



STANDARD OPERATING PROCEDURE FOR UNIFIED DARPAN ANDROID APP

Department of Posts
Ministry of Communications
Government of India



DARPAN

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1. Login Screen:

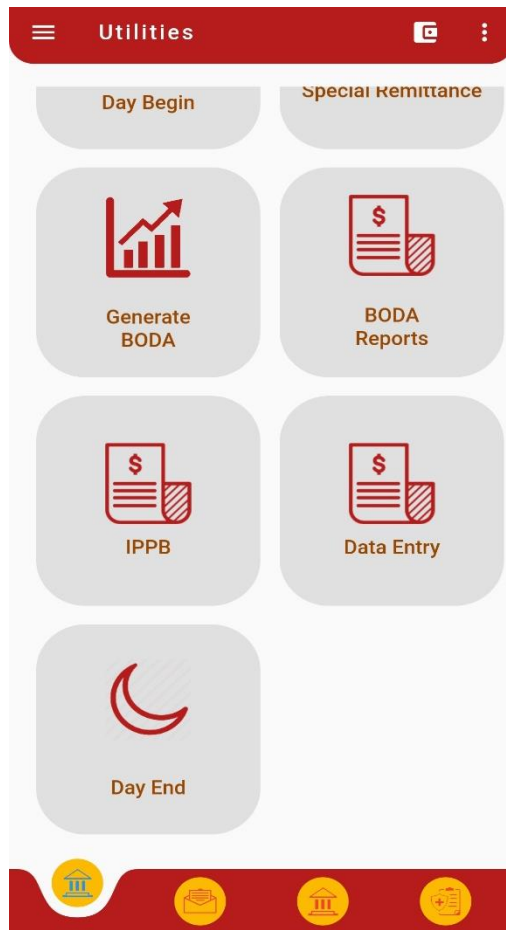
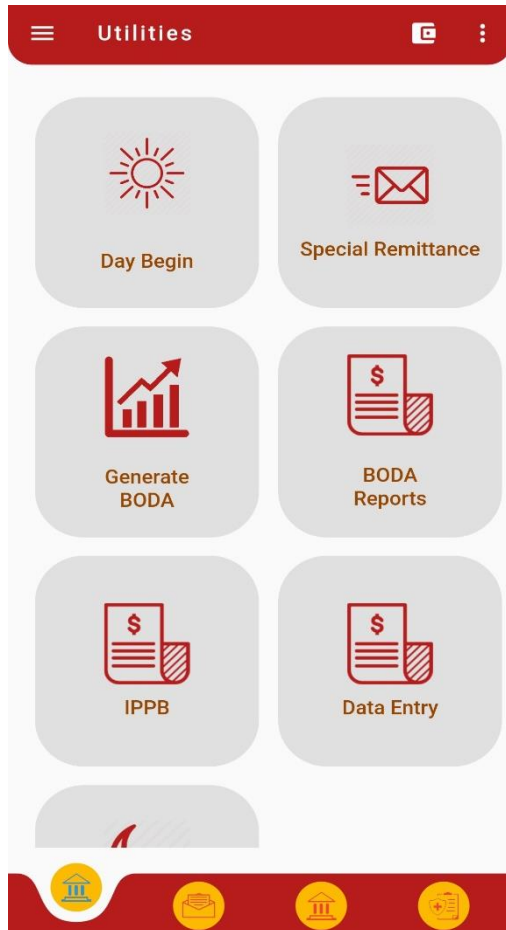
- First time, User require to login the APP with his employee ID by entering default Password (Dop@123)
- Click on Get OTP, OTP will be receiving to the BPM Mobile number(Personal) linked in the User Management Portal and BPM needs to enter the OTP manually for verification and select submit button.
- On post Clicking on submit button, redirect into change password screen.
- User has to enter new password and confirm password then Click on Get OTP to verify OTP to get changed password.



2. Home Screen (Utilities)

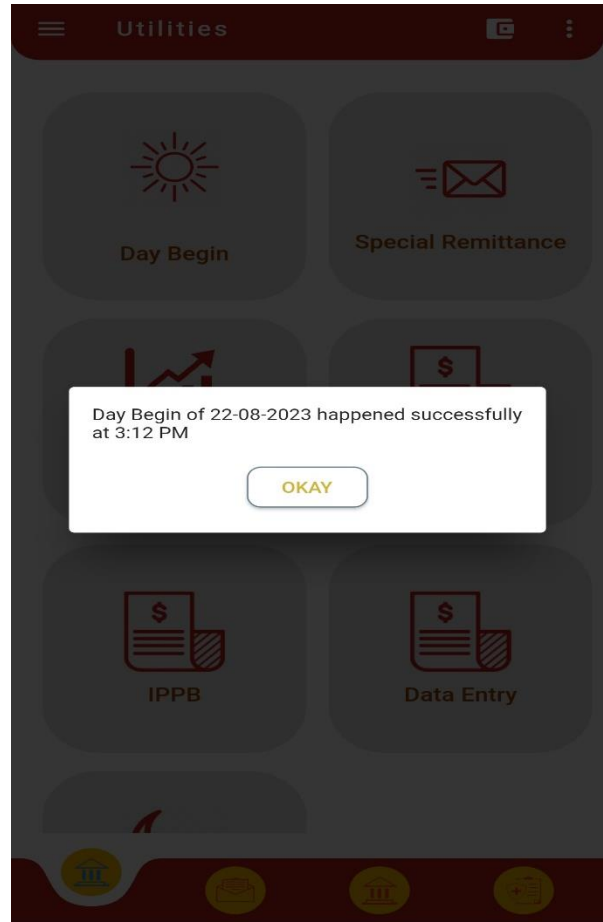
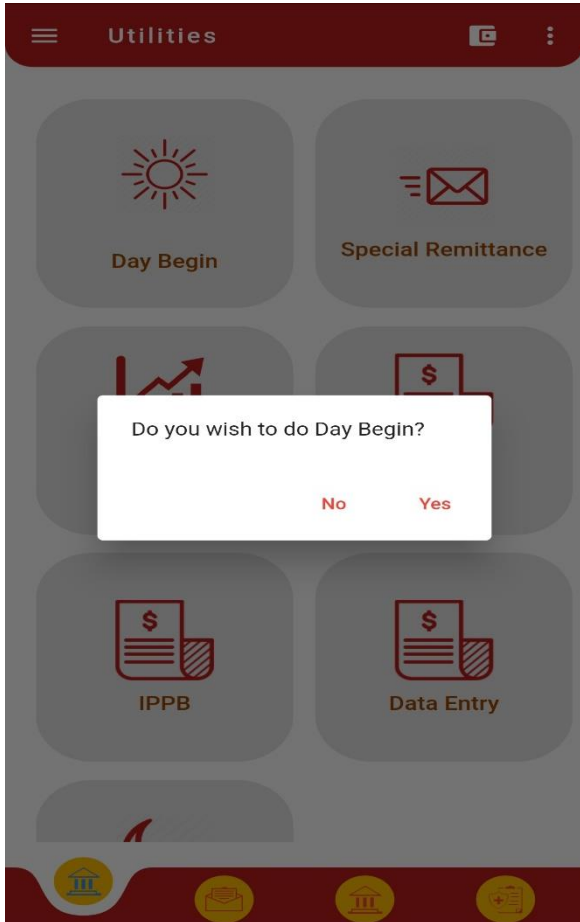
User will see the following Menus in Utility Screen:

- Day Begin
- Special Remittance
- Generate BODA
- BODA Reports
- IPPB
- Data Entry
- Day End



2.1 Day Begin

- Day Begin is required for accessing DARPAN Application Modules before making any operations.

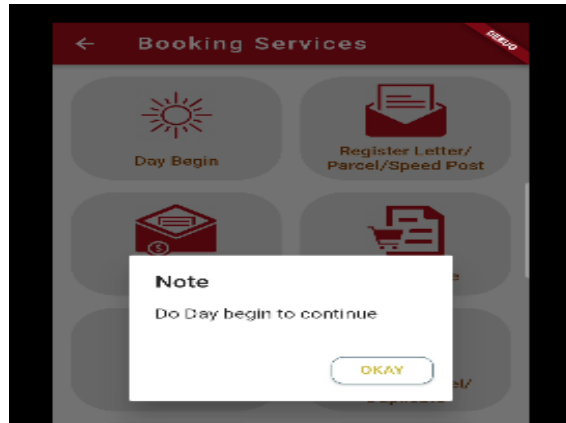


Step 1: Click on the Day Begin icon. Click on “Yes” link.

Step 2: A confirmation message “Day Begin of <Current Date>happened successfully at < Current time> will appear.

Step 3: Click “OKAY” to continue for the Day Begin.

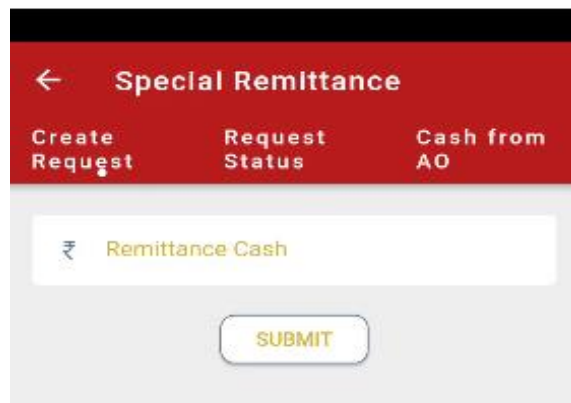
No Operations allowed before day Begin:



- Without day begin , if uses tries to book any accountable articles one error will pop up ” **Do Day begin to continue**”

2.2 Special Remittance

- 1) User can request cash from AO at any point of time.



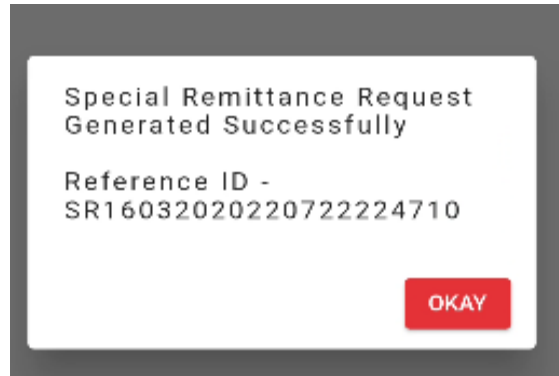
Step1: Click on create request tab.

Step2: Enter cash amount to be requested from AO.

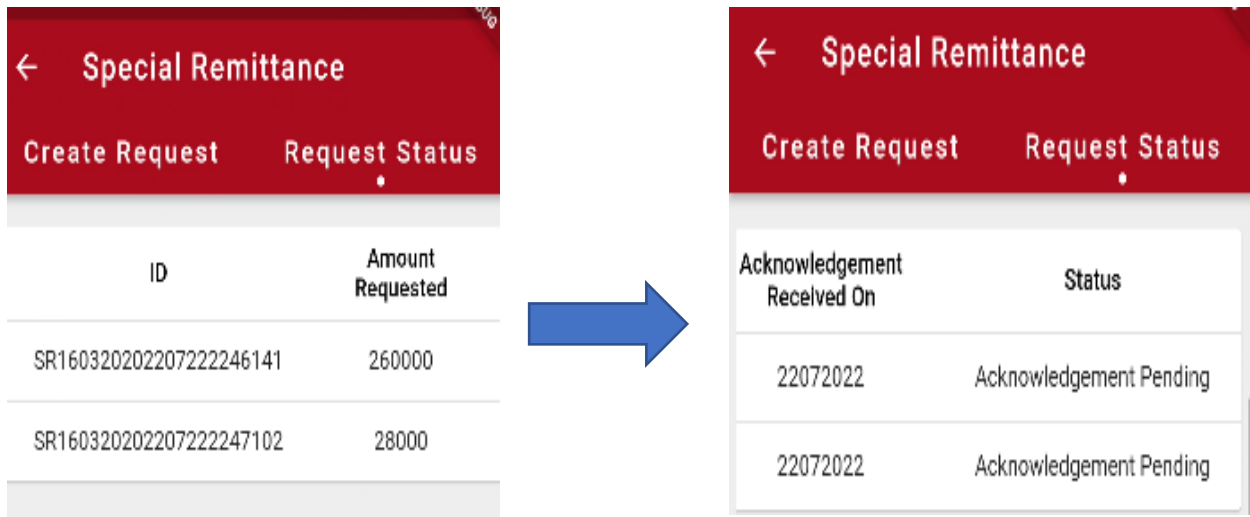
Step3: Click 'Submit' button.

Step 4: On clicking the 'Submit' button, a confirmation message "Special Remittance Request generated successfully" will be displayed on the screen.

Step 5: Click 'OK' button to continue.



2) Special Remittance Status:



Step 6: Click on the 'REQUEST STATUS' tab to check the status of the request.

- Initially, the status of a request is “Acknowledgment Pending” i.e. the request has been created but acknowledgment for that request is not yet received. Once the acknowledgment is received on the device, the status for that request will get changed from “Acknowledgment Pending” to “Acknowledged” and a confirmation button will appear adjacent to the status.

3) **Cash from AO:** If BO receives cash (by hand) from AO, User can enter the amount here using this option. Amount of cash received will be reflected in cash wallet. Please note that, user can enter the cash received (by hand) only once in a day using this option.

The screenshot shows a mobile application interface titled "Special Remittance". At the top, there is a navigation bar with a back arrow and the title. Below the navigation bar, there are three menu items: "Create Request", "Request Status", and "Cash from AO". The "Cash from AO" option is selected, indicated by a small red dot. Below the menu items, there is a text input field labeled "Cash From AO" containing the value "₹ 5000". A "SUBMIT" button is located below the input field. A white dialog box is displayed in the foreground, containing the text "Rs. 5000 received successfully from Account Office." and a red "OKAY" button.

2.3 Generate BODA

- After Day end Branch office daily account (BODA) will be generated on the device for the current business day after entering liability, cash to AO and Cash indent if any.

←
Branch Office Daily Account

Excess ₹103929.00

Closing balance of Tippur B.O exceeds the maximum sanctioned amount of ₹20000 limit by ₹103929.00.

Cash from AO :

Cash to AO : ×

📄 Liability Reason

Cash Bag Weight : Weight ×

Cash Indent from AO for Liability :


Documents to AO

📄 | all docs


CANCEL

CONFIRM

←
BODA Slip 🖨️ 📄



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BO2130911000417012023

Hosamalangi B.O
Date of Transaction : 17-01-2023
Balance of last daily Account : ₹ 12547.00

RECEIPTS

Opening Balance Amount	:	₹ 12547.00
IPPB Deposits Value	:	5
Bag Cash	:	₹ 1000 ▼
TOTAL RECEIPTS	:	₹ 16000.0

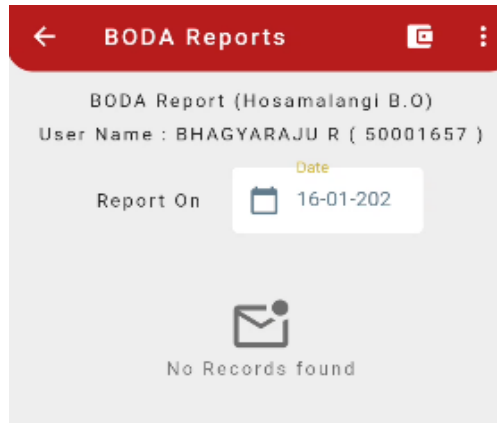
PAYMENTS

Cash to AO	:	₹ 9000
IPPB Withdraw Value	:	10
TOTAL PAYMENTS	:	₹ 14000.0

CASH BALANCE

Cash & Currency Notes Amount	:	₹ 14547.00
------------------------------	---	------------

2.4 BODA Reports



- Using this option User can generate BODA for old dates for Max last 15 days.

