STANDARD OPERATING PROCEDURE
FOR
UNIFIED DARPAN ANDROID APP

Department of Posts
Ministry of Communications
Government of India

DARPAN

Contents

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
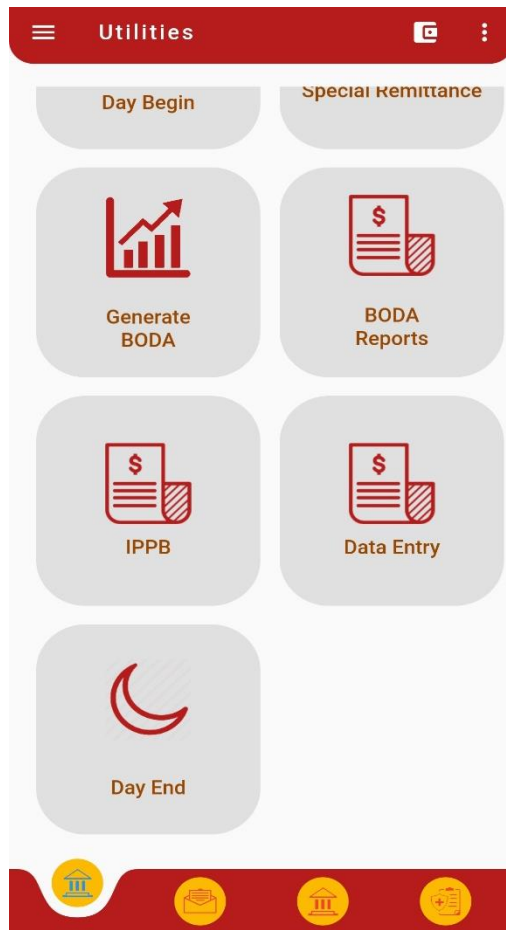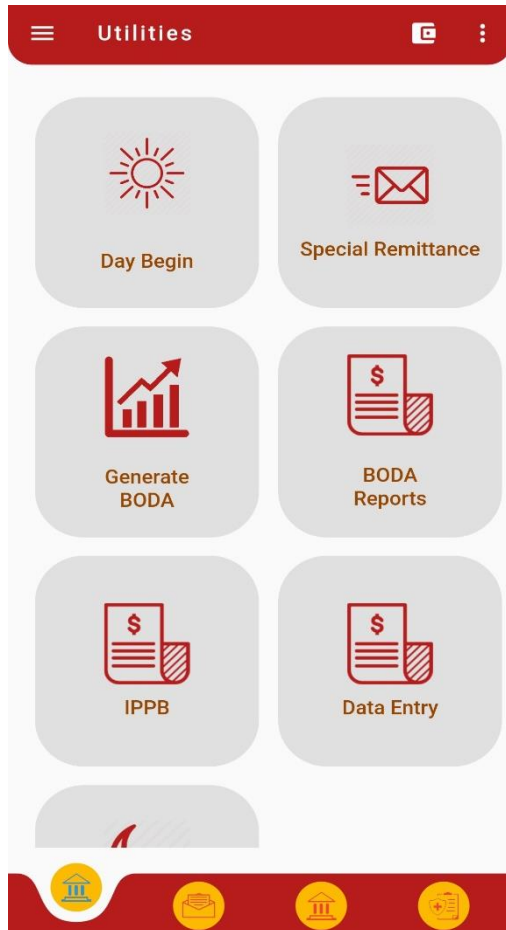
2.1 **Day Begin**

