

"Credit Co-Operative Society Software Features"



SHYAM INFOTECH

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Web Solution With All
Advanced Features.



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Website: www.shyaminfotech.com



1. Scheme Management

Package:- 01 <

- ▶ FD,RD,DD,MIP,BOND Creation
- ▶ Normal Roi, Special Roi Provision
- ▶ Penalty Provision
- ▶ Grace Period Setting
- ▶ ROI compounding facility
(Like Monthly, Quarterly, Half yearly, Yearly)
- ▶ RD Multiple Mode facility
(Like Monthly, Quarterly, Half yearly, Yearly)
- ▶ Discount Facility on
Quarterly, Half yearly, Yearly submission of installment
- ▶ Minimum Amount Condition.
- ▶ Amount Multiple off.
- ▶ Scheme List Report Plan Wise
- ▶ Loan against Deposit.
- ▶ Edit Option for Scheme
- ▶ Amount wise Special Roi Provision
- ▶ Activation & Deactivation of Schemes
- ▶ Scheme Wise Prematurity management.
- ▶ Scheme Wise Irregular management.

2. Member Management

- ▶ Members Registration
- ▶ Members Edit Registration
- ▶ Members Approval
- ▶ Members Report
- ▶ Members Photo, Signature, Id Proof, Address Proof Upload
- ▶ Member Complete Summary Report
- ▶ Member Approve Today

3. Agent Management

- ▶ Agent Registration
- ▶ Edit Agent Registration
- ▶ Agent Report
- ▶ Agent Approval
- ▶ Agent List By Post
- ▶ Agent Down line
- ▶ Agent Up line
- ▶ Commission Information scheme wise
- ▶ Member to Agent Creation
- ▶ Agent Promotion History
- ▶ Agent Promotion Date wise
- ▶ Agent Promotion (Manual, Auto)
- ▶ Update Designation
- ▶ Direct Policy
- ▶ Direct Installment
- ▶ Down Line Policy
- ▶ Down line Installment
- ▶ Deleted Policy Record
- ▶ Due Promotion Report
- ▶ Insert Commission
- ▶ Credit business Provision (Mostly Used in Agent Promotion)

4. Transactions

- ▶ Fixed Deposit
- ▶ New RDP Policy
(With Mode Selection Facility Monthly/ Quarterly/Half yearly/ Yearly)
- ▶ MIP Policy
- ▶ Bond Policy
- ▶ Daily Policy
- ▶ Approve Policy
- ▶ Installment Receipt
- ▶ Approve Installment Receipt
- ▶ Pre Maturity Management
- ▶ IR-Regularity Management

5. Payments

- ▶ Policy Maturity Payment Branch Wise
- ▶ Issue Cheque (Cash,Cheque,Transfer to Saving A/c)
- ▶ Agent Wise Commission
- ▶ Policy Wise Commission
- ▶ Paid MIP Payment Report
- ▶ Agent Commission Payout
- ▶ Paid Maturity Report
- ▶ Month Wise Commission
- ▶ MIP Policy Payment (Cash,Cheque,Transfer to Saving A/c)
- ▶ Wallet Dashboard

6. Reports

- ▶ Policy List
- ▶ Due RD Installment Report
- ▶ Receipt Information
- ▶ Complete Policy Information
- ▶ RD Installment Report
- ▶ In Out Report
- ▶ User Tracking Report

7. Print

- ▶ Policy Certificate Print
- ▶ Passbook Print Setup
- ▶ Statement Print (RD, DD)
- ▶ Share Certificate Print
- ▶ Cash Receipt Print
- ▶ Passbook Reprint Setup (RD, Saving)
- ▶ Default, Customized Print

8. SMS

- ▶ Id Wise Sms
- ▶ Registration Sms
- ▶ City /State wise Sms
- ▶ Non bank detail holders Sms
- ▶ Group Master
- ▶ Loan Wise Sms
- ▶ Down line Wise Sms
- ▶ Scheme wise Sms
- ▶ Non pan card holder Sms
- ▶ Birthday Sms
- ▶ Add new Contact
- ▶ Other Sms