2.5 IPPB

- Data Entry for IPPB (Deposits & Withdrawals) may be entered
- User has to select date and then click on search button to get required fields for entering IPPB Transaction details
- IPPB Transactions Details such as Number of Deposits, Total Deposit Amount, Number of withdrawals and Total withdrawal amount has to be entered based on the IPPB Transactions carried out on the day.

Transaction Date:	17-01-2023
Total No.of Deposits:	5
Total Deposit Amount:	15000
Total No.of Withdrawals:	10
Total Withdrawal Amount:	5000

- Click on submit will show transactions accounted for the day.

2.6 Data Entry

Data Entry Provision has been given for accounting the D Cube, CSC and any other transactions.

Data Entry Daily Transaction Report

DCube ▼ Date 23-08-2023

Search Back

DCube Transaction Details

Number of withdrawals 8

Total Withdrawal Amount 8000

Submit Cancel

Data Entry Daily Transaction Report

CSC ▼ Date 23-08-2023

Search Back

CSC Transaction Details

Number of Deposits/Receipts 1

Total Deposit/Receipt Amount 150

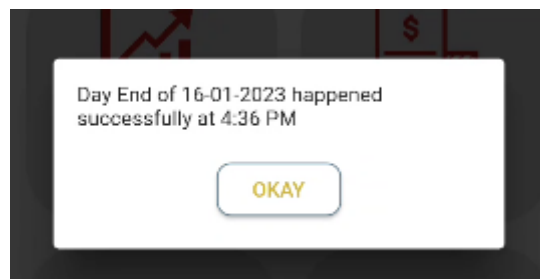
Submit Cancel

2.7 Day End

Day End is required to end the current business date operations and generate BODA report.

The following are the blocking validations for day end. Hence these transactions to be completed before performing day end.

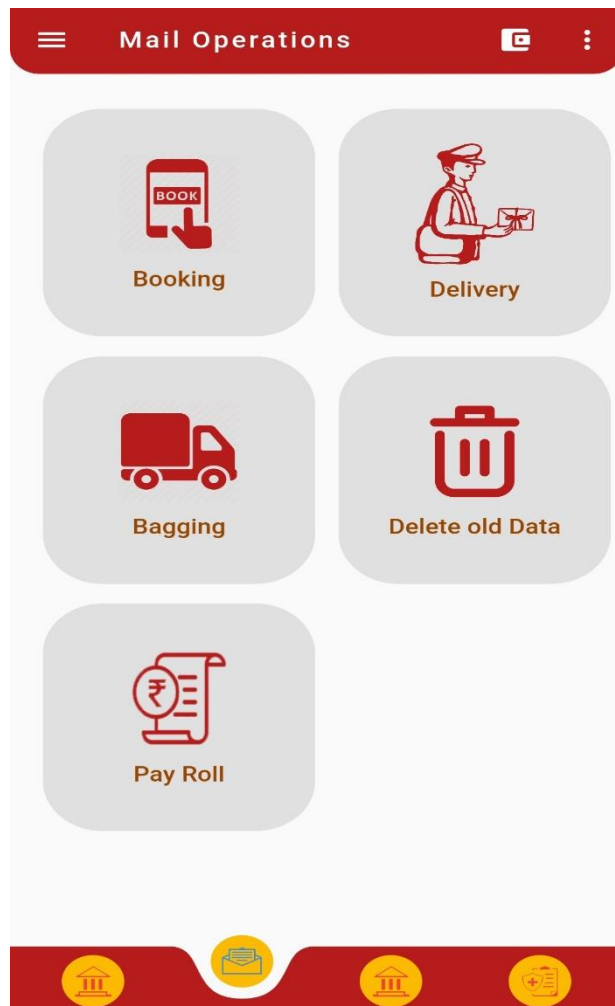
- CBS and PLI pending transactions.
- IPPB data entry.
- Accountable mail articles returns pending.
- Booking of VPMO for VP delivered articles.



3. Mail Operations:

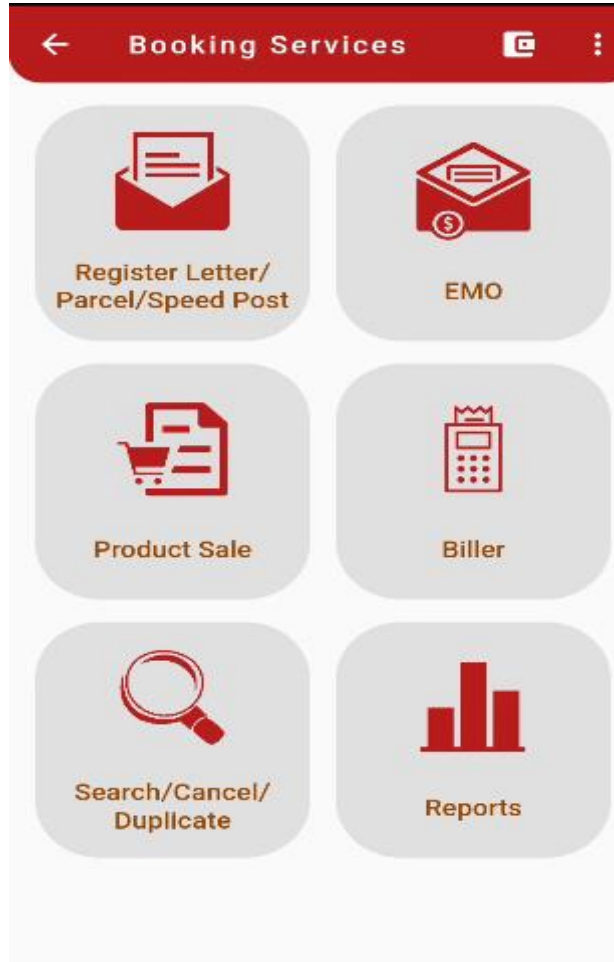
Following Modules are available.

- **Booking Module**
- **Delivery Module**
- **Bagging Module**
- **Delete old Data**
- **Pay Roll**



3.1 Booking Module

- Post click on Booking Module, Functionalities available in Booking Module will be displayed.



- 3.1.1 **Register Letter/Parcel/Speed Post:** User has the provision to book Registered Letter/Parcel/Speed Post using this module.
- 3.1.2 **EMO:** User has the provision to book Money Order Electronically using this module
- 3.1.3 **Product Sale:** This module is meant for sale of stamps / inventory.
- 3.1.4 **Billor:** User can book third party bills using this module.

3.1.5 Search/ Cancel/ Duplicate: User can Search or Cancel the transaction. Also, there is a provision to print the Duplicate Receipt of Transaction made (Except EMO).

3.1.6 Reports: This module generates following reports:

- Cancelled Articles reports
- Transaction reports
- Inventory reports
- Cash/card reports
- Cash balance reports
- Digital reports

3.1.1 Article Booking: Register Letter /Parcel/Speed Post

The screenshot shows the 'Article Booking' screen in a mobile application. At the top, there is a red header with a back arrow, the title 'Article Booking', a camera icon, and a menu icon. Below the header, there are several input fields and sections:

- Article Number:** A field containing the text 'RK200920231IN' with a QR code icon on the left.
- Weight in gms*:** A field containing the number '20' with a lock icon on the left and a clear icon on the right.
- Prepaid Amount:** A field with a rupee symbol and the text 'Prepaid Amount'.
- Additional Services:** A section with three toggle buttons: 'Acknowledgement' (which is active and highlighted in red), 'Insurance', and 'VPP'.
- Payment mode:** A section with two radio buttons: 'Cash' (which is selected) and 'Digital'.
- Booking Type:** A section with two radio buttons: 'Regular' (which is selected) and 'Service'.

Step 1: User has to select Register letter/Parcel/Speed post for booking

Step 2: User need to enter /scan 13 digits Article number using digital barcode scan button.

Step 3: Enter the weight of the article up to 2000 grams.

Step 4: Enter prepaid amount, if any

Step 5: Select any additional service (Conditional).

Acknowledgement: For getting acknowledgement

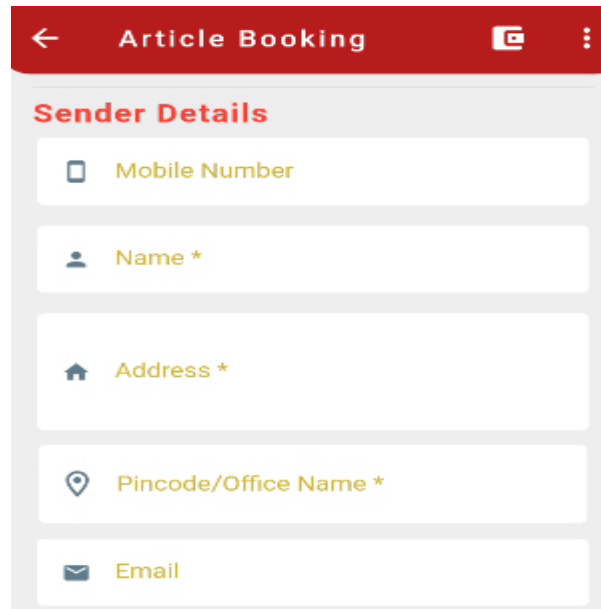
Insurance: For Insurance of registered article. Enter Insurance amount which should not be greater than Rs. 600 and VPP amount (if applicable).

VPP: Enter VPP amount, if checkbox is selected.

Step 6: User need to select Payment Mode either cash or digital.

Step 7: User has to select either regular / service.

Sender Details:



The screenshot shows a mobile application interface for 'Article Booking'. The title bar is red with a back arrow, the text 'Article Booking', a camera icon, and a menu icon. Below the title bar, the section 'Sender Details' is highlighted in red. It contains five input fields, each with a small icon and a label: 'Mobile Number' (phone icon), 'Name *' (person icon), 'Address *' (house icon), 'Pincode/Office Name *' (location pin icon), and 'Email' (envelope icon). The fields are stacked vertically and have a light gray background.

Step 8: Enter sender's "Mobile No." It should be of 10 digits (Optional).

Step 9: Enter the Sender's Name

Step 10: Enter the Sender's Address.

Step 11: Enter Sender Pin code/ Office Name. Select the "Pin code- Office Name" from the list auto populated.

Step 12: Sender city and state will be automatically filled based on selected Pin code/Office Name.

Step 13: Enter sender email id. It should be in the format of "username@domainName.com" (Optional).

Addressee details:

Addressee Details

☎ Mobile Number

👤 Name *

🏠 Address *

📍 Pincode/Office Name *

✉ Email

BOOK ARTICLE

₹ 17

Step 14: Enter Addressee “Mobile No.” It should be of 10 digits (Optional)

Step 15: Enter the Addressee's Name

Step 16: Enter the Addressee's Address

Step 17: Enter Addressee Pin code/ Office Name. Select the “Pin code-Office Name” from the list auto populated. Addressee city and state will be automatically filled based on chosen Pin code/Office Name.

Step 18: Enter Addressee email id. It should be in the format of “username@domainname.com” (Optional).

Booking Preview:



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Article Number : **RK200920231IN**
Weight : **20 gms**
Prepaid Amount : ₹ 0.0
Acknowledge Amount
₹ 3

Register Letter fee : ₹ 17.0
Amount to be paid : ₹ 25
Payment Mode : **Cash**

Sender : **Rajendra**
Bengaluru, BENGALURU, Karnataka, 560001
Mob# : 90000000005

Addressee : **Raghavendra**
Mysore, Mysuru, Karnataka, 570001

CANCEL **BOOK**

Step 19: User can check the details in booking preview.

Step 20: Select option “Book” or “cancel”.

Booking Confirmation:

RK200920231IN Booking Confirmation



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Article Number : **RK200920231IN**
Weight : **20 gms**
Prepaid Amount : ₹ 0.0
Acknowledge Amount
₹ 3

Registration fee : ₹ 17.0
Amount paid : ₹ 25
Payment Mode : **Cash**

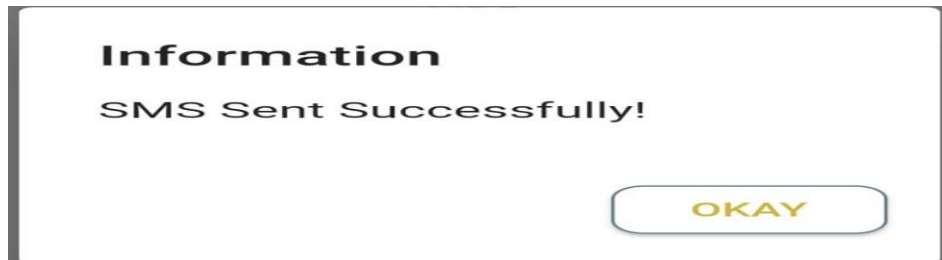
Sender : **Rajendra**
Bengaluru, BENGALURU, Karnataka,
560001
Mob# : 90000000005

Addressee : **Raghavendra**
Mysore, Mysuru, Karnataka, 570001

PRINT **OK** **Send SMS**

Step 21: If user selects option “book”, article will be booked and he will get above confirmation.

Step 22: Click on “Send SMS” button. Once SMS sent, “SMS Sent Successfully” message will appear on the screen and customer will get the booking information to his/her Mobile number.



Step 23 : “Okay “button .

Step 24 : Click on “ Print” button to print the receipt.

Step 25 : Click on “OK” button to complete the transaction.

Note: Till receipt of Printer at BO, the receipt of a transaction will be sent through SMS to the customer’s Mobile.

3.1.2 EMO Booking:

The screenshot displays the EMO booking interface. The top header is split into 'EMO' and 'PMO Relief Fund'. The form includes several input fields: 'Please select the message code', 'Please select the VP article', '₹ EMO Value *', and '₹ Commission'. Below these is a 'Sender Details' section with fields for 'Mobile Number(for SMS *)', 'Name *', 'Address *', 'Pincode/Office Name *', and 'City'. A red button with '₹ 0' is visible at the bottom right of the form. To the right, a dropdown menu is open, showing a list of VPMO options: 'VPMO', 'Money for treatment of illness', 'Wish you speedy recovery', 'Money for payment of loan', 'Money for your admission', 'Wish you success in your study', 'Money for your books', 'Hearty congratulations on success in examination', 'Confirm receipt of money order', 'Do not waste money, use cautiously', 'I am ok, write about your well being', 'Humble offering to the Lord', 'If you need more money, let me know', 'Happy birthday! Get a gift of your choice', and 'Shagun for marriage'.

Step 1: Select EMO / PM Relief Fund.

EMO: - It is a money order transfer service in which commission is charged.

PM Relief fund: - In this service, commission is not charged.

VPMO: - In case of booking of VPMO, select VPMO from the message code and select the VP article number from the drop down menu.

Step 2: Enter the amount up to Rs. 5000 in “eMO Value”. In case of VPMO, based on the article data, VPMO amount and commission will auto populate.

Step 3: Select the message code from drop down. This is the message user wants to send along with the money (optional).

Step 4: “Commission Amount” is the commission charged on eMO value. It will be automatically populated on screen.

Step 5: Enter “Sender Details” such as Mobile Number

Step 6: Name of sender.


Step 7: Enter Address of a sender.

Step 8: Enter Sender Pin code/ Office Name.

➤ Select the “Pin code-Office Name” from the auto populated list.

Step 9: Enter sender email id. It should be in the format of “username@domainName.com” (Optional).

Step 10: Enter the addressee details and submit:



The screenshot shows a mobile application interface for the PMO Relief Fund. At the top, there is a red header with 'EMO' and 'PMO Relief Fund'. Below the header, there are several input fields for user details: 'City', 'State', and 'Email'. A section titled 'Addressee Details' in red text contains four more input fields: 'Mobile Number', 'Name *', 'Address *', and 'Pincode/Office Name *'. Each field has a small icon to its left (e.g., a house for City, a person for Name, a house for Address, and a location pin for Pincode/Office Name).

Step 11: Enter payee's mobile number. Mobile number should be of 10 digits (Optional).

Step 12: Enter “Addressee/Payee Details” such as Name of payee

Step 13: Enter Address of payee.