> ➢ Day Begin is required for accessing DARPAN Application Modules before making any operations.
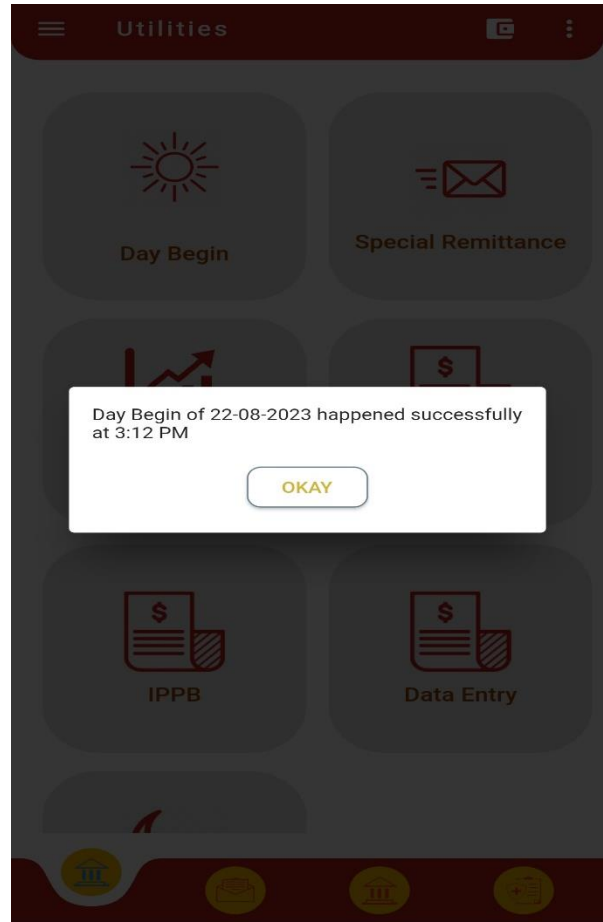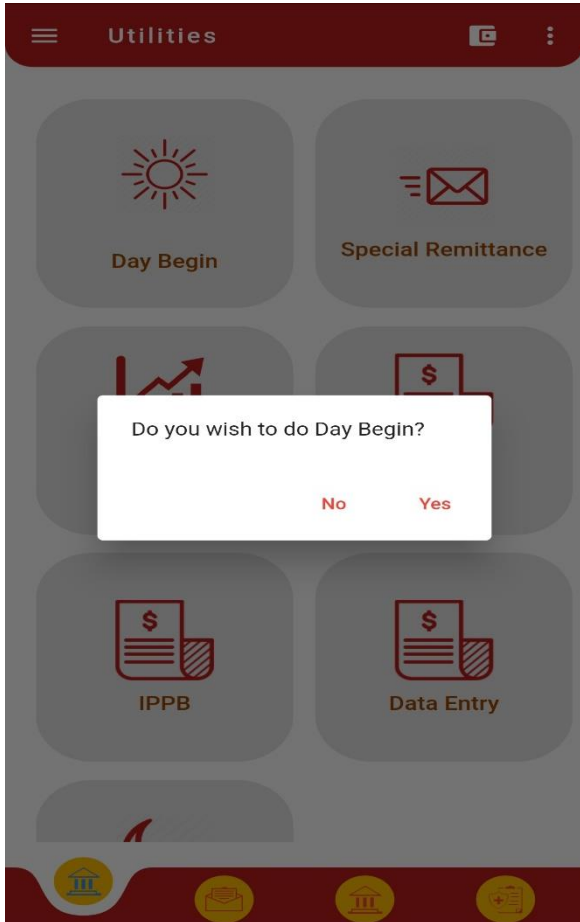
Step 1: Click on the Day Begin icon. Click on "Yes" link.

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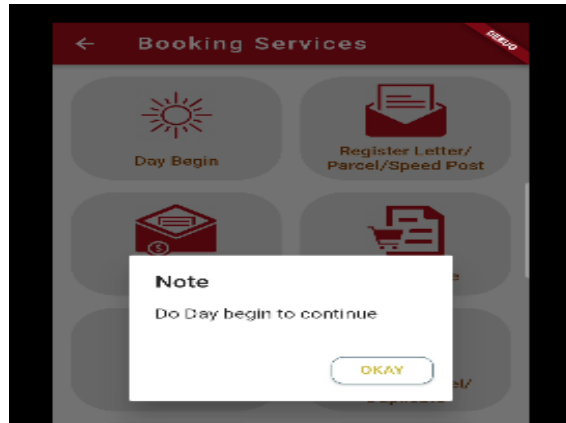
➢ Without day begin , if uses tries to book any accountable articles one error will pop up **" Do Day begin to continue"**

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.