9. User Manager

- ▶ Branch Master (N Numbers of Branch Creation Facility)
- ▶ Branch Staff (N Numbers of Staff Creation Facility With Page Rights)
- ▶ Manage Back Date & Future Date Entries
- ▶ Manage Agent & Members Ship Fees
- ▶ Fetch password
- ▶ State City Master
- ▶ Region Master
- ▶ Designation Master
- ▶ Designation Role, & there Rights
- ▶ Backup data

10. Saving Account Management

- ▶ Saving Account Master
- ▶ New Saving Account
- ▶ Saving Account Report
- ▶ Saving Account Summary
- ▶ Transaction Saving Account
- ▶ Cheque Management
- ▶ Balance Information
- ▶ Saving Account Statement
- ▶ Account Statement
- ▶ Issue Cheque Book
- ▶ Cheque Book Report
- ▶ Saving Account Edit (only in Joint Account)
- ▶ Saving Account Penalty
- ▶ Saving Account Interest
- ▶ Deactivate Saving Account
- ▶ Saving A/c Penalty Report
- ▶ Saving A/c Interest Report
- ▶ Activate Saving Account

11. Loan

- ▶ Loan Master
- ▶ New Loan
- ▶ Approve Loan
- ▶ Loan List
- ▶ Due Loan Installment
- ▶ Loan Issue Cheque
- ▶ Loan Penalty Report
- ▶ Loan Installment
- ▶ Loan Installment Approval
- ▶ Loan Closing
- ▶ Loan Installment Report
- ▶ Loan Statement
- ▶ Loan Installment Print

12. Share

▶ Share Master

▶ Share Report

▶ Share Withdrawal

▶ Share Withdrawal report

13. Website

▶ Vacancy apply for

▶ Add City

▶ Career Report

▶ Feedback Report

▶ News Manager

14. Login Panels

▶ Admin Panel

▶ Branch/Staff Panel

▶ Company Website

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Package:- 02



1. All Feature of Package 01

2. Member/Advisor Panel

- | | |
|---------------------|------------------------|
| ▶ Edit Profile | ▶ View Profile |
| ▶ Commission Report | ▶ Downline Direct |
| ▶ Downline All | ▶ Payment Statement |
| ▶ Policy Info | ▶ Policy Info Direct |
| ▶ Installment Info. | ▶ Policy Info Downline |
| ▶ Account Balance | ▶ Mini Statement |
| ▶ Account Statement | ▶ Pay Installment |
| ▶ New RD Policy | ▶ New FD Policy |
| ▶ New MIP Policy | ▶ New Bond Policy |

3. Accounting

▶ Journal Report

▶ Trial Balance

▶ Ledger Report

▶ Cash Flow

▶ Payment Voucher

▶ Sub Group

▶ Income Voucher

▶ Journal Voucher

▶ Approve Voucher

▶ Voucher Report

▶ Transfer to Profit and Loss Account

▶ Balance Sheet

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Package:- 03



1. All Feature of Package 02

2. Advance Features

- | | |
|---------------------------------|-------------------------------|
| ▶ Branch Wise Plan Management | ▶ Branch Wise Rank Management |
| ▶ Spot Commission | ▶ Advance Payment to Agent |
| ▶ Advance Adjustment From Agent | ▶ Branch Start/Stop Option |
| ▶ Set Office Time | ▶ Set Office Holidays |
| ▶ Staff Leaves | ▶ Policy Active/Deactive |
| ▶ Policy Holder Change | ▶ Policy Agent Change |
| ▶ DD Bulk Renewal | ▶ Bulk Renewal Report |
| ▶ Leg Shift | ▶ Delete Installment |
| ▶ Regional Manager Panel | |

3. Payroll

- | | |
|------------------------|--------------------------|
| ▶ Position Master | ▶ Employee Master |
| ▶ Employee Report | ▶ Salary Making |
| ▶ Advance Management | ▶ Manual Increment |
| ▶ Salary Report | ▶ Increment Report |
| ▶ Due Promotion Report | ▶ Advance Payment Report |

4. Some Additional Features

- | | |
|---------------------------|------------------------------------|
| ▶ Document Master | ▶ Document Report |
| ▶ Multiple Receipt Print | ▶ Saving Account Statement (Print) |
| ▶ Opening Balance | ▶ Share Dividend |
| ▶ Share Dividend Payment | ▶ Delete Voucher |
| ▶ Policy Balance | ▶ Bank Wise Ledger report |
| ▶ Agent Collection Report | |