Step 14: Enter Payee Pin code/ Office Name.

➤ Select the “Pin code-Office Name” from the auto populated list.

Step 15: Enter payee's email id. Email id should be in the format of “username@domainName.com” (Optional).

Step 16: Select submit button.

EMO Booking Preview:



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EMO Value ₹ 100	Commission Amount ₹ 5
--------------------	--------------------------

Amount to be collected :- ₹ 105

Message :-
Money for your books

Sender : **Rohit**
Cept, KORAPUT, Odisha, 764036
Mob# : 99999999

Addressee : **Srujan**
Bangalore, BENGALURU, Karnataka, 560001
Mob# : 9484948494

Step 16: User can check the details in booking preview.

Step 17: Select option “Book” or “cancel”.

Confirmation

Successfully booked an EMO of
₹105
PNR Number
049213011673525565

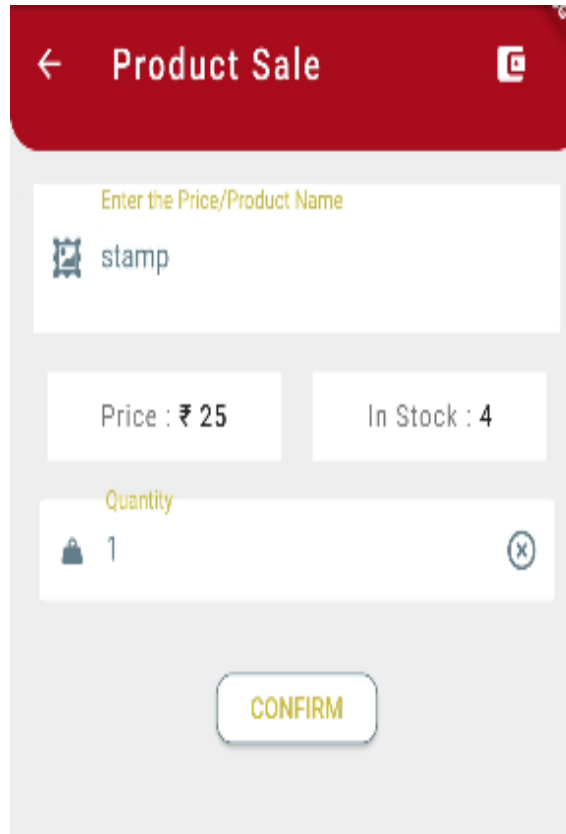
EMO Confirmation:

Step 18: If user selects option “Book”, eMO will be booked and he will get above confirmation.

Step 19: Click “Okay” button to confirm and print the receipt.

Note: Two receipts are to be generated. First copy should be handed over to the customer and second one should be sent to AO along with the Manual eMO application submitted by the sender.

3.1.3 Product Sale:



The screenshot shows a mobile application interface for 'Product Sale'. At the top, there is a red header bar with a back arrow on the left, the text 'Product Sale' in the center, and a square icon on the right. Below the header is a white input field with the placeholder text 'Enter the Price/Product Name'. The field contains a blue icon of a stamp and the text 'stamp'. Below this field are two white boxes: the left one contains 'Price : ₹ 25' and the right one contains 'In Stock : 4'. Below these is another white input field with the placeholder text 'Quantity'. This field contains a blue icon of a shopping bag, the number '1', and a blue circular icon with an 'X'. At the bottom center of the screen is a yellow button with the text 'CONFIRM'.

1. Enter the Sale price of the product. Select the "Item Code" from the values auto populated.
2. Enter the quantity for the selected item code. Payable Amount will be calculated automatically and populated on screen.
3. Click 'Print' button to print the receipt.

3.1.4 Biller Collection:

The screenshot shows a mobile application interface for 'Biller'. At the top, there is a red header bar with a back arrow on the left and the word 'Biller' in the center. Below the header, there are two tabs: 'Collection' (which is active, indicated by a white dot) and 'Search'. Underneath the tabs, there is a search bar with the placeholder text 'Enter the Price/Product Name'. The search bar contains the text 'ID b'. Below the search bar, the text '2923 -> BSNL KTK LL' is displayed.

1. Biller module comprises of two operations:

- COLLECTION
- SEARCH

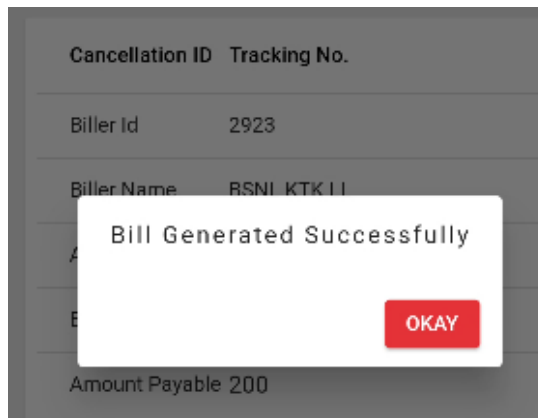
The screenshot shows a form for biller collection. It has a light gray background. At the top, there are two columns: 'Cancellation ID' and 'Tracking No.'. Below this, there are several rows of information, each separated by a horizontal line:

Biller Id	2923
Biller Name	BSNL KTK LL
Account No.	1234
Bill Date	21-07-2022

Below the table, there is a section for 'Amount Payable' with the value '200'. Underneath that, there is a section for 'Collected Amount' with the value '₹ 200' and a close button (an 'x' in a circle). At the bottom of the form, there is a yellow 'SUBMIT' button.

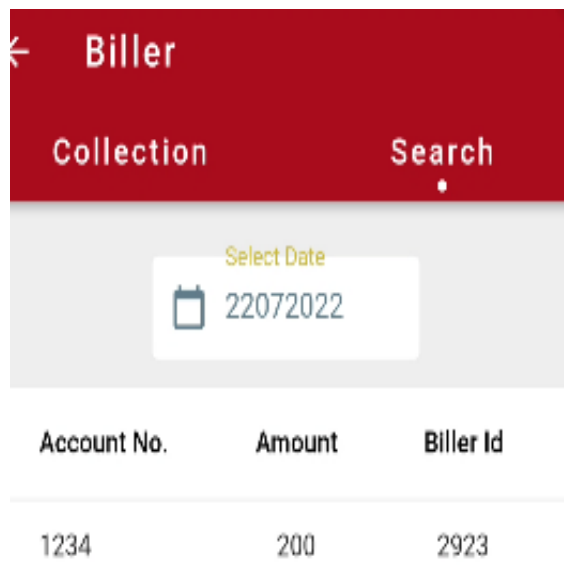
COLLECTION: User can collect the bill amount using below steps:

- Enter the 'Biller Id'.
- Enter the 'Account Number'.
- Select 'Bill Date' from the calendar
- Enter the Payable Amount
- Click "submit button"



- Bill generates successfully

SEARCH: User has the provision to search Biller details on the basis of date of booking



3.1.5 Search/Cancel/Duplicate:

Search/Cancel Transaction:

Transaction ID : SL0492130041673944129
Article No. : RN000000014IN
Sender Name : Shiva Shankar
Amount : ₹ 25
Booked On : 17-01-2023
Status : Booked

Confirmation..!
Select the Reason for cancelling the RN000000014IN?
Wrongly Booked
CONFIRM

1. Enter Article No. to be cancelled
2. Click on the 'Cancel' button to confirm and cancel the searched transaction.
3. Reasons for cancel has to be selected (Wrongly Booked, Amount Mistake & Others) and click on confirm will cancel the booked article.

NOTE: Booked Transaction can be cancelled if the transactional data has not been synchronized with the central server.

3.1.6 Reports:

3.1.6.1 Cancelled Articles Reports:

Cancelled Articles 1 ^		
Tracking No.	Total Amount (₹)	Reason
RN000000014IN	₹ 25	Wrc

Cancelled Articles 1 ^	
Reason for Cancellation	Recipient No.
Wrongly Booked	SL22-07-2022RN000

- Cancelled Articles report shows the list of all the transactions cancelled on the device for the business day along with other details.

3. 1.6.2 Transaction reports:

Transaction Reports

Detailed Transaction wise Report
(Nawalpura B.O)
User Name : MAYANK(4903)
Report Date: 22-07-2022

Transactions

Category	Receipt No.	T	N
EMO	SL0022-07-2022222139	2:	

Transactions

Tracking Number	Recipient Name
22-07-2022222139	Test Receiver

Transactions

Delivery Pin	Prepaid Amount (₹)	Total Amount (₹)
600001	0	525

Details

Service Name	Total Quantity	Total Amount
EMO	1	₹ 525
REGISTER LETTER	0	₹ 0
SPEED POST	0	₹ 0
PARCEL	0	₹ 0
SERVICE LETTER	0	₹ 0
SERVICE PARCEL	0	₹ 0
PM RELIEF FUND MO	0	₹ 0
VPMO	0	₹ 0

PRINT

- Transactions Details Report shows the daily transactions performed on the device for the current business day. It also depicts the summary of the booking transactions made for the current business date.

3.1.6.3 Inventory report:

Inventory Reports

Inventory Report (Nawalpura B.O)
User Name : MAYANK(4903)

Report On Date 22-07-2022

Item Description

Item Code	Item Name	Denomination
stamp5	stamp	₹5
envelope6	envelope	₹6
stam5	stam	₹5

Inventory Reports

Inventory Report (Nawalpura B.O)
User Name : MAYANK(4903)

Report On Date 22-07-2022

Item Description

OB Balance	OB Value	Sale Balance	Sale Value
25	₹ 125	25	₹125
5	₹ 30	5	₹30
6	₹ 30	6	₹30

- Inventory Report shows the stock of stamps, postal stationary etc. that is assigned by Sub Post Office to the Branch Office for sale.

3.1.6.4 Cash/card Report:

This is consolidated report of amount received from the following payment modes:

- Cash
- Card

Report On	21-07-2022
Cash	
Opening Balance	: ₹ 500.00
Amount Received	: ₹ 500.00
Closing Balance:	₹ 525.00
Card	
Amount Received	: 0.00

[PRINT](#)

3.1.6.5 Cash Balance Reports:

Cash Balance Report shows the detailed report of all the receipts and payments. It also depicts the Opening Cash Balance and Closing Cash Balance of the BO.

3.1.6.6 Digital Reports:

← Digital Report

Select the Type

LETTER ▼

Select Date

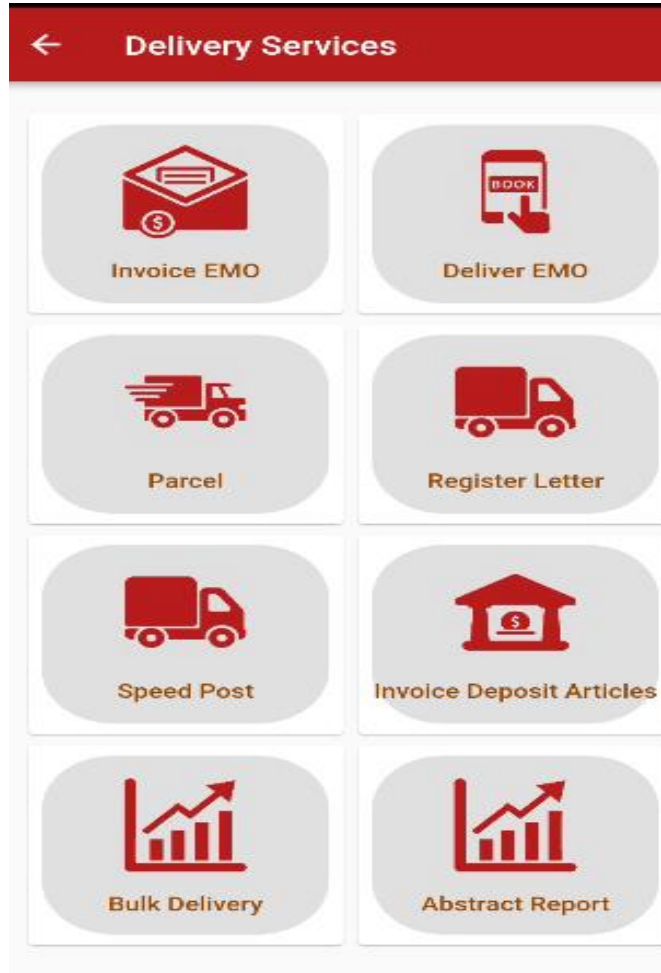
📅 17-01-2023

Transactions ^

Date/Time of Transaction	Receipt Number
17-01-2023 144218	SL0492130041673941

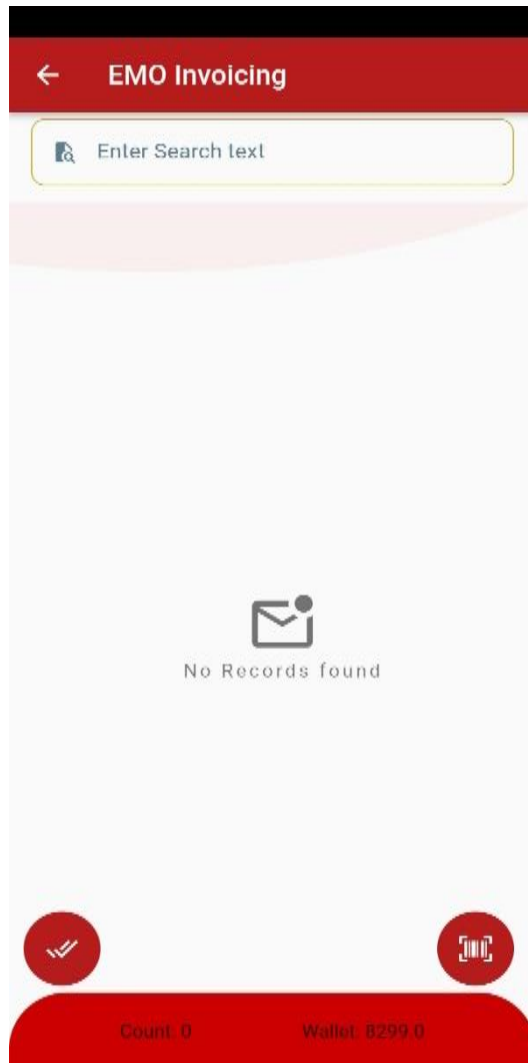
This report shows the transactions done by the user through digital payment.

3.2 Delivery Module:



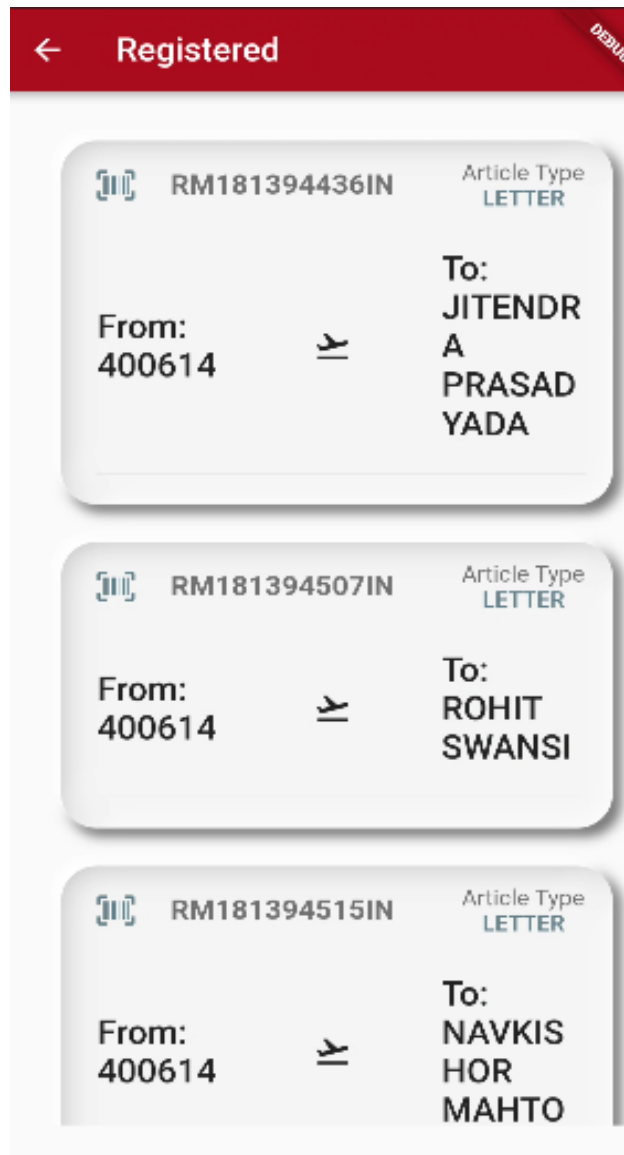
- 3.2.1 **Invoicing eMO:** Invoicing of eMOs will be done using this module.
- 3.2.2 **Deliver eMO:** eMOs are paid / disposed using this option.
- 3.2.3 **Parcel:** Parcel articles are delivered/ disposed using this module
- 3.2.4 **Register Letter:** Registered letters are delivered/ disposed using this module.
- 3.2.5 **Speed Post:** *Delivery/ Disposal of Speed Post articles are done using this module.*
- 3.2.6 **Invoicing of deposit articles:** Invoicing of articles are done in this option.
- 3.2.7 **Bulk Delivery:** Bulk Delivery of eMOs and articles are done using this module.
- 3.2.8 **Abstract Reports:** In this feature abstract reports are shown for Register Letter, Parcel, Speed post, Emo.

