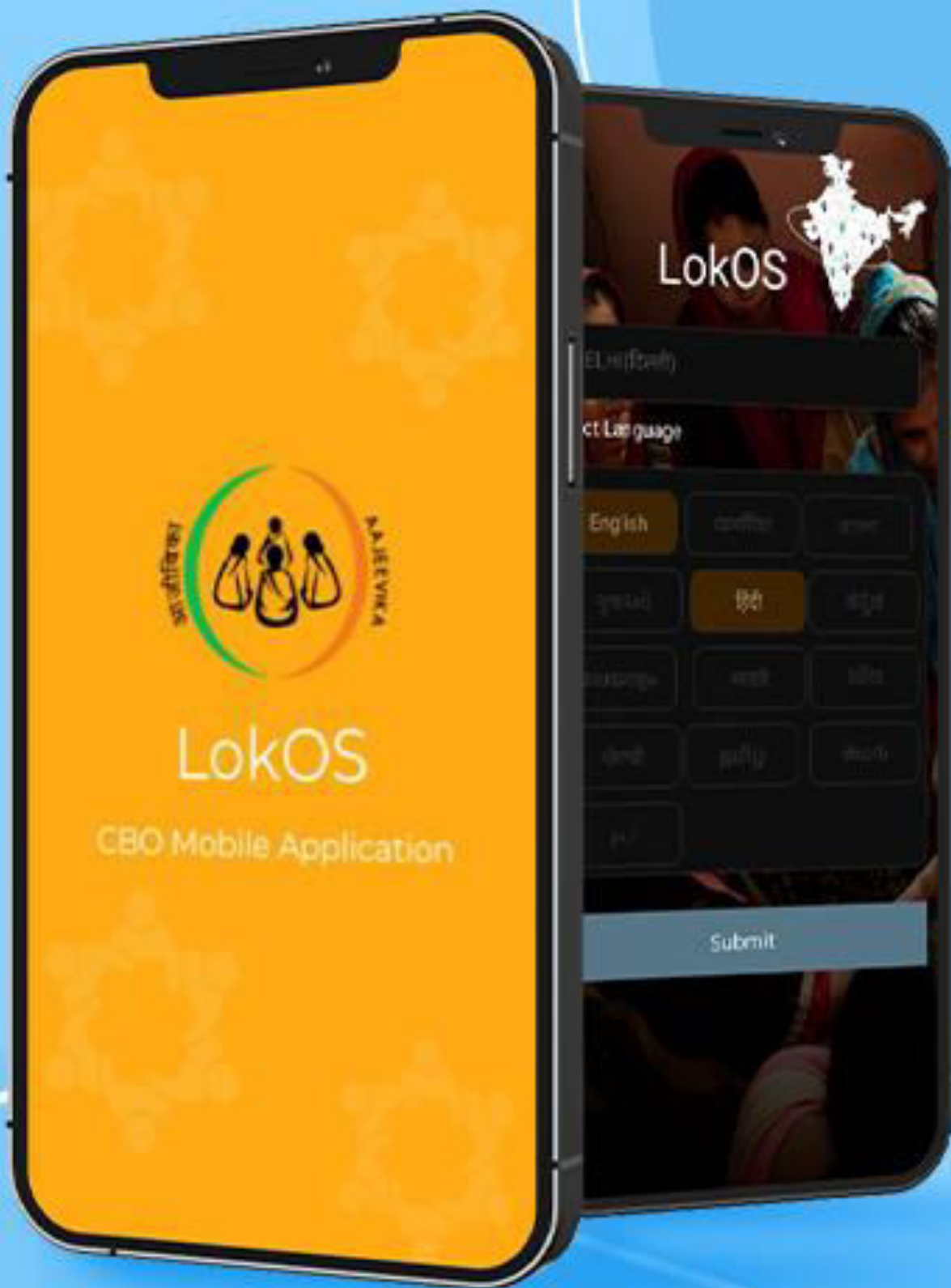




VO Profile Completion

User manual Module 3



LokOS Mobile Application



VO Profile Completion

Table of Contents

01 SHG–VO Mapping

02 SHG–VO Unmapping

03 Entry of Executive Committee Members

04 VO Phone Details Screen

05 Entry of VO Address Details