Special Remittance Request
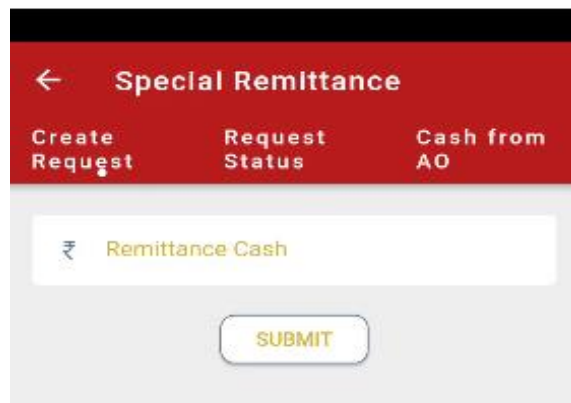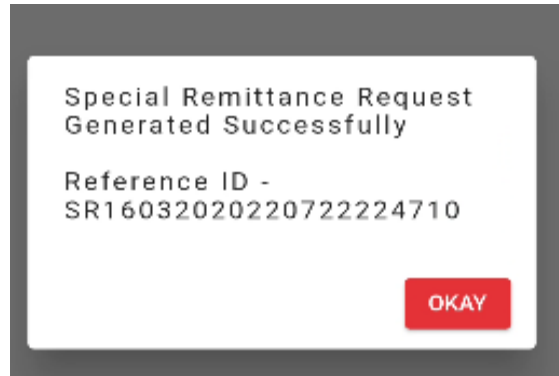Generated Successfully

Reference ID -
SR160320202207222224710

OKAY

2) Special Remittance Status:

← **Special Remittance**

Create Request   **Request Status**

ID	Amount Requested
SR160320202207222246141	260000
SR160320202207222247102	28000

← **Special Remittance**

Create Request   **Request Status**

Acknowledgement Received On	Status
22072022	Acknowledgement Pending
22072022	Acknowledgement Pending
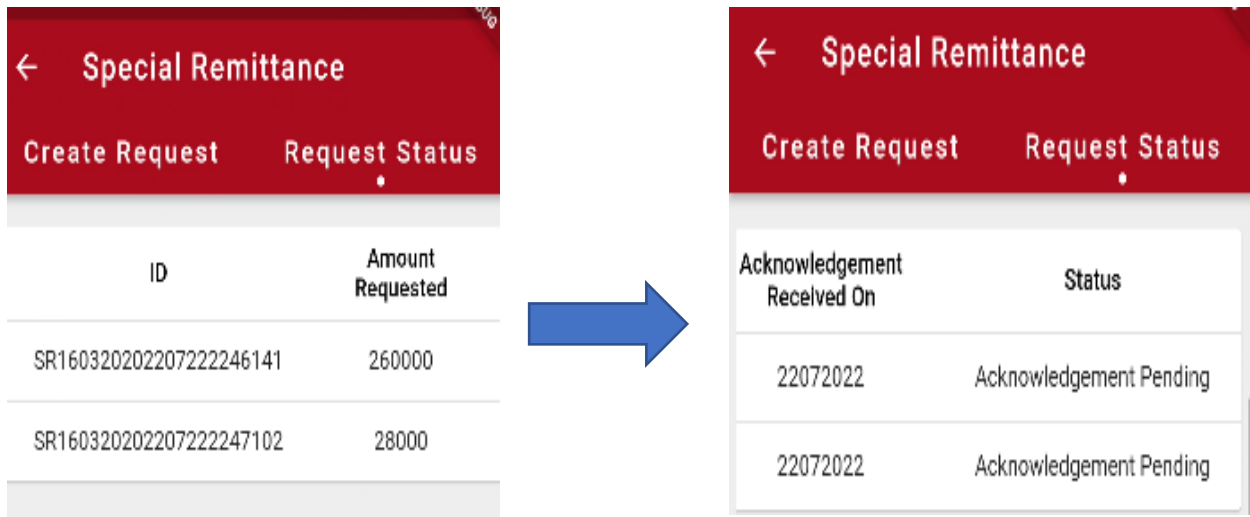
Step 6: Click on the 'REQUEST STATUS' tab to check the status of the request.

> ➢ 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.