3.2.1 Invoicing eMO:



- All received eMOs can be invoiced by the user by using this module for payment.

3.2.2 - 3.2.5 Deliver Parcel/Register letter/Speed Post:





- Article No, Addressee name and Address will be auto populated on the screen and he has to click on each articles for taking returns.

a. Marking Delivery

Article Delivery DEBUG

Article Number Article Type **Registered Letter**

Remark time 

GPS Location 


SUBMIT


- Select “**Delivery**” as Delivery remark from the dropdown list for delivery of the article.

b. Marking Undelivered:

Article Delivery DEBUG

Article Number **Article Type** Registered Letter

Remark time 

GPS Location 

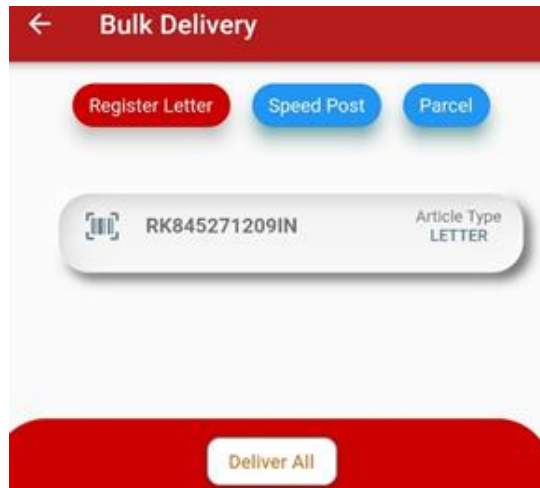
- Select “Redirection” from the drop down list and select reason for redirection

3.2.6 Invoicing deposit articles:



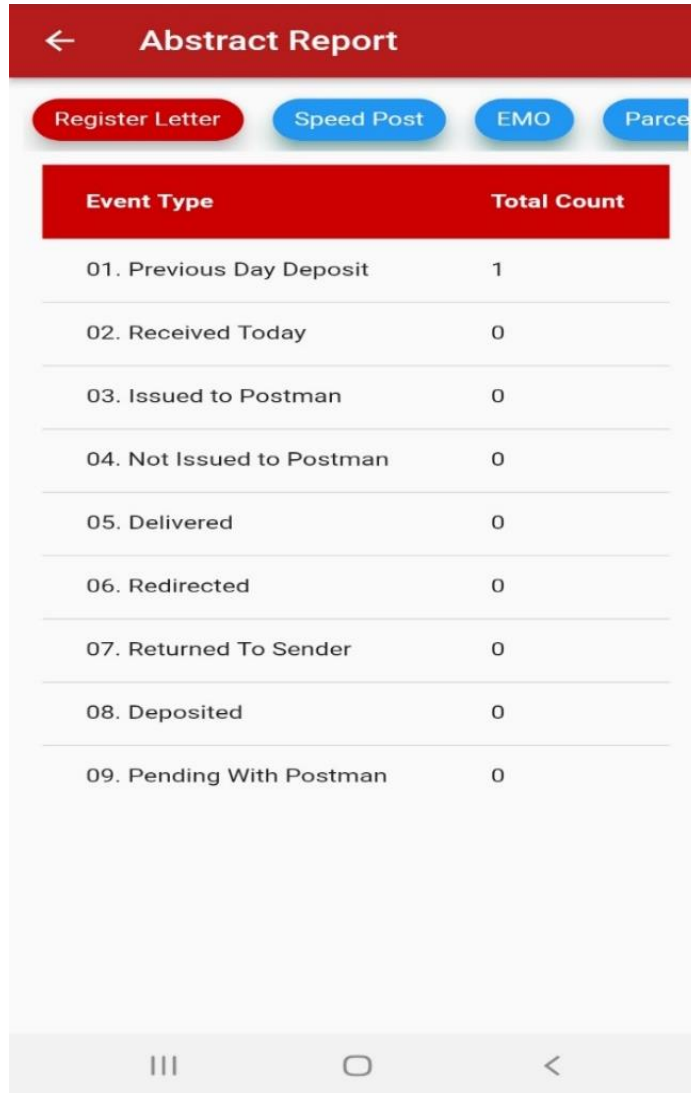
- Deposit articles which are expected to be invoiced to postman can be done using "Invoicing Deposit Articles" module. Deposit Articles can be delivered/updated only after invoicing.

3.2.7 Bulk Delivery:



- This option is for bulk delivery. User can use this option for bulk delivery of all accountable articles (RL, SP & PL).

3.2.8 Abstract Report:



Event Type	Total Count
01. Previous Day Deposit	1
02. Received Today	0
03. Issued to Postman	0
04. Not Issued to Postman	0
05. Delivered	0
06. Redirected	0
07. Returned To Sender	0
08. Deposited	0
09. Pending With Postman	0

- User can generate the abstract report for Registered Letter, Speed Post, Parcel and eMO using this module.

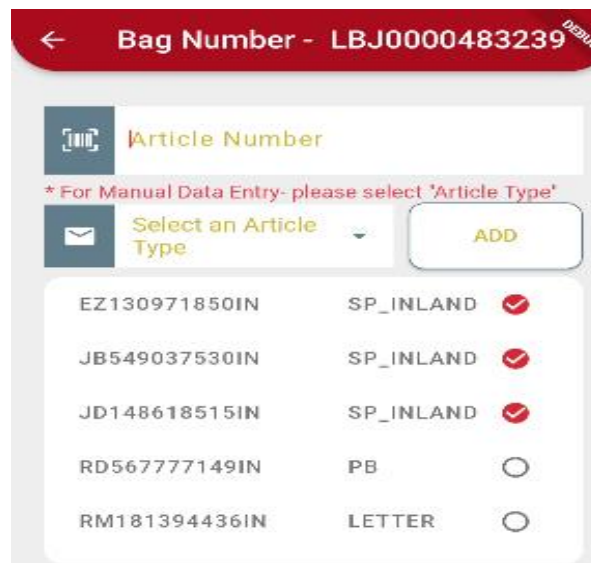
3.3 Bagging services:



Bag Open:-

- Click on barcode icon to scan the Bag Barcode. User need to scan the Bag bar code to get the virtual bag data.

Scanning article Number:



- Click on barcode icon to scan the articles one by one. It shows the no. of articles which are received in bag.

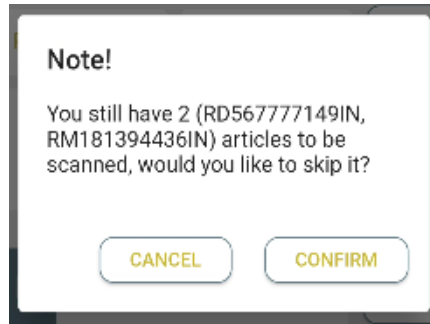
Receiving Inventory/document/cash:

The screenshot shows a mobile application interface for receiving inventory, documents, and cash. It features several sections:

- Inventory Section:** A table with columns for Inventory Name, Price, Total, and an ADD button. The table contains two rows: 'stamp' with a quantity of 25 and a price of ₹5, and 'envelope' with a quantity of 5 and a price of ₹6. Both rows have a red checkmark in the ADD column.
- Document Section:** A section with a Document Name input field and an ADD button. Below the input field, there are two rows: 'test' and 'hshs', both with red checkmarks in the ADD column.
- Cash Section:** A section with a currency symbol (₹) and a text input field containing '3000'. A red dot is visible below the input field.
- SAVE Button:** A button labeled 'SAVE' is located at the bottom of the interface.

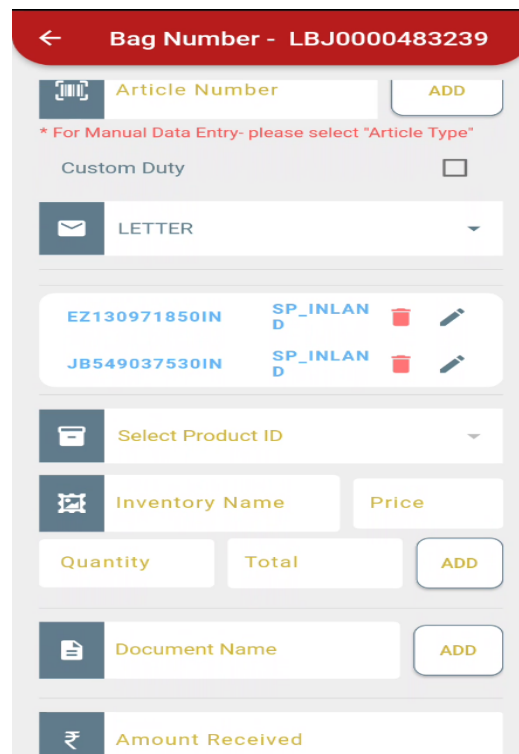
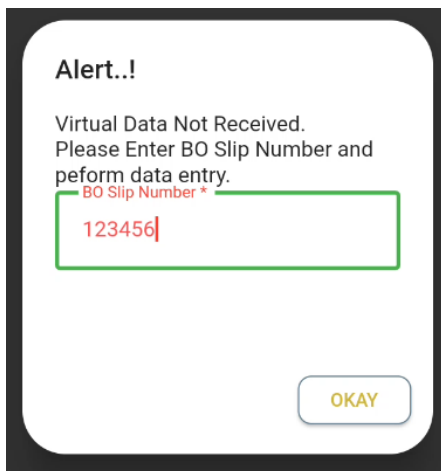
1. User has to verify the details to receive the inventories, documents and Cash invoiced by AO.
2. Select save button to received articles/inventory/ document/cash.

Checking of short article scanning:



- If the number of articles sent physically in bag is less than the number of articles expected by the delivery application, then, the situation is treated as short. User has to select confirm button to skip the short articles.

Bag Details: Data not received virtually



← Bag Number - LBJ0000483239

Article Number ADD

* For Manual Data Entry- please select "Article Type"

Custom Duty

LETTER

EZ130971850IN	SP_INLAN D	<input type="checkbox"/>	<input type="text"/>
JB549037530IN	SP_INLAN D	<input type="checkbox"/>	<input type="text"/>

Select Product ID

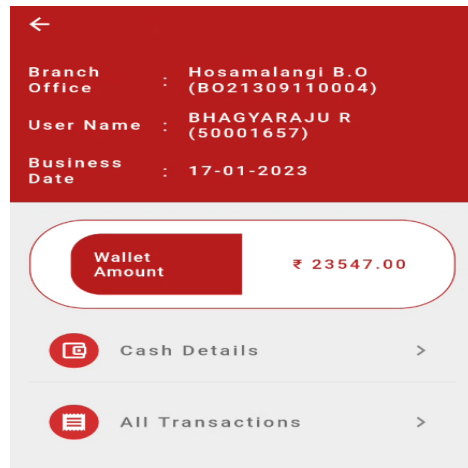
Inventory Name	Price
Quantity	Total

ADD

Document Name ADD

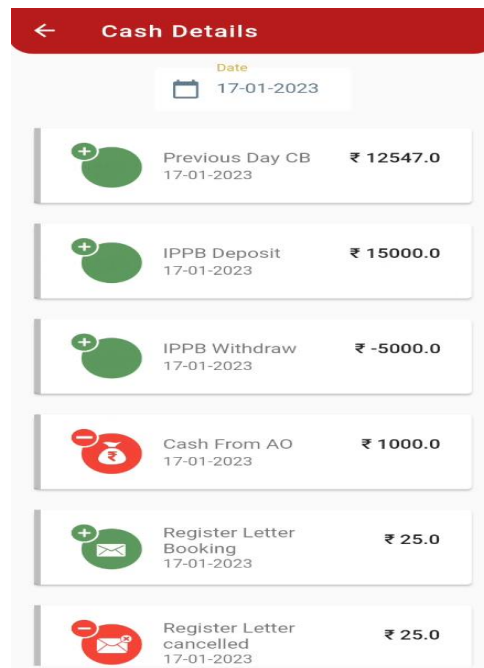
₹ Amount Received

- If virtual data not received, user can receive the bag for making data entry using this option after entering BO Slip No.



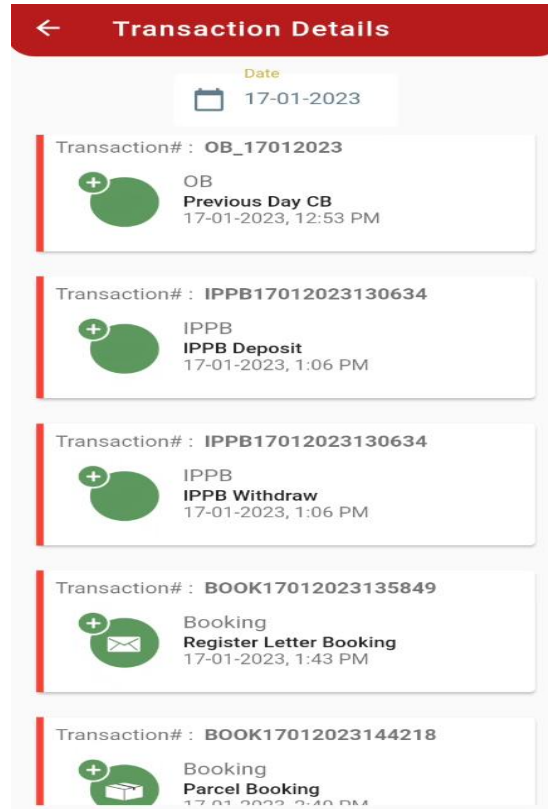
WALLET:

- Cash Wallet option helps the users to check the cash balance of the office at any point of time.