06 Entry of VO Bank Detail Screen

07 Entry of VO KYC Document

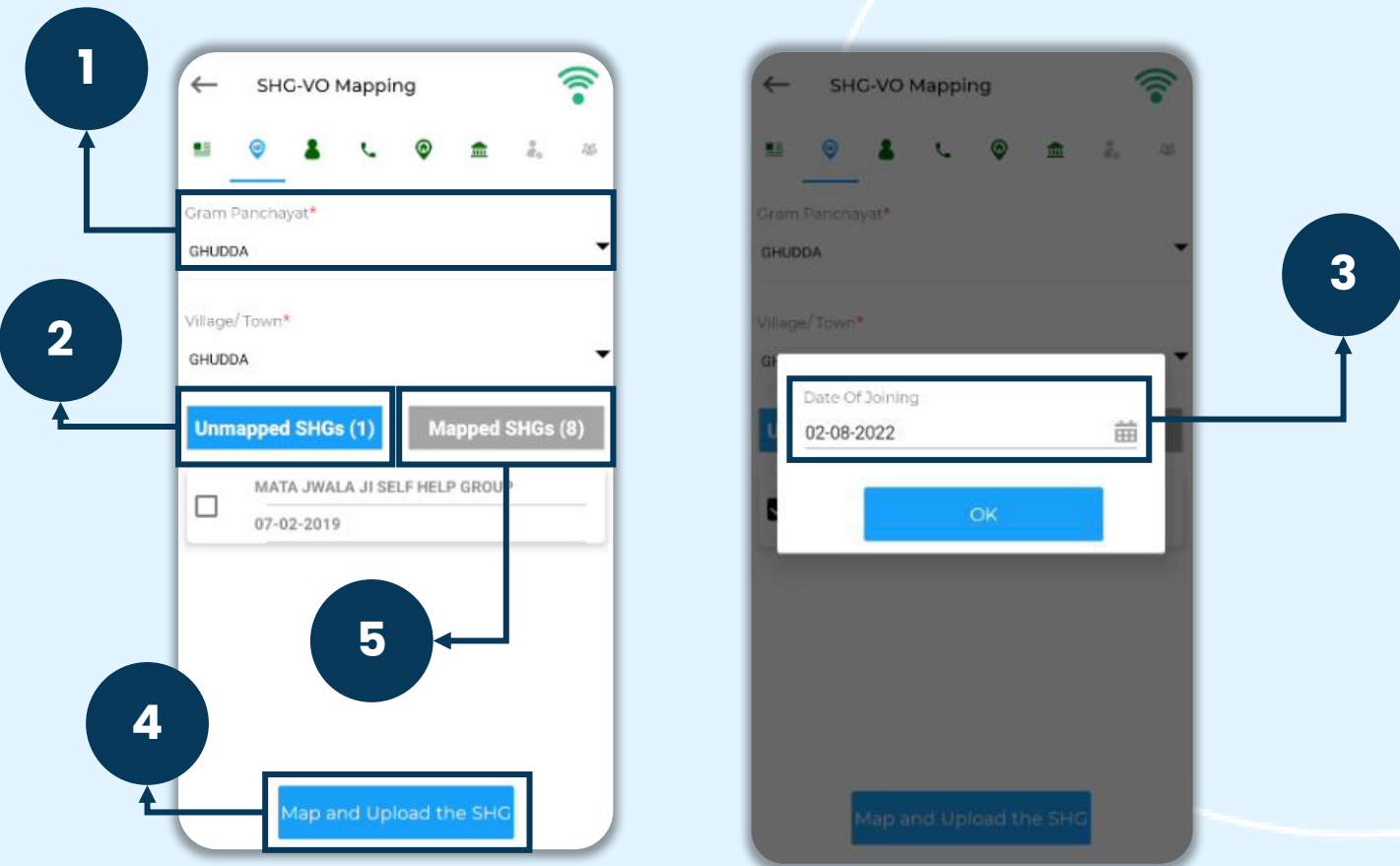
08 Entry of VO Sub Committee

09 Synchronization

10 Approval and Rejection of VO by BPM



01 SHG-VO Mapping



1

Select the Gram Panchayat and the Village from the drop-down from which the SHG is to be mapped