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   :   ₹   20000.00

Cash to AO   :   ₹   108929   ⊗

📄 Liability Reason

              Weight

Cash Bag Weight   :   ⚖ 245   ⊗

Cash Indent from AO for Liability   :   ₹ Cash

Documents to AO
all docs
📄 |

CANCEL   CONFIRM

BODA Slip 🖨 📋

INDIA POST
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BO21309110004170170012023

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

RECEIPTS

Opening Balance Amount	:	₹ 12547.00
IPPB Deposits	:	5
Value	:	₹ 15000
Bag Cash	:	₹ 1000 ⌄
TOTAL RECEIPTS	:	₹ 16000.0

PAYMENTS

Cash to AO	:	₹ 9000
IPPB Withdraw	:	10
Value	:	₹ 5000
TOTAL PAYMENTS	:	₹ 14000.0

CASH BALANCE

Cash & Currency Notes Amount	:	₹ 14547.00

2.4 **BODA Reports**
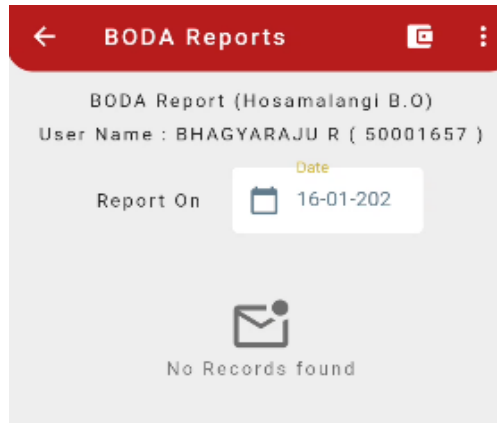
➢ Using this option User can generate BODA for old dates for Max last 15 days.

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.

> ➢ 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, CSCand 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.
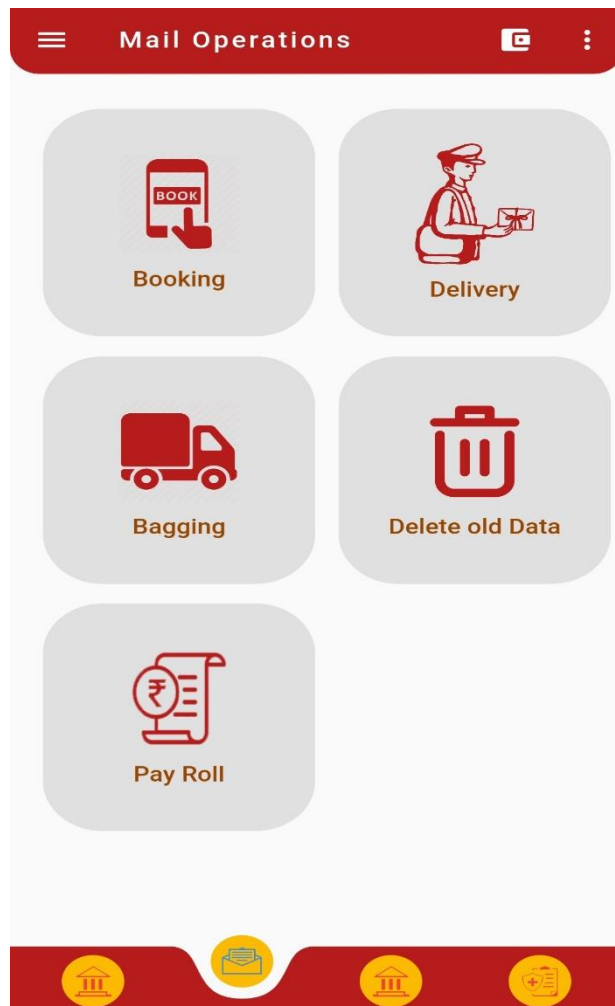
➢ CBS and PLI pending transactions.

➢ IPPB data entry.

➢ Accountable mail articles returns pending.

➢ Booking of VPMO for VP delivered articles.

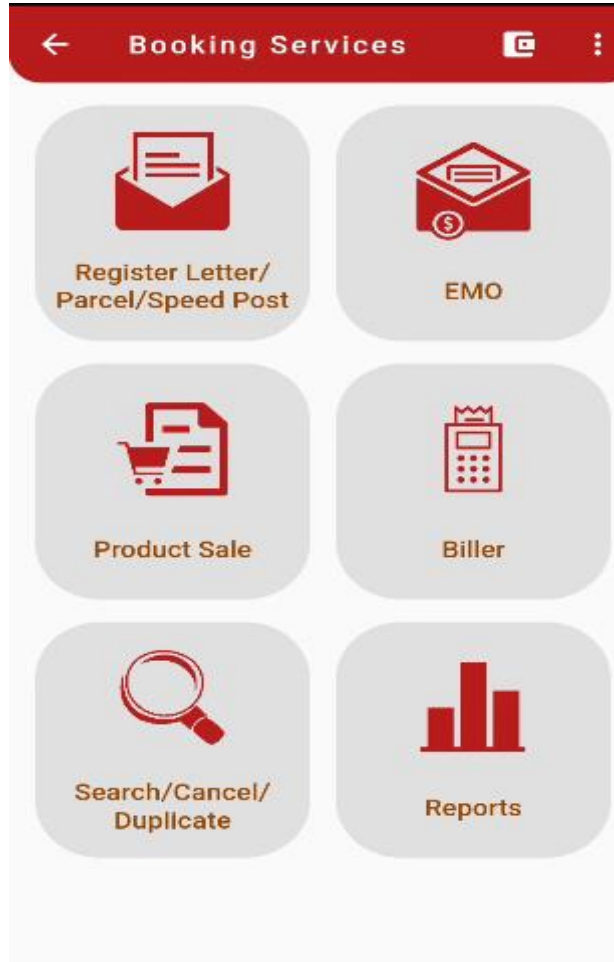Day End of 16-01-2023 happened
successfully at 4:36 PM

