BridgeLine Partners

Field App User Guide

Disbursement · Collections · History — for Sales Officers & Branch Managers

This app has **3 tabs** at the top: **Disbursement** (raise a new loan disbursement request), **Collections** (track and follow up on open cases for your cluster), and **History** (see what you've already submitted from this phone).

Part 1 — Install the App (One-Time Setup)

1 Open the link

Most officers use an **Android phone** — open this link in **Chrome**:
disbursement-request-form.vercel.app
On an **iPhone**, open the same link in **Safari** instead.

2 Add it to your Home Screen

Android (Chrome): tap the **three-dot menu** (top-right) -> **Add to Home screen** (or **Install app**) -> **Add / Install**.
iPhone (Safari): tap the **Share icon** (square with an arrow up) -> **Add to Home Screen** -> **Add**.
A **BridgeLine** icon with the bridge logo will now appear on your home screen, just like any other app. You only need to do this once.

Part 2 — Disbursement Tab

Raise a new loan disbursement request

1 Fill in the details

Enter the **Date, Cluster, Branch, Customer Name, Phone Number, SO Name, Gold Weight, Amount Required, Bank, Account No. and IFSC Code**.
Cluster and Branch here are **free to pick for every request** — they describe the customer's branch, not your own, so choose whichever is correct for that customer.

2 Scan the 4 documents

Tap **Scan / Upload** under each box: Aadhar Card, PAN Card, Pledge Card, Security Cheque.
Your camera will open — take a clear, well-lit photo of each document. The Security Cheque photo is automatically checked against the Account No. you typed.

3 Generate & send

Tap **Generate Message** to see a summary of everything you entered.
If the cheque photo doesn't match the Account No., you'll see a red warning and won't be able to proceed until it's fixed — retake the cheque photo or double-check the account number.
Tap **Send via WhatsApp** — the message and all 4 photos go together to whichever contact/group you pick.

Part 3 — Collections Tab

Track open cases and follow up with customers

1 Select your cluster — CAREFULLY

The very first time you open Collections, you'll be asked: **"Which cluster are you in?"**
Pick the **cluster you actually work in**. This determines which customers' open cases you will see and follow up on.

IMPORTANT: Once you select your cluster, it gets LOCKED on your phone. You will NOT be able to change it yourself afterwards — only the BridgeLine Partners office can unlock it for you (by sharing a one-time admin PIN). Take an extra few seconds now to make sure you're selecting the CORRECT cluster before tapping "Save & Continue".

2 View your open cases

Once your cluster is set, you'll see a list of all **open (not yet fully collected) cases** for your cluster, along with 3 totals at the top: **Disbursed Today, Collected Today, and Total Outstanding**.
Each case shows the customer, branch, amount, status, total due, and how much has been collected so far — including partial payments.
A small colored badge shows how many **days the case has been open**: green = recent, amber = due soon, red = **overdue** and needs urgent follow-up.

3 Search for a specific case

Use the search box to quickly find a case by typing the **customer name** or **Disbursement ID**.

4 Attach documents & send

On the case you're following up, tap **Attach Documents** to open the RTGS Form and Payment Screenshot upload boxes.
Tap **Scan / Upload** on each — you can take a new photo or choose one already saved in your gallery (useful for payment screenshots).
Tap **Send via WhatsApp** — the case details and both documents go together to your chosen contact/group. You must attach at least one document before it will let you send.

5 Refreshing & offline use

Tap **Refresh** any time to pull the latest case list.
If you lose internet connection, the app will still open and show the last data it loaded, with a yellow "You're offline" banner at the top — so you're never stuck with a blank screen.

Part 4 — History Tab

See what you've already submitted

1 Check your recent submissions

The History tab lists every Disbursement request and Collection document you've sent **from this phone**, newest first, with the date and time.
Use this before raising a new request to make sure you haven't **already submitted it**.

Quick Tips

- Always use **Chrome** (Android) or **Safari** (iPhone) — not Files or a WhatsApp preview — to open the app the first time.
- **Pick your Collections cluster carefully** — it locks after you save it. Only the BridgeLine office can unlock it for you with an admin PIN.
- Double-check the **Account No. and IFSC Code** on Disbursement requests before sending — these cannot be edited after sending.
- If **Send via WhatsApp** doesn't attach photos, tap **Copy Message** instead and paste it manually, then attach photos from your gallery.
- Keep documents well-lit and flat in frame for a clear scan — this also helps the cheque account-number check succeed.
- Check the **History** tab before resubmitting anything, to avoid duplicate requests.

Scan to open the app

Or open this link in Chrome (Android) / Safari (iPhone):
disbursement-request-form.vercel.app

Need your Collections cluster unlocked, or have any other issue? Contact your branch coordinator or the BridgeLine Partners office.