2

Select the unmapped SHG'S for mapping

3

A joining date required when the SHG is selected

4

Click on the "Map and Upload SHG" button to map the SHGs

5

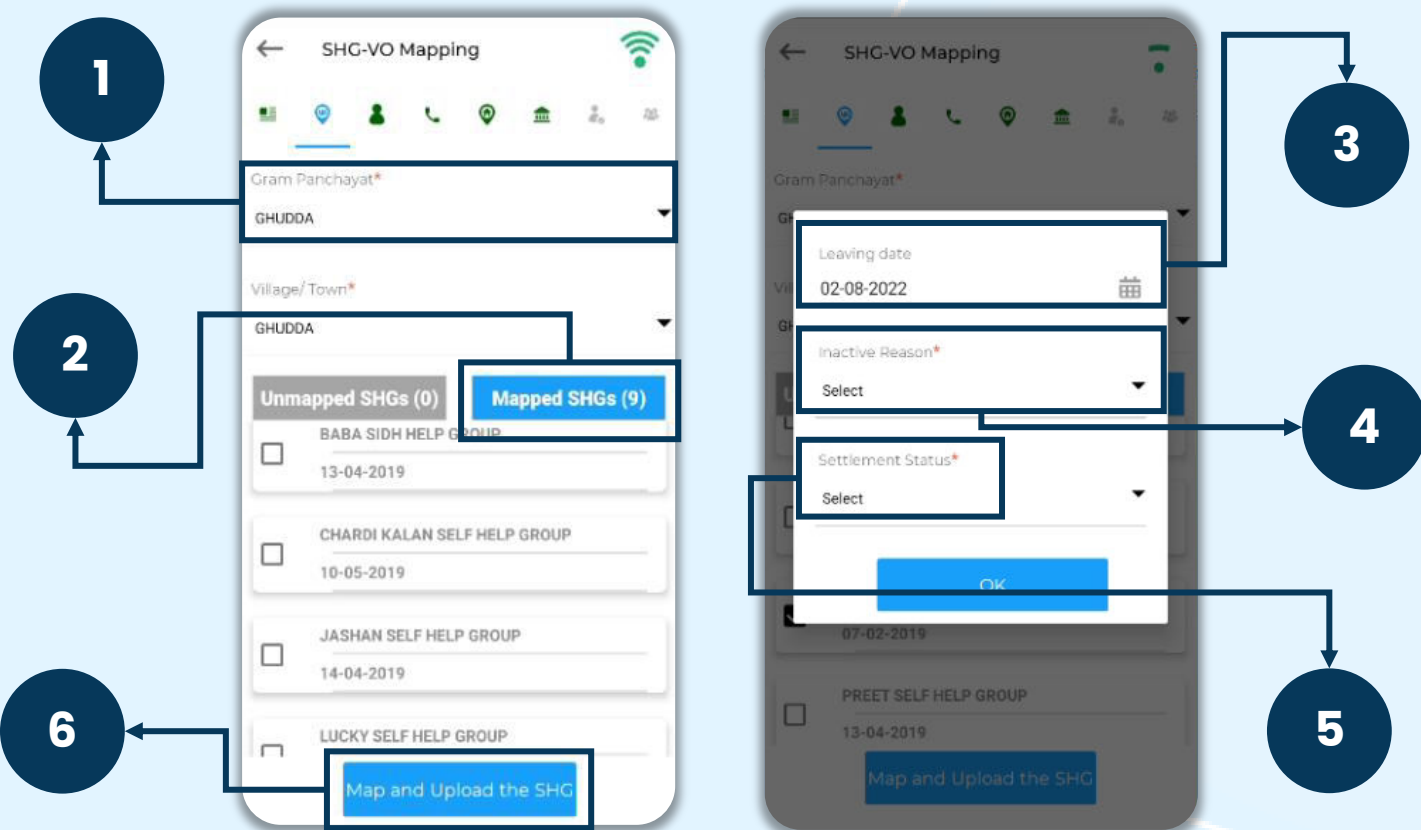
Users can also check mapped SHGs by clicking on the "Mapped SHGs" option

Note:

- ☐ Multiple SHG's can be mapped
- ☐ Minimum 5 SHGs are required for VO Upload & Activation
- ☐ Wi-Fi icon means that Internet connection is a must to perform the task



02 SHG-VO Unmapping



1

Select Gram Panchayat and Village from the drop down from which the SHG is to be unmapped

2

Select 'Mapped SHGs' for Unmapping

3

Leaving Date required when SHG is selected for Unmapping

4

Select reason for Inactive Status from the drop down

5

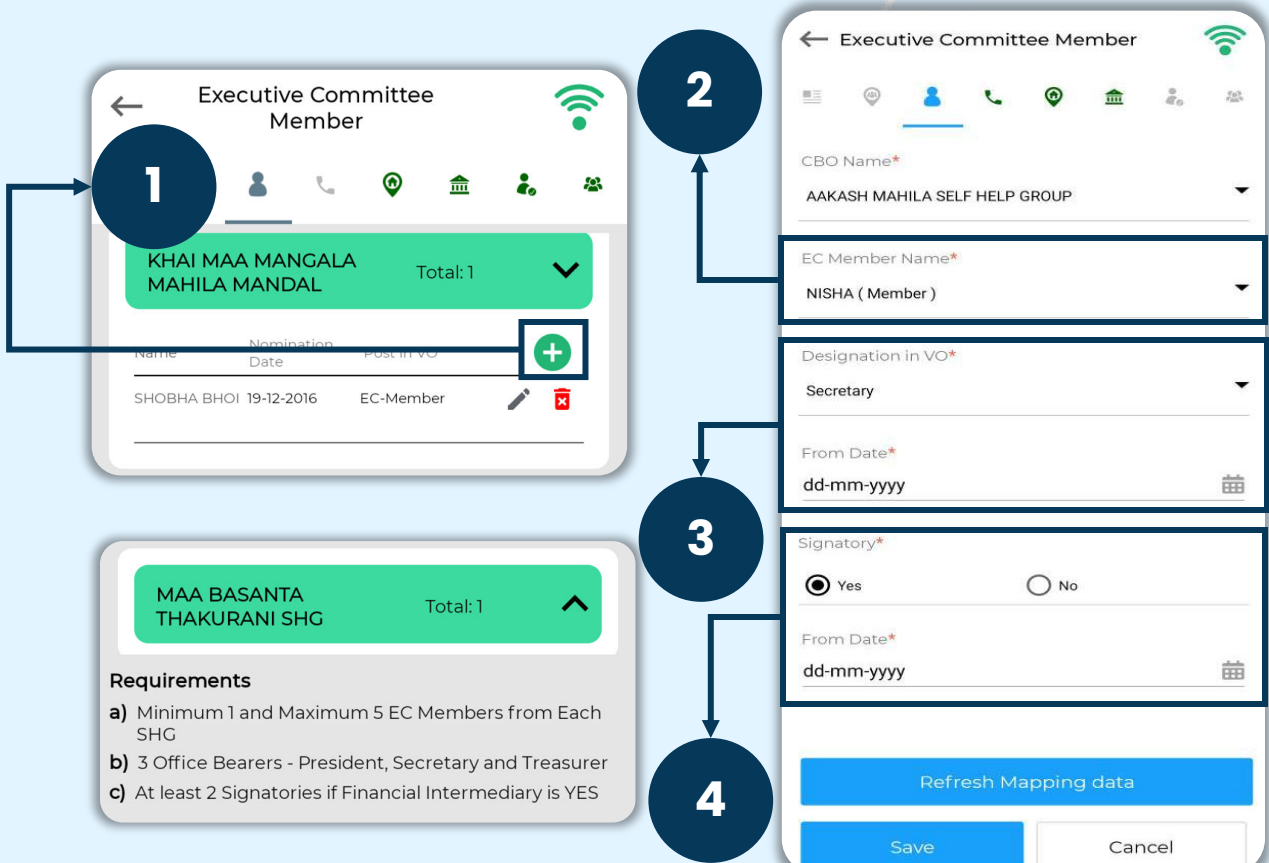
Select Settlement Status from the drop-down If the settlement status is 'Pending', then no member of this SHG will be required in the EC member screen