[OKAY]
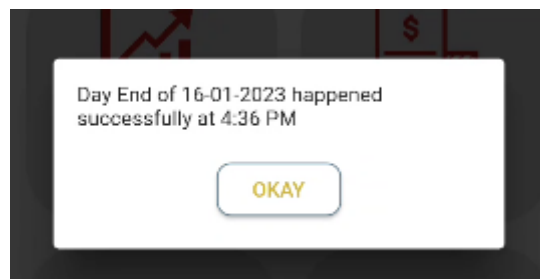
3. Mail Operations:

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 **Biller:** User can book third party bills using this module.

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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

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).
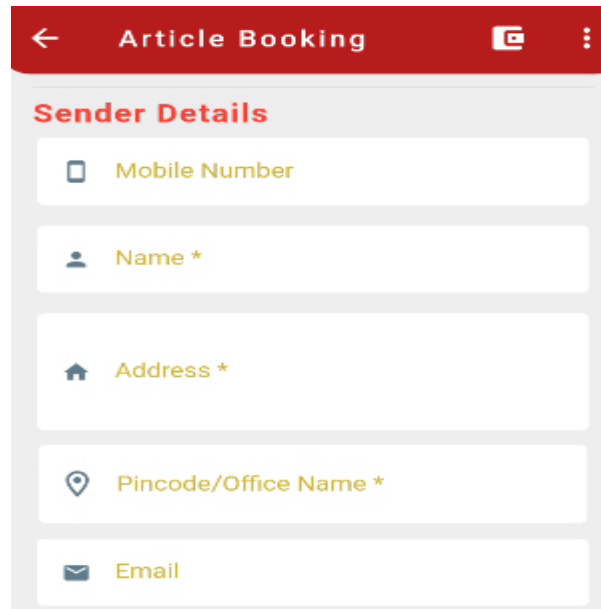
Acknowledgement: For getting acknowledgement

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:

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:

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:

Step 19: User can check the details in booking preview.
Step 20: Select option "Book" or "cancel".

Booking Confirmation:

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.

Information

SMS Sent Successfully!
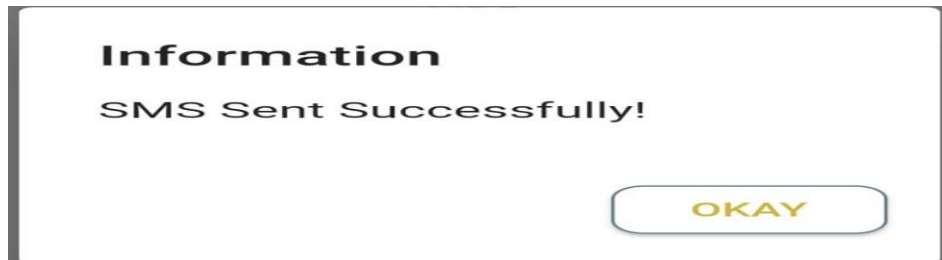
OKAY

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:

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:

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

Step13: 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	Commission Amount
₹ 100	₹ 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**

CANCEL   BOOK

Step 16: User can check the details in booking preview.
Step 17: Select option "Book" or "cancel".