Cash Details (Available in cash Wallet):

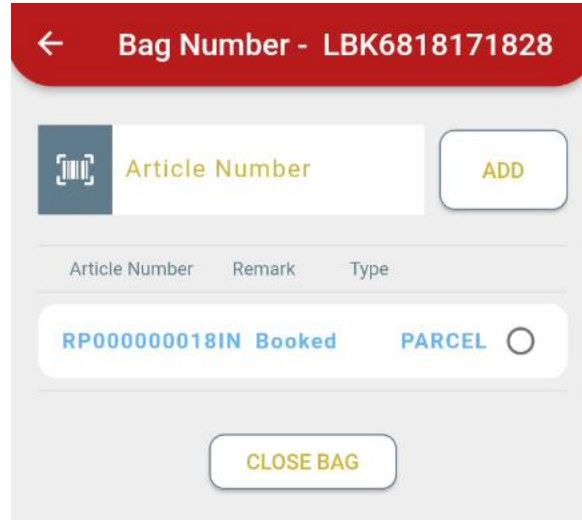
- By clicking the option cash details in cash wallet, the user can check cash transactions done at



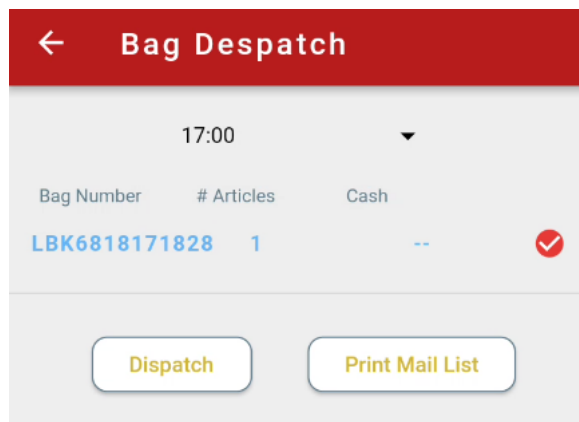
any point of time during the business hours.

Transactions details in cash wallet:

- By clicking the option transaction details in cash wallet , the user can check all transaction details done at any point of time during the business hours



Bag close/dispatch:



- Booked/return Articles will available on screen. User has to scan/ enter for adding into the bag for closing.
- Bag closed containing Article booked, returned, redirected articles from BO can be despatched and mail list can be generated.

← **Bagging Reports**

Bag Open ▾ Date
17-01-2023

Bag Number: LBJ0000483239 Opened Time: 2:55 PM

Articles

Article Number	Article Type
EZ130971850IN	SP_INLAND
EZ130971850IN	SP_INLAND
JB549037530IN	SP_INLAND
JB549037530IN	SP_INLAND

← **Bagging Reports**

Bag Close ▾ Date
17-01-2023

Bag Number: LBK6818171828 Closed Time: 2:55 PM

Articles

Article Number	Article Type
RP000000018IN	PARCEL

Bag reports:

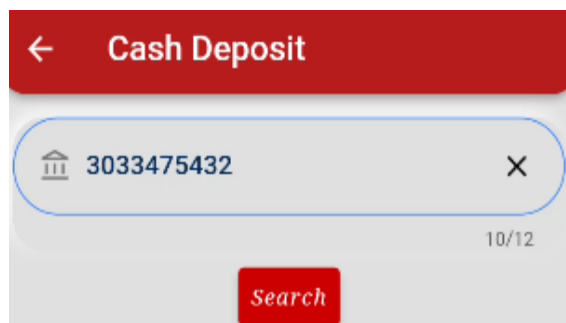
- User can generate Bagging report which contains details of bag open /closed at BO.

4 CBS Home Page



- Home page viewable by BPM after login to the Android DARPAN application is shared below.
- All the functionalities required for CBS operations can be carried out by selecting the respective icon.

4.1 Cash Deposit



- On Clicking the Cash Deposit Icon the below screen will be displayed
- BPM to provide the SB Account number and select search option
- Account details (Account Number, CIF ID, Name and Balance) will be fetched and displayed.
- BPM can verify the details and enter the deposit amount in the respective field and click Initiate Transaction”

← Cash Deposit

3033475432 X

10/12

Search

Account Details

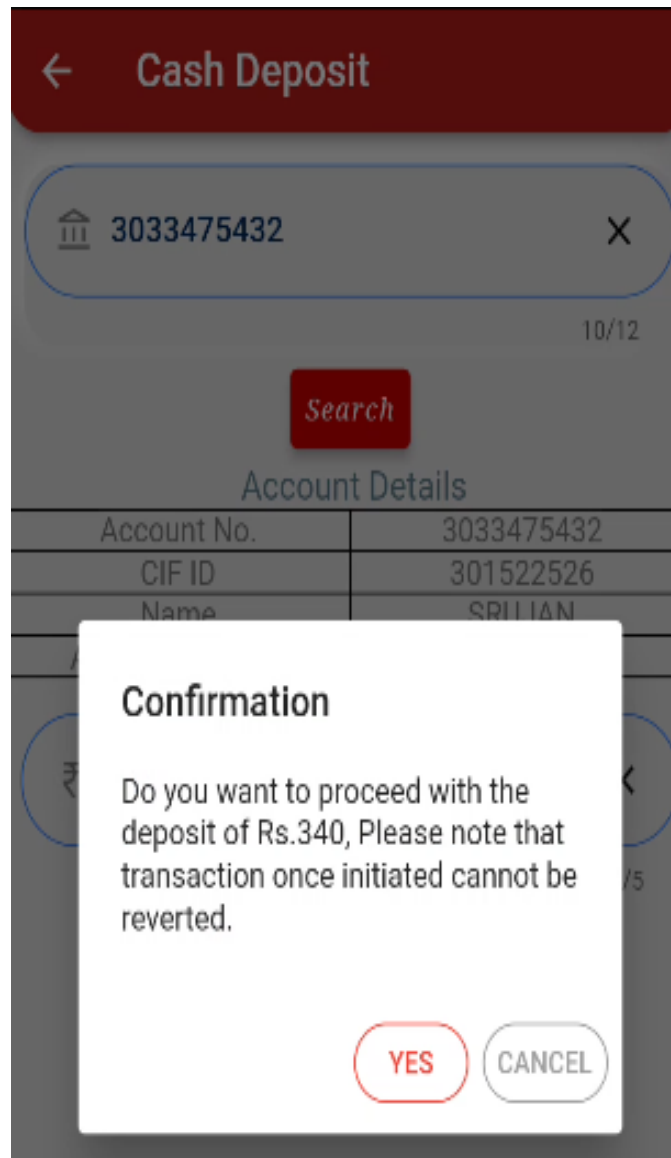
Account No.	3033475432
CIF ID	301522526
Name	SRUJAN
Account Balance	₹ 57660.00

₹ 340 X

3/5

Initiate Transaction

- BPM to check the amount and provide his confirmation for proceeding with transaction.



- Post confirmation transaction will be completed and the details of transactions will be displayed to the BPM.

← **Cash Deposit Amount**

Transaction ID_Date:	S2520254_ 11-01-2023
Account Number:	3033475432
Amount Deposited:	340
Balance After Transaction:	58000.00
Mode of Transaction:	BY CASH
Transaction Processing Date:	11-01-2023
Transaction Processing Time:	12:15 PM
Transaction Type:	Deposit

PRINT **BACK**

- BPM can print the receipt by selecting the print option
- Similar procedures may be followed for RD and SSA accounts.

4.2 Cash Withdrawal

- BPM to select the Cash Withdrawal option for Initiating Cash Withdrawal from SB Account.

- BPM to provide the account number and select search option
- Account details will be fetched and Account number, Name, Account Balance will be displayed

The screenshot shows a mobile application interface for 'Cash Withdrawal'. At the top, there is a red header with a back arrow and the text 'Cash Withdrawal'. Below the header is a search input field containing the account number '3033475432' and a red 'Search' button. The input field has a house icon on the left and an 'X' icon on the right. Below the input field, the text '10/12' is visible.

in screen for BPM validation.

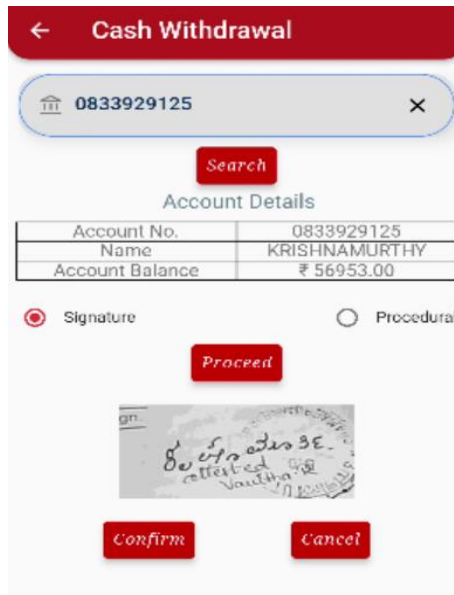
- BPM will have an option to check the signature of the customer captured in Finacle. Signature

The screenshot shows the 'Cash Withdrawal' screen after a search. The account number '3033475432' is still in the input field. Below the input field is a red 'Search' button. Underneath, the text 'Account Details' is displayed. A table shows the following information:

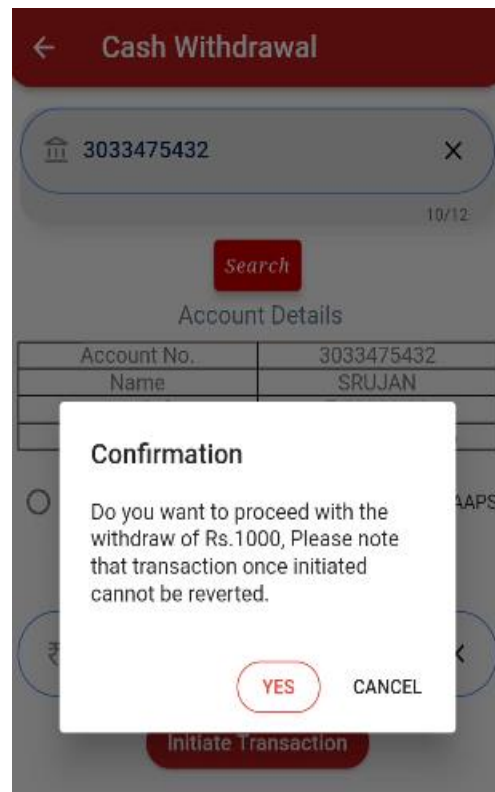
Account No.	3033475432
Name	SRUJAN
Account Balance	₹ 58000.00
Aadhar Number	XXXX XXXX 8556

Below the table, there are three radio button options: 'Signature' (selected), 'Procedural', and 'AAPS'. At the bottom, there is a red 'Proceed' button.

should be validated and confirmation to be provided for proceeding further. If some issue observed in fetching signature, BPM will have an option to select procedural option for proceeding with Withdrawal.



- BPM will provide the Withdrawal amount in the respective field and initiate transaction followed by confirmation in case of Signature/Procedural Mode.



- The BPM can use the Aadhaar Authenticated Payment System also. If the Aadhaar details are not available for the account the mode will not be available in withdrawal screen.

Cash Withdrawal DEBUG

3036798835 ×

Search

Account Details

Account No.	3036798835
Name	RAKESH
Account Balance	₹ 32501.00

Signature
 Procedural
 AAPS

Proceed

- Upon selecting AAPS, BPM to click on Proceed and confirm the mode of withdrawal. In the next screen BPM to type the withdrawal amount and click on Initiate Transaction.

Cash Withdrawal DEBUG

3036798835 ×

Search

Account Details

Account No.	3036798835
Name	RAKESH
Account Balance	₹ 32501.00

Signature
 Procedural
 AAPS

Confirmation

Do you want to authenticate the customer with Aadhar.

Cash Withdrawal DEBUG

3036798835 ×

Search

Account Details

Account No.	3036798835
Name	RAKESH
Account Balance	₹ 32501.00

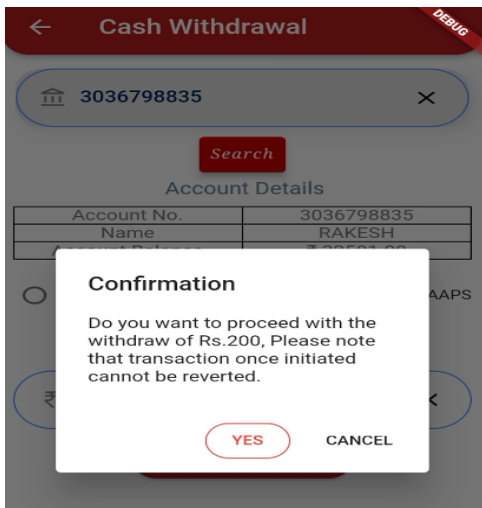
Signature
 Procedural
 AAPS

Proceed

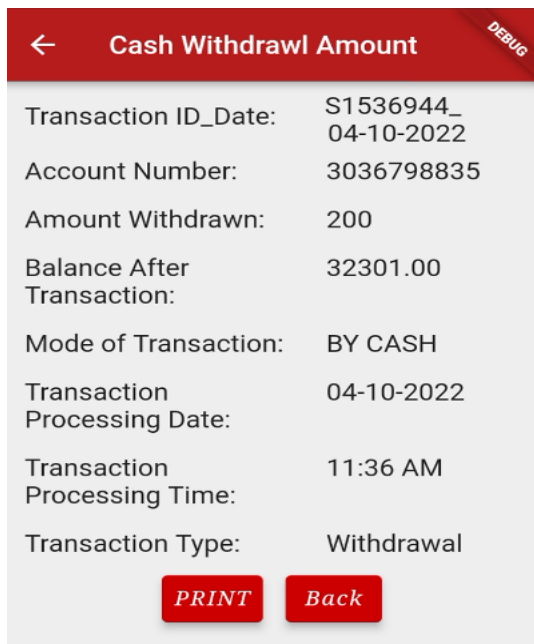
₹ 200 ×

Initiate Transaction

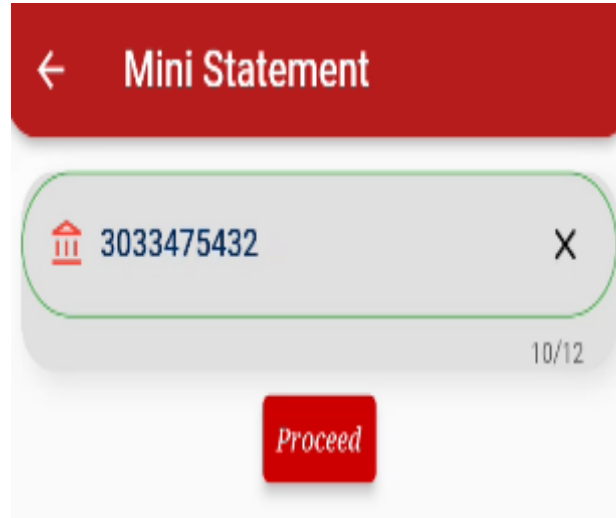
- Upon confirmation of withdrawal amount, the fingerprint of the customer will be captured using the Biometric device. Once the same is validated using the Aadhaar service the withdrawal is allowed.



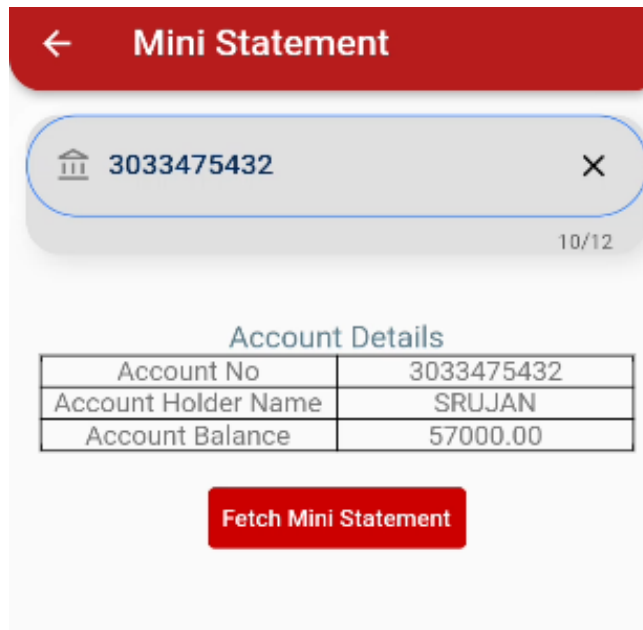
- On successful completion of transaction, details will be displayed in the application with the option to print the transaction status.



4.3 Mini Statement



- BPM can check Mini statement for any SB Account by selecting Mini statement Icon.
- On clicking proceed button – Account details (Account number, Name and Account Balance) will be fetched.