6

Click on 'Map and Upload the SHG'

Note:

- ☐ Multiple SHG's can be Unmapped
- ☐ An SHG can't be Unmapped if any Member of that SHG is an EC Member or a part of any Sub committee




1 Click on (+) button to add EC Members in the VO

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

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

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

Note:

- ❑ Linked SHG card displays automatically
- ❑ If the Office Bearers are changed in the VO, the VO resolution copy needs to be updated in the VO Basic details
- ❑ 3 Office Bearers (President, Secretary & Treasurer) and 2 signatories are required if the VO is a financial intermediary
- ❑ Wi-Fi  icon means that 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

Name (Designation)	KISHAN DEI (Vice-President)
Mobile number	8218356086

Name (Designation)	RITU RANI (Secretary)
Mobile number	7088481210

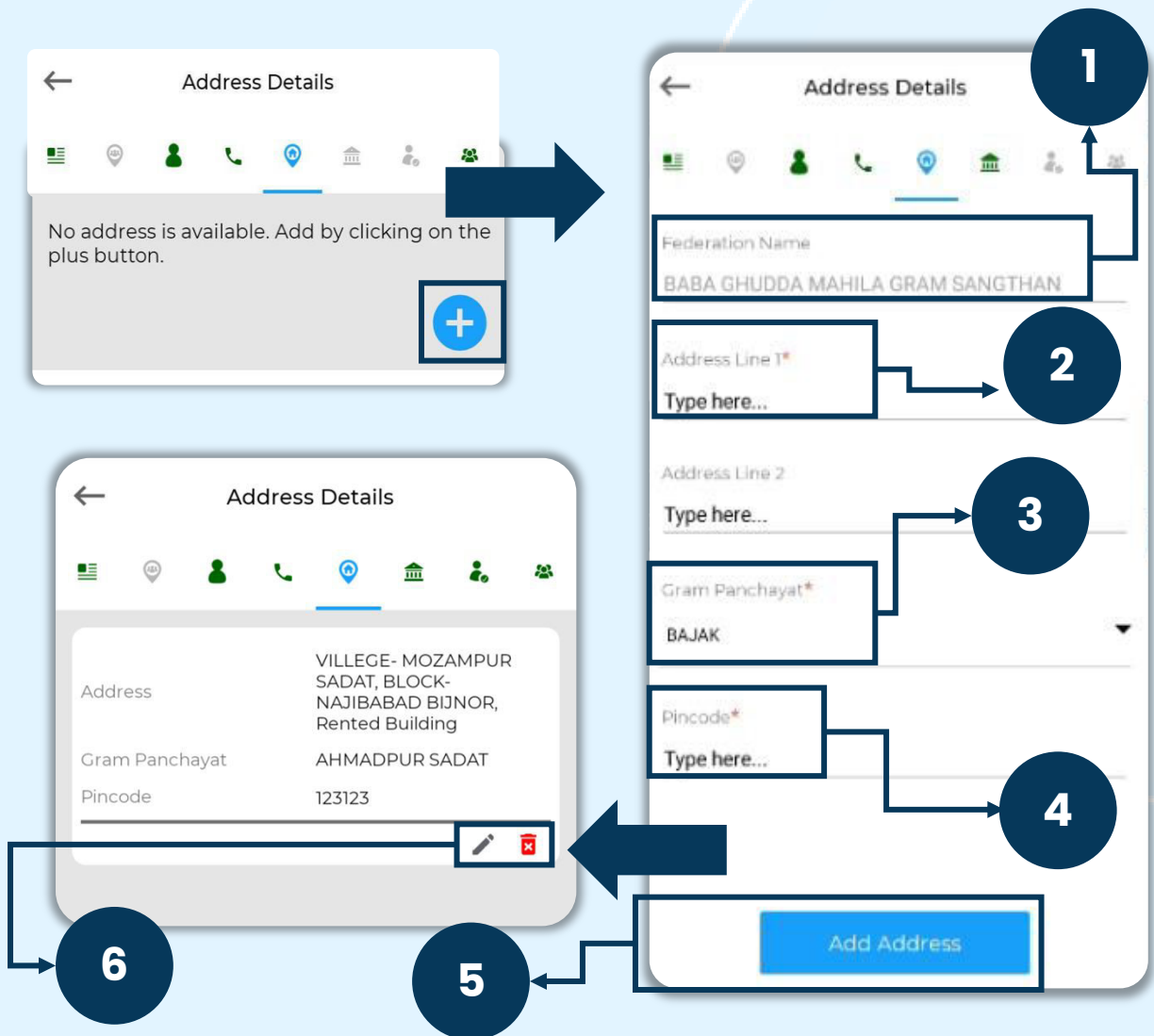
Name (Designation)	SANTOSH (Joint-Secretary)
Mobile number	8057185454