- On clicking Fetch Mini Statement button, details of the last 9 transactions in account will be

←
Mini Statement

🏠
3033475432
✕

10/12

Account Details

Account No	3033475432
Account Holder Name	SRUJAN
Account Balance	57000.00

Account Statement

Sl. No.	DATE	Tran. Particulars	Type	Amount
1	11/01/2023	SDP_BO21309110004_50001657_BY CASH	D	1000.00
2	11/01/2023	SDP_BO21309110004_50001657_BY CASH	C	340.00
3	11/01/2023	SDP_BO21309110004_50001657_BY CASH	C	105.00
4	11/01/2023	SDP_BO21309110004_50001657_BY CASH	C	1.00
5	11/01/2023	SDP_BO21309110004_50001657_BY CASH	D	100.00
6	11/01/2023	SDP_BO21309110004_50001657_BY CASH	C	100.00
7	11/01/2023	SDP_BO21309110004_50001657_BY CASH	D	100.00
8	11/01/2023	SDP_BO21309110004_50001657_BY CASH	D	1.00
9	11/01/2023	SDP_BO21309110004_50001657_BY CASH	C	100.00
10	05/01/2023	SDP_BO21309110004_50001657_BY CASH	D	1.00

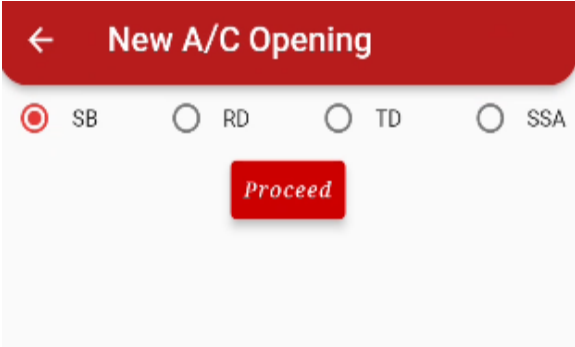
PRINT

BACK

displayed with Option for printing the details.

4.4 Account Opening

- For Opening SB/RD/TD/SSA Accounts in Android app, BPM should select Account Opening

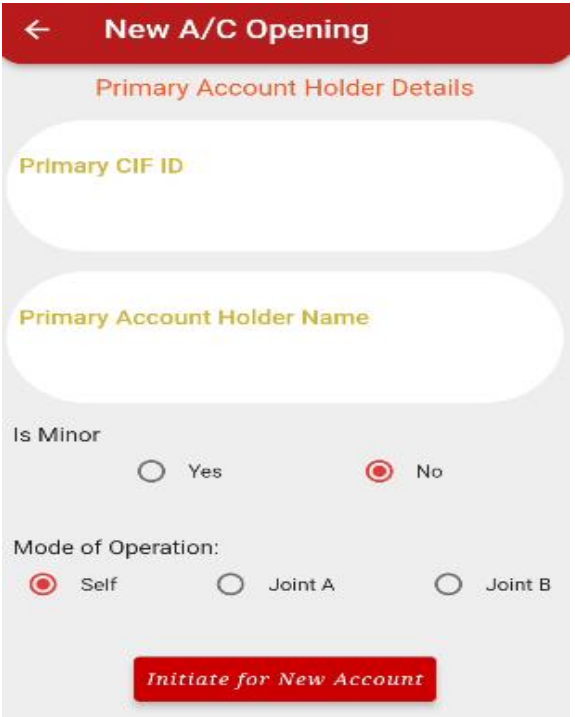


← New A/C Opening

SB RD TD SSA

Proceed

option in the CBS home page.



← New A/C Opening

Primary Account Holder Details

Primary CIF ID

Primary Account Holder Name

Is Minor

Yes No

Mode of Operation:

Self Joint A Joint B

Initiate for New Account

- BPM should select the scheme required as per his requirement and click on proceed Button.

← New Account Opening-...

Account Opening Details

Account Holder Name
SRUJAN

CIF ID
301522526

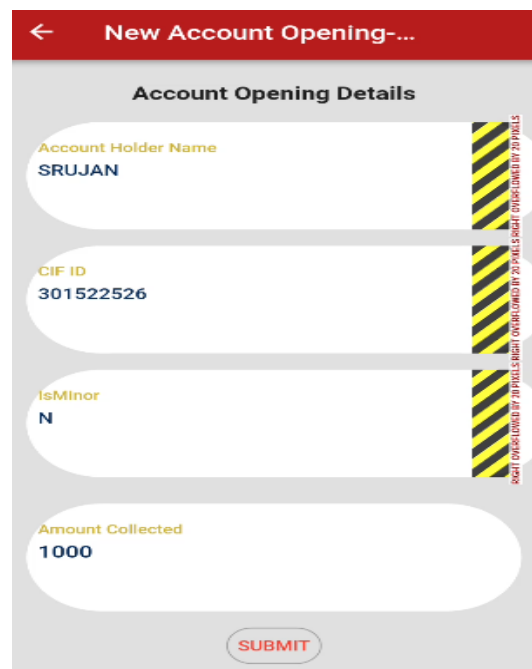
IsMinor
N

SUBMIT

Scanned with CamScanner

- CIF ID, Account holder name, Minor & Mode of Operation to be selected as per requirement before selection of Initiate Account Opening Option.

- Details of the CIF ID will be fetched and on confirmation, BPM will be able to provide the deposit amount details.
- On submission account opening will be completed and the transaction status will be displayed in the application with option to print the same.



The screenshot displays a mobile application interface for a 'New Account Opening' process. The screen has a red header with a back arrow and the title 'New Account Opening-...'. Below the header, the section is titled 'Account Opening Details'. There are four input fields, each with a label and a value: 'Account Holder Name' with 'SRUJAN', 'CIF ID' with '301522526', 'IsMinor' with 'N', and 'Amount Collected' with '1000'. A vertical yellow and black striped bar is on the right side of the first three fields. At the bottom, there is a red 'SUBMIT' button.

Field Label	Value
Account Holder Name	SRUJAN
CIF ID	301522526
IsMinor	N
Amount Collected	1000

← New A/C Transaction Status

Transaction submitted successfully

Transaction ID_Date:	S2522732_ 11-01-2023
Reference Number:	F230111154844857 30KA
Office Account Number:	57144201K1030N
Amount Deposited:	1000
Balance After Transaction:	1000
Mode of Transaction:	cash
Operator ID:	50001657
Transaction Processing Date:	11-01-2023
Transaction Processing Time:	3:49 PM
Transaction Type:	Account Opening
Tenure:	Not Applicable

Capture Photo
Capture Signature

PRINT
BACK

- Using the Same process, Account Opening can be done for all the available other schemes and necessary validations will be handled in the application.

4.5 High value Cash Withdrawal

- BPM can select the High Value Withdrawal Option in the Home page. Account number is provided by BPM and on submission Account details will be fetched.

The screenshot shows a mobile application interface for 'High Value Cash Withdrawal'. At the top, there is a red header with a back arrow and the text 'High Value Cash Withdrawal'. Below the header is a rounded rectangular input field with a green border. Inside the field, there is a red bank icon, the account number '3033475432', and a red 'X' icon on the right. Below the input field, the text '10/12' is visible. At the bottom center, there is a red rounded button labeled 'Submit'.

The screenshot shows the same mobile application interface as above, but with additional content. Below the input field and '10/12' text, the text 'Account Details' is centered. Below this text is a table with two columns and three rows. At the bottom, there are two red rounded buttons: 'New Request' and 'Enquiry'.

Account Details	
Account No.	3033475432
Primary Account Holder	SRUJAN
Account Balance	₹ 57000.00

- BPM can initiate the new request after submitting the amount in the respective field.

Account Details	
Account No.	3033475432
Primary Account Holder	SRUJAN
Account Balance	₹ 57000.00

Enter Amount

20000

Create New Request

- New request was High Value withdrawal (Above Rs.20000) will be created and the details will be shown in the application.

← **High Value Cash Withdrawal**

🏠 3033475432 ✕

10/12

Account Details

Account No.	3033475432
Primary Account Holder	SRUJAN
Account Balance	₹ 57000.00

Enter Amount

20000

Create New Request

REQUEST CREATED SUCCESSFULLY

Account Number	3033475432
Request ID	150485880536
Amount	20000
Transaction Status	Pending

PRINT Back

- Subsequently the BPM can enquire the High value Withdrawal and check the status of the request.

← High Value Cash Withdrawal

3033475432 X

10/12

Account Details

Account No.	3033475432
Primary Account Holder	SRUJAN
Account Balance	₹ 57000.00

New Request Enquiry

← High Value Cash Withdrawal

3033475432 X

10/12

Account Details

Account No.	3033475432
Primary Account Holder	SRUJAN
Account Balance	₹ 57000.00

New Request Enquiry

Pending Requests

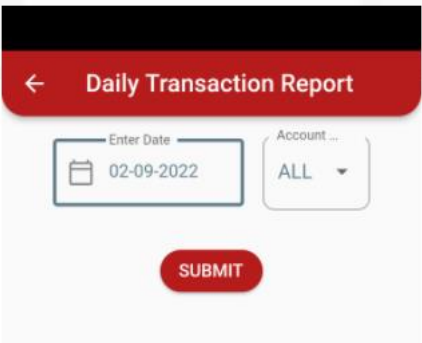
Account Number	3033475432
Request ID	150485880536
Amount	20000
Transaction Status	P

Initiate Transaction Cancel Transaction

- Post approval at Account office, BPM can initiate transaction and transaction details will be displayed with option for printing the details.

4.6 Daily Transaction Report

- BPM can select the Daily transaction Report Option from CBS Home page and view the details



The screenshot shows a mobile application interface for generating a Daily Transaction Report. At the top, there is a red header bar with a white back arrow on the left and the text "Daily Transaction Report" in white. Below the header, there are two input fields: "Enter Date" with a calendar icon and the date "02-09-2022", and "Account..." with a dropdown menu showing "ALL". Below these fields is a red "SUBMIT" button.

of all the transactions carried out for the selected date.

4.7 Transactions Status

- All transactions carried out in this device may be viewed through this option.

← **Daily Transaction Report**

Enter Date Account Type RIGHT OVERFLOW BY 0.3

SUBMIT

Daily Transaction Report

Sl No	Transaction _ID	Account Number	Scheme	Amount	Rem
1	S2519256	3033475432	SBGEN	100	D
2	S2519325	3033475432	SBGEN	100	W
3	S2519332	3033475432	SBGEN	100	D
4	S2519338	3033475432	SBGEN	100	W
5	S2520224	3033475432	SBGEN	105	D
6	S2520254	3033475432	SBGEN	340	D
7	S2520278	3033475432	SBGEN	1000	W

4 Deposits + 3 Withdrawals

Total Deposit Amount= 645

Total Withdrawal Amount= 1200

Transaction Update

Enter Date
11-01-2023

Select Transaction Type:

Transaction Type
Cash Deposit

Fetch

If any transactions are not completed, it will be reflected when fetch button is clicked.

- Also if any item is shown pending here, Day end is not possible.
- After clicking the update button and waiting for a few seconds, we shall receive success message

Transaction Update

Enter Date
11-01-2023

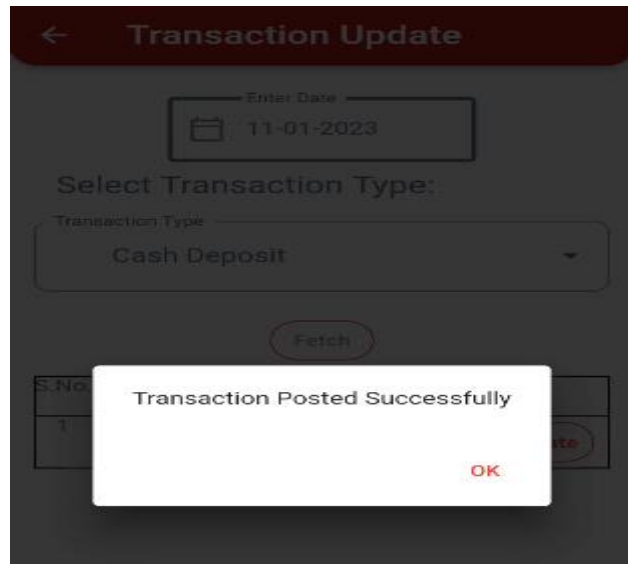
Select Transaction Type:

Transaction Type
Cash Deposit

Fetch

S.No.	A/c No	Type	Amount	Status	Fetch Status
1	3033475432	D	1000	PENDING	Update

as shown below.

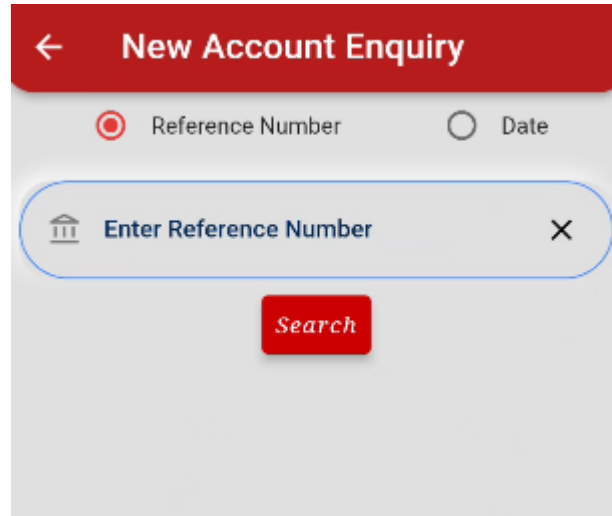


If transaction is not completed, failed messages also will get.

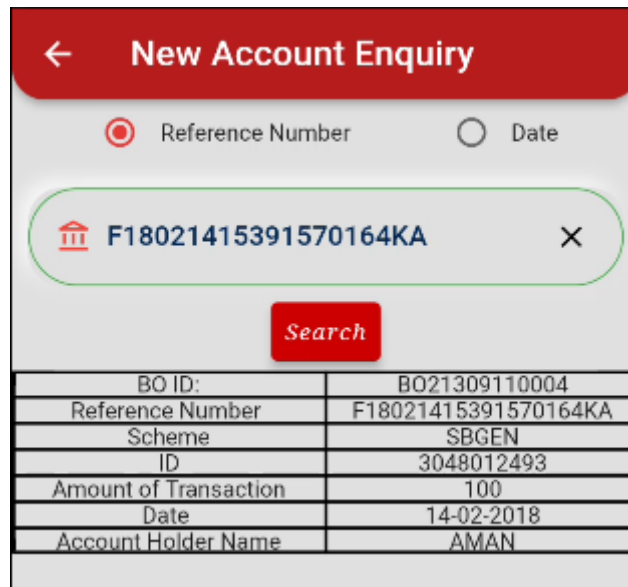
During each transactions, it is advised to see the wallet amount.

4.8 Account Enquiry

- When a new account is opened, we can know the status of the account through this option once the SO is approved the new account opening request.



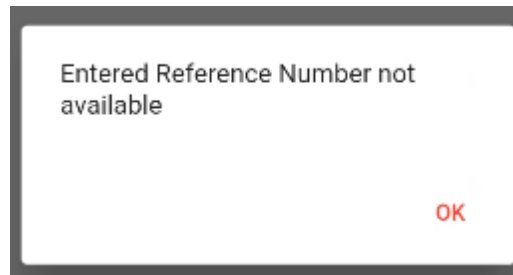
- The reference ID generated during the opening of new account needs to be entered here.



BO ID:	B021309110004
Reference Number	F18021415391570164KA
Scheme	SBGEN
ID	3048012493
Amount of Transaction	100
Date	14-02-2018
Account Holder Name	AMAN

- Details of the newly opened account will be available if the Sub office had accepted the newly opened account.

- Else we may get a message like this.



- Also we can check with the date and all the newly opened account on that particular date will

← **New Account Enquiry**

Reference Number
 Date

Date
14-02-2018

Search

BO ID:	BO21309110004
Reference Number	F18021415391570164KA
Scheme	SBGEN
ID	3048012493
Amount of Transaction	100
Date	14-02-2018
Account Holder Name	AMAN

BO ID:	BO21309110004
Reference Number	F18021415420570164KA
Scheme	TDIP1
ID	3048012516
Amount of Transaction	1000
Date	14-02-2018
Account Holder Name	AMAN

BO ID:	BO21309110004
Reference Number	F18021416093770164KA
Scheme	TDIP2
ID	3048012523
Amount of Transaction	1000
Date	14-02-2018
Account Holder Name	AMAN

BO ID:	BO21309110004
Reference Number	F18021416134670164KA
Scheme	TDIP3
ID	3048012530
Amount of Transaction	1000
Date	14-02-2018
Account Holder Name	AMAN

BO ID:	BO21309110004
Reference Number	F18021416144670164KA
Scheme	TDIP5

appear.

5. POSTAL LIFE INSURANCE

5.1 General & Pre-requisites:

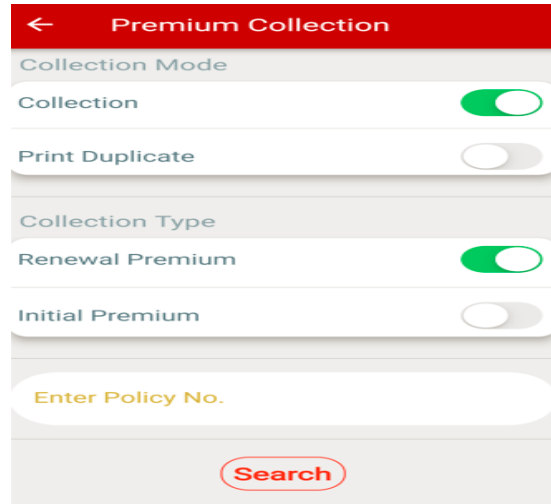
- Office Configuration & Mapping in DARPAN.
- User Mapping in DARPAN.
- Bio-metrics of BPM.



Once the user enters insurance option, this screen will appear.

5.2 PLI / RPLI – Premium Collection:

Renewal Premium:



The screenshot shows a mobile application interface titled "Premium Collection". It features a red header bar with a back arrow and the title. Below the header, there are several settings sections:

- Collection Mode:** A toggle switch for "Collection" is turned on (green).
- Print Duplicate:** A toggle switch is turned off (grey).
- Collection Type:** A toggle switch for "Renewal Premium" is turned on (green).
- Initial Premium:** A toggle switch is turned off (grey).

Below the settings, there is a white rounded rectangular input field with the placeholder text "Enter Policy No.". At the bottom of the screen, there is a red "Search" button.

- Select Collection, renewal premium, enter policy number and click on search
- App validates the Policy No. for which the Premium is to be collected to the Core Solution.
- App will calculate Premium details based on number of installments due and advance premium if any.

- BPM needs to check Policy details.
- Premium is collected based on the Payment Mode i.e., Cash or Cheque.
- If user selects Cheque, he has to enter Cheque no, MICR Code, PO/Bank Name and system does

Payment Confirmation

Amount Payable ₹ 2019.0

Mode of Payment

Cash

Cheque/Demand Draft

Cheque Details

Cheque No. 123

Cheque Date 11-01-2023

POSB

NON-POSB

IFSC Code 123446

Drawee Bank/PO

CONTINUE RESET

Do you want to proceed with payment of 2019.0.

Please note that transaction once initiated cannot be reverted

YES CANCEL

Rebate ₹ 0.0

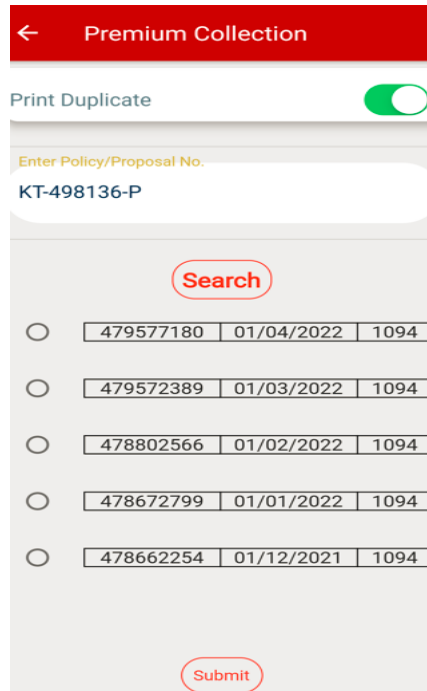
Balance Amount ₹ 0.0

Amount Payable 2019.0

Make Payment

the validations against the details

- Afterwards, data will be updated in the Core Solution.
- Receipt number will be shown on Successful transaction and Receipt can be printed.



The screenshot shows a mobile application interface for 'Premium Collection'. At the top, there is a red header with a back arrow and the text 'Premium Collection'. Below the header, there is a toggle switch for 'Print Duplicate' which is currently turned on. A search input field contains the text 'KT-498136-P'. Below the input field is a red 'Search' button. The search results are displayed as a list of five items, each with a radio button, a policy number, a date, and a receipt number. At the bottom of the screen is a red 'Submit' button.

Policy No.	Date	Receipt No.
479577180	01/04/2022	1094
479572389	01/03/2022	1094
478802566	01/02/2022	1094
478672799	01/01/2022	1094
478662254	01/12/2021	1094

5.3. Printing of Duplicate Receipts:

- BPM can print duplicate Receipts for payment made for Policy or Proposal. After clicking Premium Collection, Select “Print Duplicate” button, enter Policy Number and click on search

- For Printing of Duplicate Receipt, last 5 transactions done for that particular Policy would be shown as above : End user can select any required receipts and proceed for printing duplicate receipts

5.4 Initial Premium Collection:

- BPM is collecting Initial premium for all existing Proposals.

← Duplicate Receipt Print	
Receipt Number	479577180
Policy Holder Name	MAHADEVAPPA. B. V.
Policy Number	KT-498136-P
Receipt Date	01/04/2022
Receipt Time	00:00
Paid From	01/04/2022
Paid Till	30/04/2022
CGST	12.04
SGST	12.04
Total GST	24
Premium Due Amount	1070
Total Amount	1094

- System does the validation for the Proposal Number for which the Premium is to be collected.

Initial Premium collection

Initial Premium

Premium Details

Proposal Number
N-WLA0002579055

Insured Name
Samar Saraswat

Check-In Date
18/07/2022

₹ Total Amount
3104

₹ Enter Amount to be collected

Make Payment

- BPM needs to check Proposal Number, Insured Name and then enter the Premium Amount.
- BPM type the Amount to be paid.

- Premium may be collected either cash or cheque.

← Payment Confirmation

Payment Details

Amount Payable ₹ 3104

Mode of Payment

Cash

Cheque/Demand Draft

CONTINUE RESET

- Receipt number will be shown on successful transaction.

Do you want to proceed with payment of 3104.

Please note that transaction once initiated cannot be reverted

YES CANCEL

- Print the Receipt.

5.5 Quote:

- Pl click on Quote.
- Several Quote options like Surrender / Revival / Loan / New Business are available in the drop down.

- Select the appropriate options required, enter the policy number and click on next.

The image displays two sequential screenshots of a mobile application interface for a 'Quote' screen. The top screenshot shows the initial form with the following fields: 'Product Name' (set to 'Surrender'), 'Policy No.' (empty), and 'Date' (set to '11-01-2023'). A red 'Next' button is located below the 'Date' field. The bottom screenshot shows the 'Product Name' dropdown menu open, listing three options: 'Surrender', 'Loan', and 'Revival/Reinstatement'. The 'Date' field remains '11-01-2023', and the 'Next' button is still visible at the bottom.

- The policy details will be shown after entering policy number.
- Click on “GET QUOTE” button, the following screen will appear.

The screenshot displays a mobile application interface for 'Policy Details'. At the top, there is a red header bar with a back arrow and the text 'Policy Details'. Below this, several white rounded rectangular boxes contain the following information:

- Policy Number:** 0000001191286
- Installment Amount(Excl. Tax):** 715
- Policy Status:** AP
- Insured:** ROJA P
- CustomerID:** 56127486
- Product Name:** Santosh
- Issue Date:** 03-06-2017
- Premium Paid till:** 31-12-2022

Below these details, there are two more white rounded rectangular boxes:

- Premium Paid till:** 31-12-2022
- Duplicate Policy Bond Issued:** No

At the bottom of the screen, there are two buttons: a red button with white text labeled 'GET QUOTE' and a blue button with white text labeled 'RESET'.

Surrender Quote

Policy Number: 0000001191286

Policy Holder Name: ROJA P

Paidup Value: 46527.78

Approx Bonus: 13213.89

Paidup Value + Bonus: 59741.67

Surrender Factor: .736

Gross Surrender Amount: 43251.0

Excess: -719.0

O/S Loan Principal: 0.0

O/S Loan Interest: 0.0

Surrender Charges: 0.0

Total Bonus: 13213.89

Paidup Value: 46527.78

Net Surrender Amount: 43251.0

Loan Eligibility: 39500.0

Get Quote

PRINT

RESET

- Click on Print button to take print out and hand over to customer.
- Click on Reset button to get quote for other services.

5.5.1 New Business Quotes:

- Select 'New Business Quote' option.
- Select PLI / RPLI option

The screenshot shows a mobile application interface for 'New Business Quotes'. The form includes the following elements:

- Gender Selection:** Two toggle switches for 'Male' (checked) and 'Female' (unchecked).
- Policy Type Selection:** Two toggle switches for 'PLI' (checked) and 'RPLI' (unchecked).
- Insurant DOB:** An empty text input field.
- Product Name:** A dropdown menu currently showing 'Santosh'.
- Sum Assured:** An empty text input field.
- Age at Maturity:** A radio button group with options 35, 40, 45, 50, and 55. The 35 option is selected.
- Action Buttons:** Two red buttons at the bottom: 'Get Quote' and 'Re-Calculate'.

- BPM required to enter the details.
- Based on Age at Maturity / Premium Ceasing Age / Policy Term premium will be calculated.
- Click on the “Get Quote” button will navigate the BPM to the quote results screen.

← New Business Quote

Quote Generation - PLI QUOTE
Santosh

Sum Assured
200000

Age at maturity
45

Monthly Quote ₹ 1,670.00	Quarterly Quote ₹ 4,998.00
Half-Yearly Quote ₹ 9,872.00	Annually Quote ₹ 19,436.00

Print Continue

- Quotes for the selected Product along with various frequencies will be generated & displayed.
- After clicking “Continue” user can generate ‘New Business Quote’.
- By clicking “Recalculate” button user can generate another new quote.
- By clicking “Print” button BPM can print the quote generated & hand over to the Customer.

5.6 New proposal indexing:

- Select 'Proposal Indexing' option.
- BPM needs to select Product details in 'Product selection' screen.

← New Business Quotes

Male Female

PLI RPLI

Insurant DOR

GramSuraksha

GramSuvidha

GramSantosh

GramPriya

GramSumangal

RuralChildrenPolicy

35 40 45 50 55

Get Quote Re-Calculate

← New Proposal Indexing

Product Type

PLI RPLI

Product Name
Santosh

Proposal Date 01/09/2022	Declaration Date 01/09/2022
AppIn Receipt Date 01/09/2022	Indexing Date 01/09/2022

Office Details

PO Code
BO21309110010

Opportunity ID

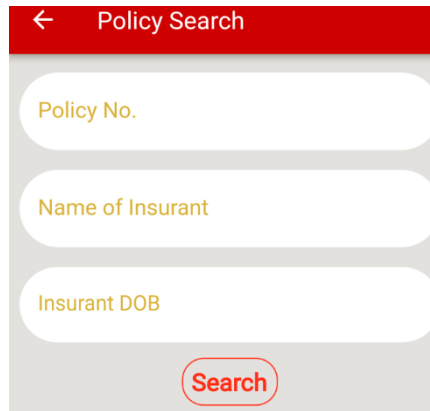
Issue Circle
KARNATAKA CIRCLE

- BPM needs to enter 'Date', 'Gender', 'DOB' and other details in 'Date and Issue Post office' and Click 'Next' button.
- BPM needs to enter SA, Premium Ceasing Age / Maturity Age according to the selected Product and make payment either as Cash / Cheque.

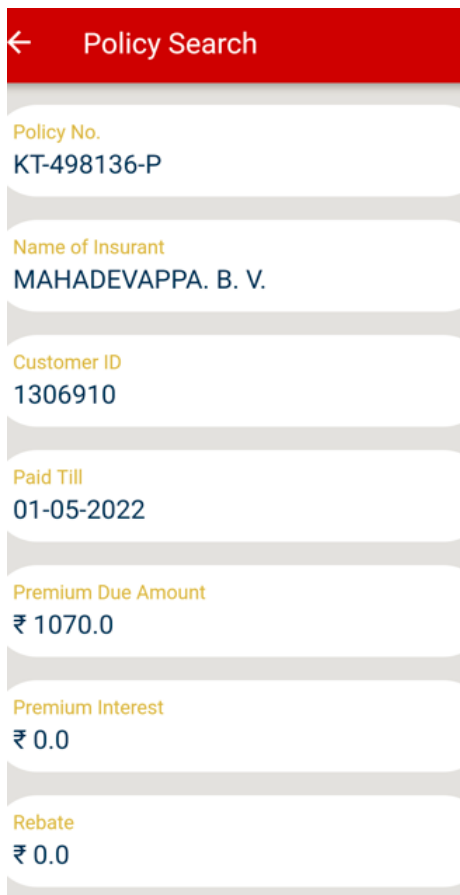
- Enter all the fields and click on Submit. It will generate a Unique Proposal Number.
- BPM can Print the details & hand over to the Customer.

5.7 Policy Search:

- Select 'Policy Search' option.
- Enter 'Policy No', 'Name' and 'DOB' and proceed further by clicking 'Search' button.
- BPM can view the Policy Summary details.



A screenshot of a mobile application interface for 'Policy Search'. It features a red header with a back arrow and the text 'Policy Search'. Below the header are three white input fields with rounded corners, each containing a label in orange text: 'Policy No.', 'Name of Insurant', and 'Insurant DOB'. At the bottom center, there is a red button with the word 'Search' in white text.



A screenshot of the 'Policy Search' results screen. The red header contains a back arrow and 'Policy Search'. The screen displays the following details in orange text labels and black text values:

- Policy No. KT-498136-P
- Name of Insurant MAHADEVAPPA. B. V.
- Customer ID 1306910
- Paid Till 01-05-2022
- Premium Due Amount ₹ 1070.0
- Premium Interest ₹ 0.0
- Rebate ₹ 0.0



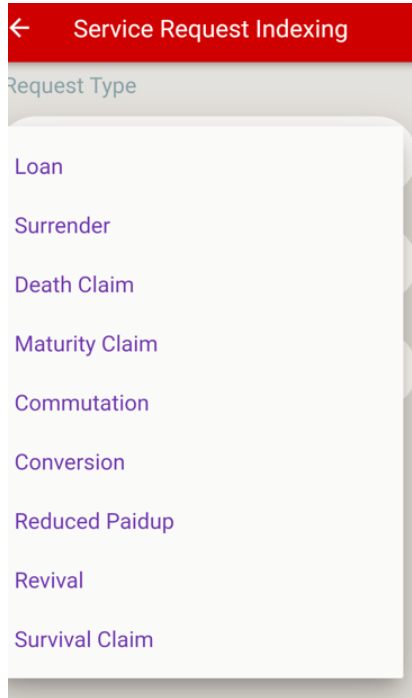
A screenshot of the 'Policy Search' results screen showing tax and total amounts. The red header contains a back arrow and 'Policy Search'. The screen displays the following details in orange text labels and black text values:

- 01-05-2022
- Premium Due Amount ₹ 1070.0
- Premium Interest ₹ 0.0
- Rebate ₹ 0.0
- CGST ₹ 12.0
- SGST ₹ 12.0
- Total GST ₹ 24
- Total Amount ₹ 1070

At the bottom center, there is a red button with the word 'Reset' in white text.