Name (Designation)	KAMLESH (Treasurer)
Mobile number	9027072074

Note:

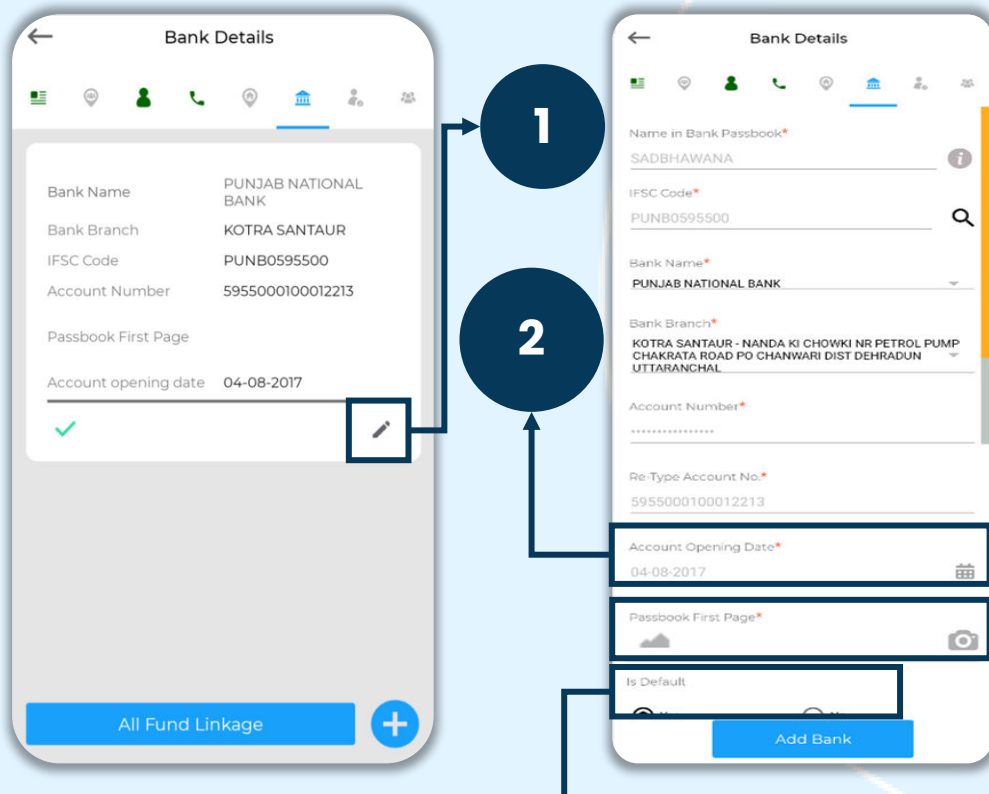
- ❑ The Office Bearer's mobile numbers will be considered the mobile numbers for the VO
- ❑ Office bearer's name, designation and mobile number will show automatically
- ❑ The updating of mobile number can only be done in the member's profile

05 Entry of VO Address Details



- 1 CBO Name: Auto-populated
- 2 First line of the 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 User can edit and delete the existing or new address of the VO

06 Entry of VO Bank Detail Screen



- 1 Bookkeeper (BK) can edit bank account details
- 2 Account Opening Date - Users can modify the account opening date
- 3 Passbook image - Users can capture the passbook image, but it cannot be captured after the approval from BPM
- 4 Status - Users 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 has 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 this account. But the user is allowed to mark it as inactive if anything is wrong with the account details

07 Entry of VO KYC Document

The diagram illustrates the process of adding a KYC document. It begins with a 'KYC Details' screen that displays 'No kyc available. Add by clicking on plus button'. An arrow points to a second 'KYC Details' screen, which shows the following steps:

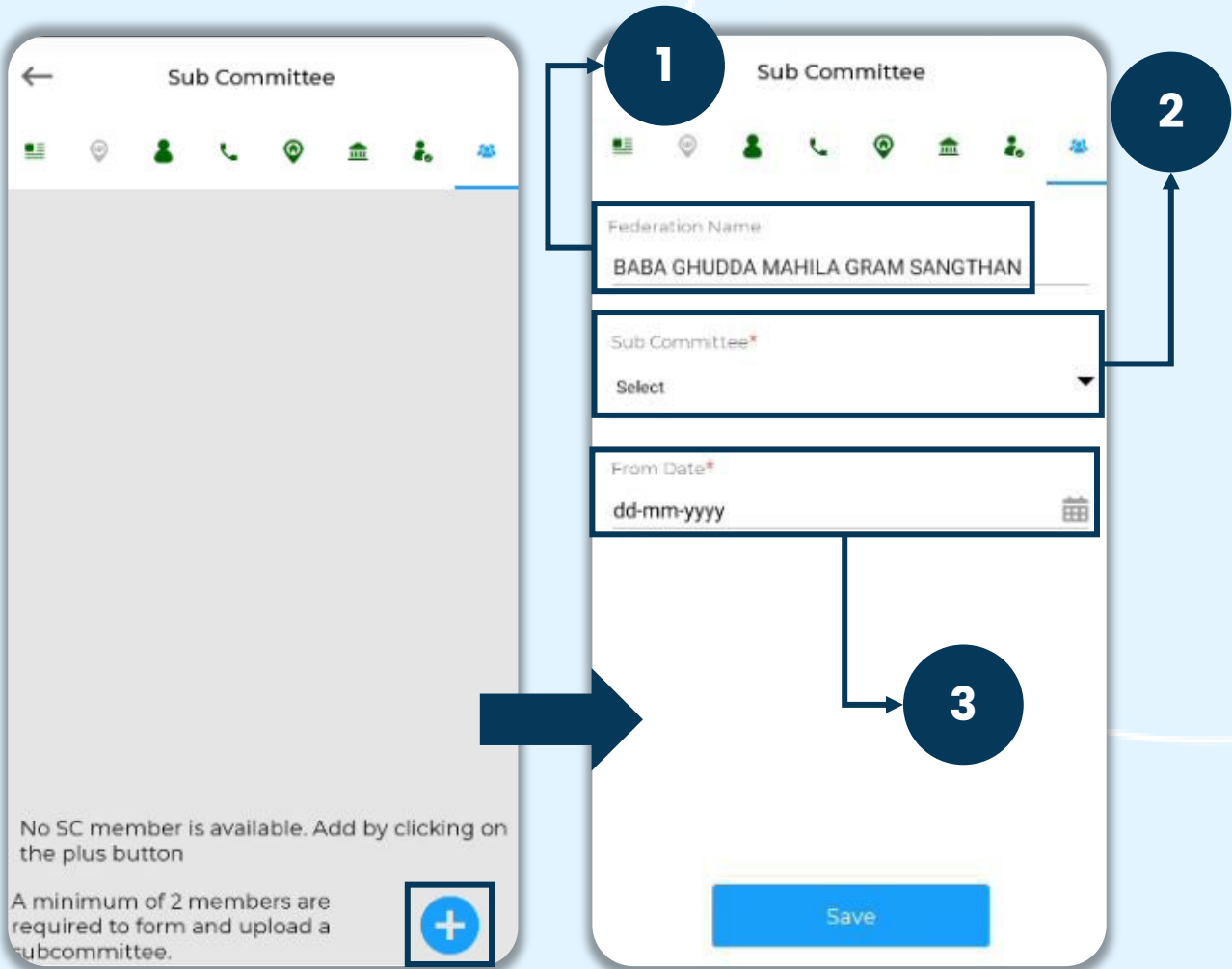
- 1** Select KYC Document Type* (Options: Select, TAN, PAN)
- 2** Enter ID* (Field: Type Here...)
- 3** Upload Front Photo* (Field with camera icon)
- 4** Click to add KYC (Button: Add KYC)

- 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 VO Sub Committee



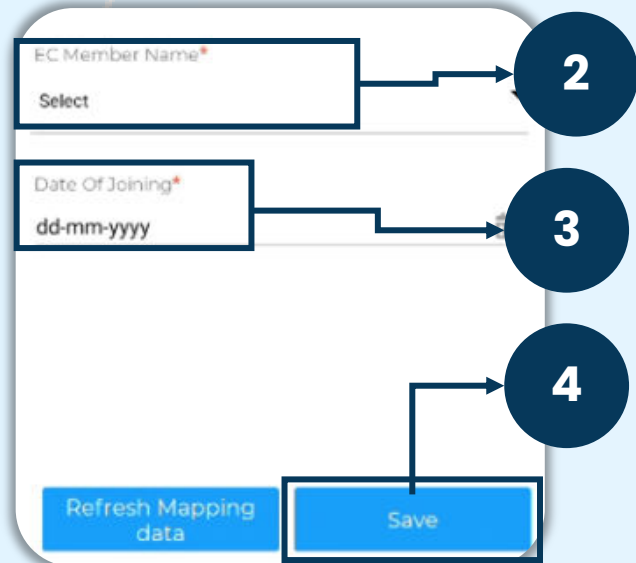
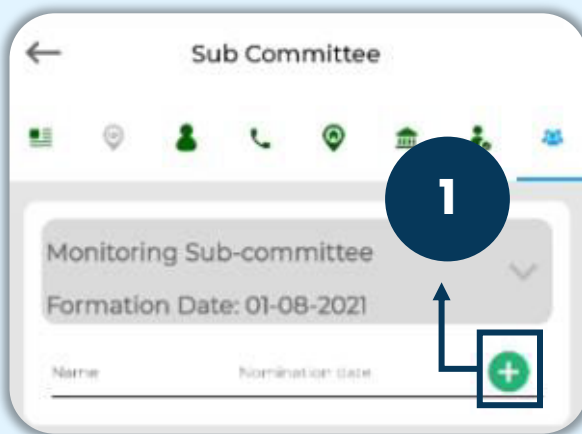
The screenshot shows the 'Sub Committee' entry form. Callout 1 points to the 'Federation Name' field, which is pre-filled with 'BABA GHUDDA MAHILA GRAM SANGTHAN'. Callout 2 points to the 'Sub Committee' drop-down menu, which is currently set to 'Select'. Callout 3 points to the 'From Date' field, which is pre-filled with 'dd-mm-yyyy'. A large blue arrow points from the left screen to the right screen, indicating the flow of the process. The left screen shows a message: 'No SC member is available. Add by clicking on the plus button' and 'A minimum of 2 members are required to form and upload a subcommittee.' with a plus button icon.