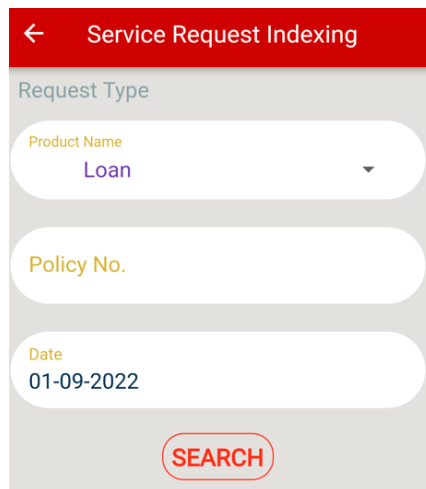
5.8 Service Request Indexing:

- Select type of service request.



The screenshot shows a mobile application interface for 'Service Request Indexing'. At the top, there is a red header bar with a back arrow and the text 'Service Request Indexing'. Below the header, the text 'Request Type' is displayed. A dropdown menu is open, showing a list of service request types: Loan, Surrender, Death Claim, Maturity Claim, Commutation, Conversion, Reduced Paidup, Revival, and Survival Claim. Each item is listed in a purple font.

- Enter Policy Number.
- Policy details will be displayed.



The screenshot shows the same 'Service Request Indexing' screen. The 'Request Type' dropdown is now set to 'Loan'. Below it, there are three input fields: 'Product Name' (with 'Loan' selected), 'Policy No.', and 'Date' (with '01-09-2022' entered). At the bottom of the form, there is a red 'SEARCH' button.

- BPM needs to enter the required details.
- Post successful completion, Solution shall generate a Service Request ID for future reference.
- BPM can print Transaction Receipt & hand over to Insurant.

← Indexing Screen

Loan

Policy No. 0000005057457

Insured RAKESH C N

Customer ID 74561620

Premium Paid Till 2022-08-31

Policy Status AP

Issue Date 2021-07-12

Installment Amount(Excl. Tax) 1583

ProductName Santosh

← Indexing Screen

RAKESH C N

Customer ID 74561620

Premium Paid Till 2022-08-31

Policy Status AP

Issue Date 2021-07-12

Installment Amount(Excl. Tax) 1583

ProductName Santosh

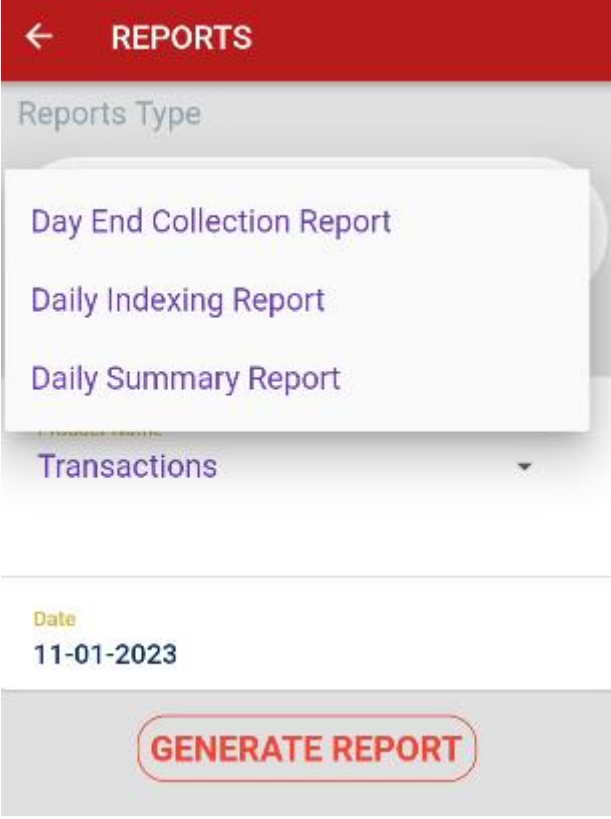
Passbook Paid To Date 01-09-22

SUBMIT CANCEL

5.9 Reports:

- By using this option, BPM can generate various Reports during middle or end of day.
- BPM can select “Reports” which will show the list of Transactions respectively for the selected Date.
- Select “Reports” Menu.

- Below 3 Reports are available :
 - Day End Collection Report
 - Daily Indexing Report
 - Daily Collection Summary Report



The screenshot shows a mobile application interface for generating reports. At the top, there is a red header bar with a white back arrow and the text "REPORTS". Below the header, the text "Reports Type" is displayed in a light gray font. A white dropdown menu is open, showing three options: "Day End Collection Report", "Daily Indexing Report", and "Daily Summary Report". Below the dropdown, the text "Transactions" is displayed in a light gray font, followed by a small downward arrow. At the bottom of the screen, the text "Date" is displayed in a light gray font, followed by the date "11-01-2023". A red button with the text "GENERATE REPORT" is located at the bottom of the screen.

- Select “Day End Collection” Report to generate report of Policies for which Premium are collected.

- Day end collection report will be generated as shown below.

No.	Trans date	Pol/Prop No.	Amt.	Type	Stat
1	11-01-2023	N-WLA0002579055	3104	PLI	PEND

Total Deposit Amount: ₹0

Total Successful Transactions: 0

Total Pending Transactions: 1

Total Failed Transactions: 0

- Select “Daily Indexing” Report to generate Report of Policies for which Service Indexing requests are raised.

The screenshot shows a mobile application interface for generating reports. At the top, there is a red header with a back arrow and the word "REPORTS". Below this, the "Reports Type" section contains a dropdown menu labeled "Product Name" with "Daily Indexing Report" selected. The "Transaction Type" section contains a list with three options: "Transactions", "PLI", and "RPLI", with "Transactions" selected. At the bottom of the screen is a red button with the text "GENERATE REPORT".

- Select “Daily Summary” Report to generate Summary of Daily Collection for PLI / RPLI Policies.

The screenshot shows a mobile application interface for generating reports. At the top, there is a red header with a back arrow and the word "REPORTS". Below this, the "Reports Type" section contains a dropdown menu labeled "Product Name" with "Daily Summary Report" selected. The "Transaction Type" section contains a list with two options: "PLI" and "RPLI", with "PLI" selected. Below the list is a date field containing "01-09-2022". At the bottom of the screen is a red button with the text "GENERATE REPORT".



Daily Summary Report

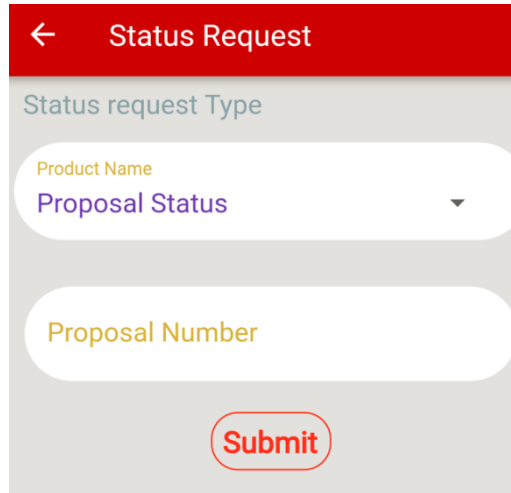
Daily Summary Report- PLI

Receipts	CASH	CHEQUE
First Year	3104.0	0.0
Second Year	0.0	0.0
Renewal Premium		
Revival Premium		
Default realized		
First Year CGST Collected	0.0	0.0
First Year SGST Collected	0.0	0.0
First Year UTGST Collected		
Renewal Year CGST	0.0	0.0
Renewal Year SGST	0.0	0.0
Renewal Year UTGST		
Total	3104	0
Rebate Allowed		

PRINT

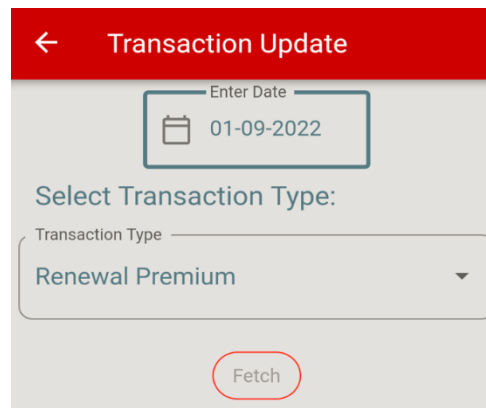
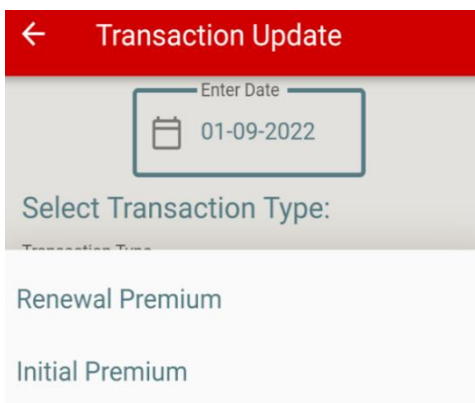
5.10 To check the Status of Service Request:

- Select 'Status Request'.
- Select Request type like "Proposal Status / Claim Status".
- **Proposal Status:** Select Request type as "Proposal Status", fill in the details and click on 'Submit and view the status.
- **Claim Status:** Select Request type as "Claim Status", enter the Policy Number which is having a claim request and click on Submit and view the Claim Status of the entered Policy Number.



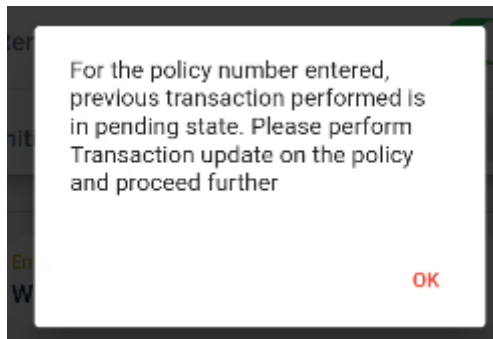
5.11 Transaction update:

- Whenever transaction go into pending status, use the "Transaction Update" option after waiting for 5 minutes from the initial transaction.

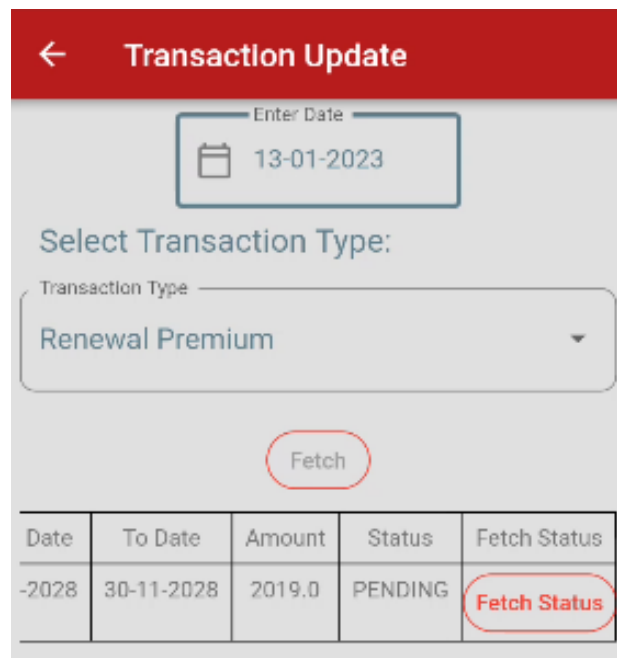


- "Transaction update" can be done for Initial Premium and Renewal Premium transactions.

- If user tries to collect renewal premium for pending policy, then APP will throw an error as shown below.



- User has to click on “Fetch Status” for each transaction one by one to view the status of the transaction.

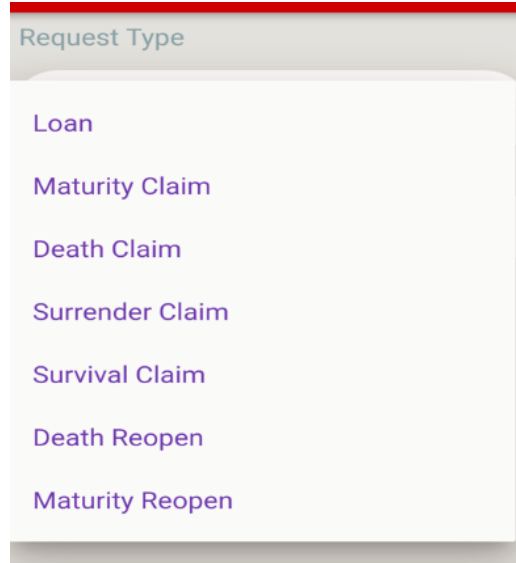


The screenshot shows the "Transaction Update" screen. At the top, there is a red header with a back arrow and the text "Transaction Update". Below the header, there is a date selection field labeled "Enter Date" with a calendar icon and the date "13-01-2023". Underneath, it says "Select Transaction Type:" followed by a dropdown menu labeled "Transaction Type" with "Renewal Premium" selected. A red "Fetch" button is centered below the dropdown. At the bottom, there is a table with the following data:

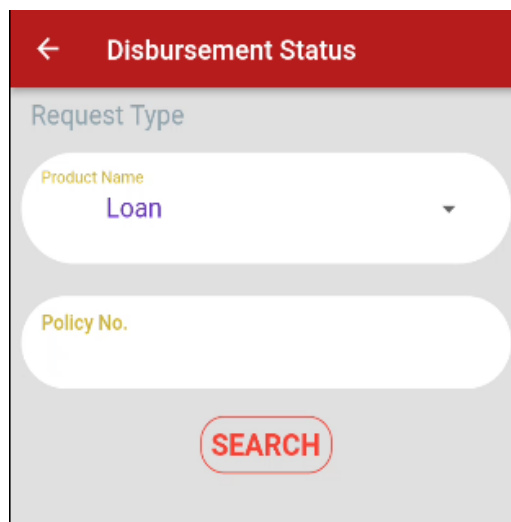
Date	To Date	Amount	Status	Fetch Status
-2028	30-11-2028	2019.0	PENDING	Fetch Status

5.12 To check Disbursement Status:

- BPM can check status of any Disbursement Requests like Maturity claim, Death claim, Loan etc., in the PLI App.
- Click on “Disbursement Status” option.
- Various types of Service Requests are shown above.



- Enter the Policy No. and click on Search Button.



- App will fetch the data / details from Core Solution & display in the App.
- Information to the entered policy number will be shown and also the disbursement status will be shown accordingly.

Request Type

Product Name
Loan

Policy No.
TN-556278-P

SEARCH

Payee Name	Disbursed Amount	Disbursed Date	Disbursed Voucher No
MANGIPUDI POORNA CHANDRA RAO	37000.0	2017-03-17	1699335

Reset

6. Do's & Don'ts

6.1 Do's

- Begin the day in APP before making any transactions
- Note down the Wallet amount soon after Day begin.
- Make sure the BO name, BO id, BPM name are all correct before proceeding any transaction.
- Ensure that Mobile /Tab and Bluetooth printer is having enough battery charge and both are connected.
- Make sure that printer is on and connected with required permissions (first time) before taking any printouts.
- Note down the wallet amount before and after opening of the bag.
- Ensure the checklist provided by Account office has been followed thoroughly.
- Make sure the BODA is generated after Day end and printed on the same day of transactions.
- Flow to be followed like this: Day Begin -> Perform All Operation -> Check Wallet Balance and all Transaction Reports ->Day End -> IPPB Data Entry -> BODA Generation -> Bag Close -> Bag Despatch
- All the account offices are requested to tally the BODA received from BO with DTR in SAP. If any discrepancy is observed, please share the same to all concerned for resolution.

6.2 Don'ts

- User should not handle the mobile device roughly.
- If the BO name, BO id and BPM name are mismatching, user should not do any transaction,
- User should not do day end in the next day for the previous day transactions/work.
- User should not do day end /BODA generation when there is any mismatch in wallet. Report the issue.