- 1 Federation Name is automatically populated
- 2 Select 'Sub Committee' from the drop-down list
- 3 Select the date from which 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 VO 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

09 Synchronization Type-1



1

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

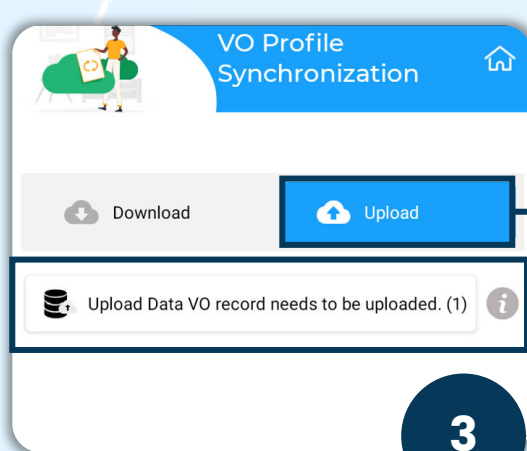
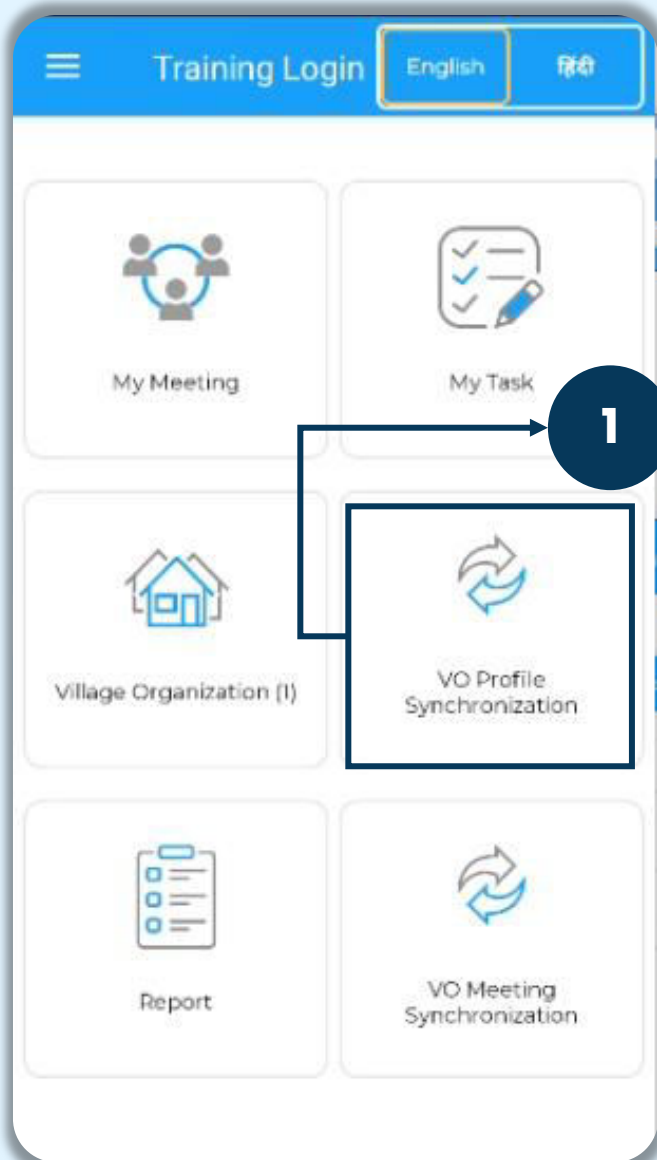
2

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

Note:

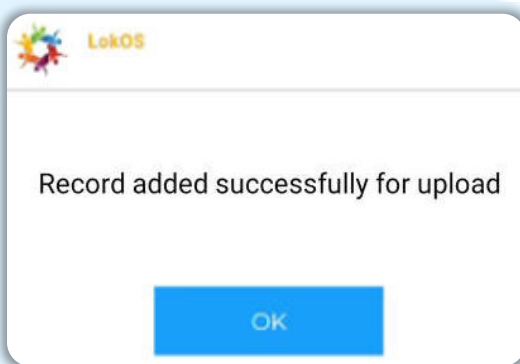
- ☐ The user has to check if the VO upload requirements have been completed or not. If not complete, then the upload button is disabled
- ☐ Internet connection is mandatory to upload the record
- ☐ When the VO records are updated and ready to upload, then the VO's left vertical bar color changes from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

Synchronization Type 2



To upload the data:

- Minimum 5 SHGs should be mapped
- 1 EC from each SHG required
- 3 Office bearers - President, Secretary, Treasurer are required
- Bank account & 2 Signatories are mandatory if Financial Intermediary is Yes
- Address of VO



1 Click on the VO Profile Synchronization

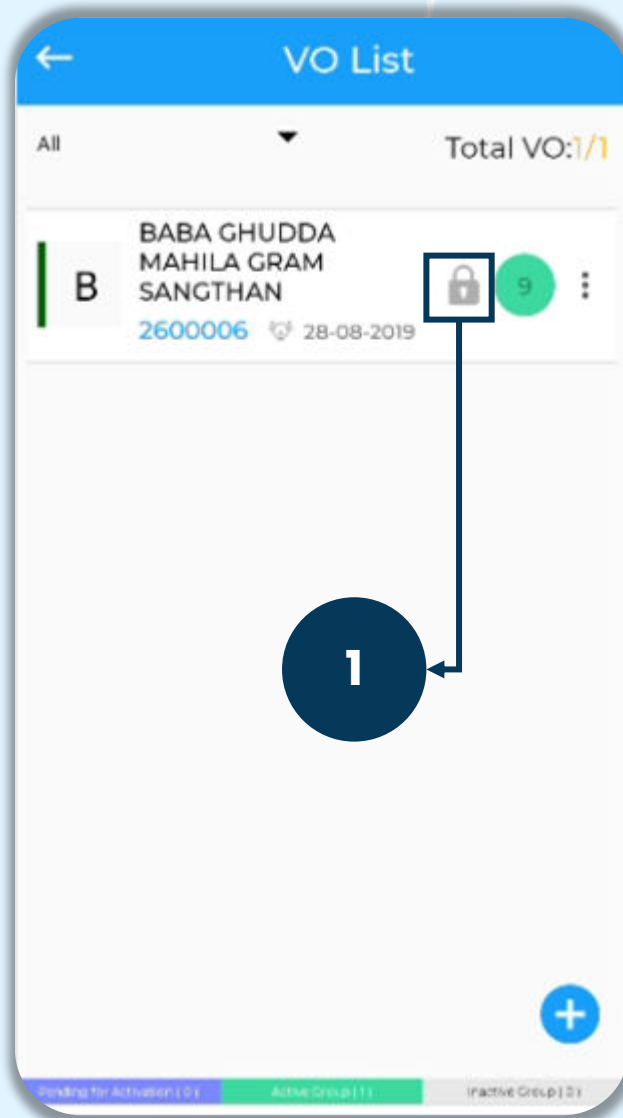
2 Click on the 'Upload' button

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

Note:

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

Synchronization Type 2

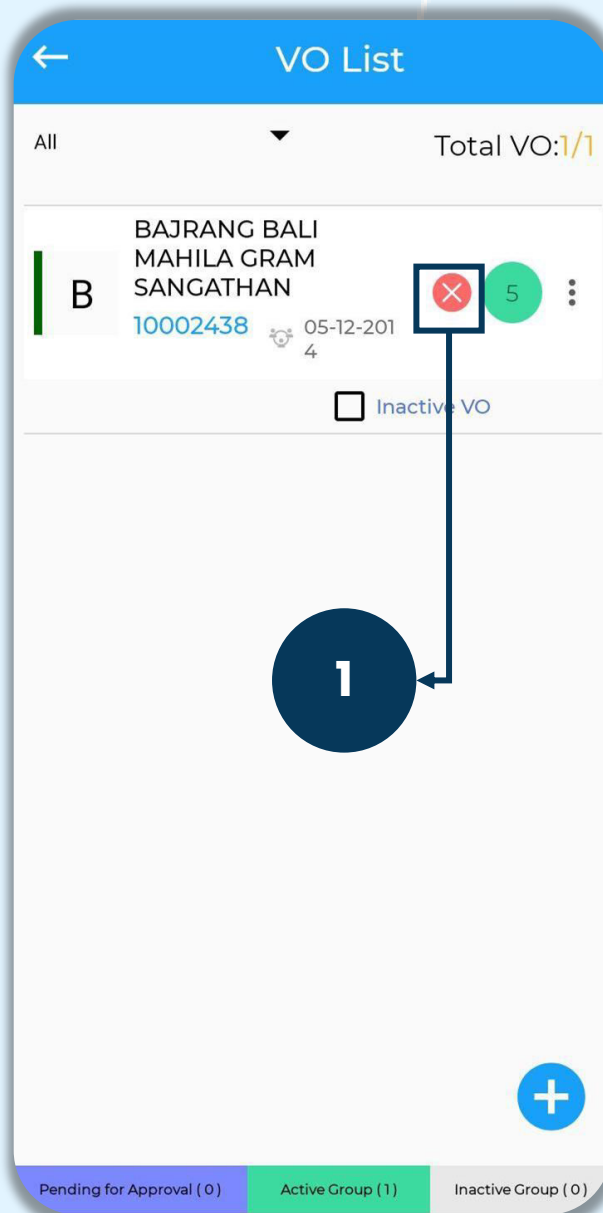


1

The user can check the lock Icon after uploading the data which means VO is uploaded successfully

Note:

- After synchronization, all records will show on Web and BPM can check & verify VO



1

The cross denotes that the VO Profile has been rejected

Note:

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