Confirmation

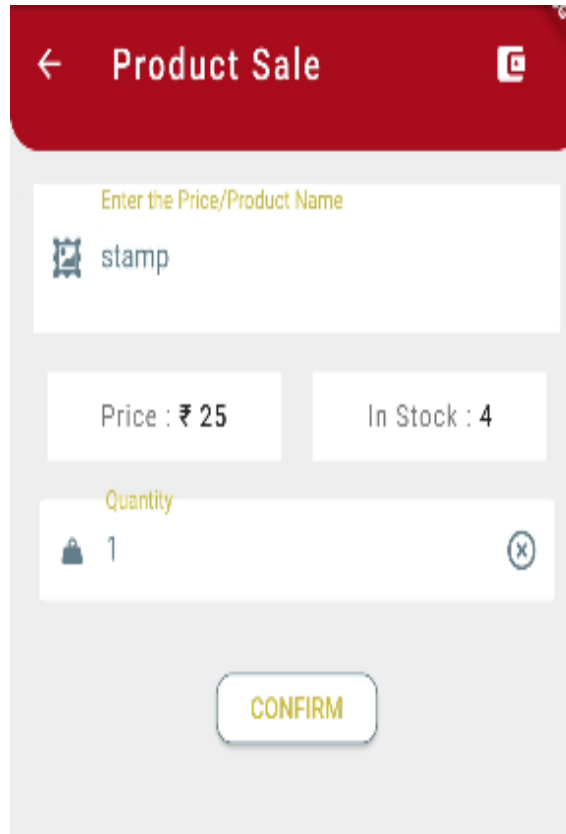Successfully booked an EMO of
₹105
PNR Number
049213011673525565

PRINT   OKAY

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:

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:

Biller

Collection   Search

Enter the Price/Product Name

ID   b

2923 -> BSNL KTK LL

1. Biller module comprises of two operations:
   - ➢ COLLECTION
   - ➢ SEARCH

Cancellation ID	Tracking No.
Biller Id	2923
Biller Name	BSNL KTK LL
Account No.	1234
Bill Date	21-07-2022
Amount Payable	200

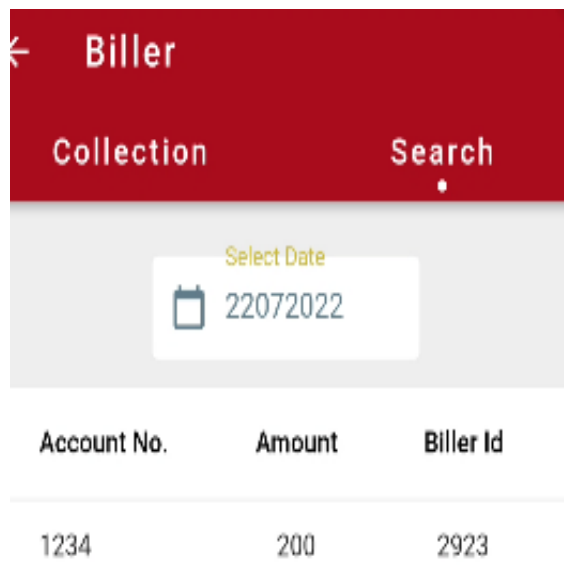Collected Amount

₹   200   ⊗

SUBMIT

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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

Cancellation ID	Tracking No.
Biller Id	2923
Biller Name	BSNL KTK LL

Bill Generated Successfully

OKAY

Amount Payable 200
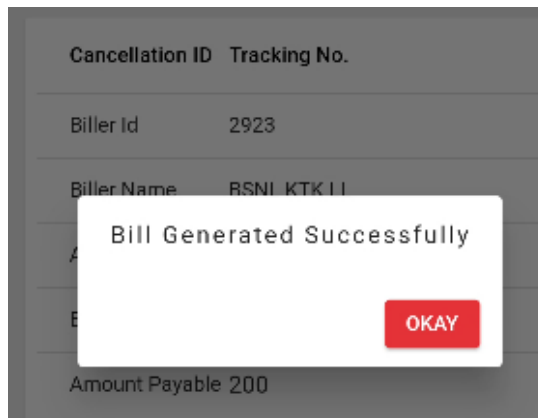
- ➢ Bill generates successfully

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

← **Biller**

Collection   **Search**
                              •

Select Date

📅 22072022

Account No.	Amount	Biller Id
1234	200	2923

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3.1.5   Search/Cancel/Duplicate:

Search/Cancel Transaction:

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 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:

➢ 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.

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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:

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

3.2 Delivery Module:
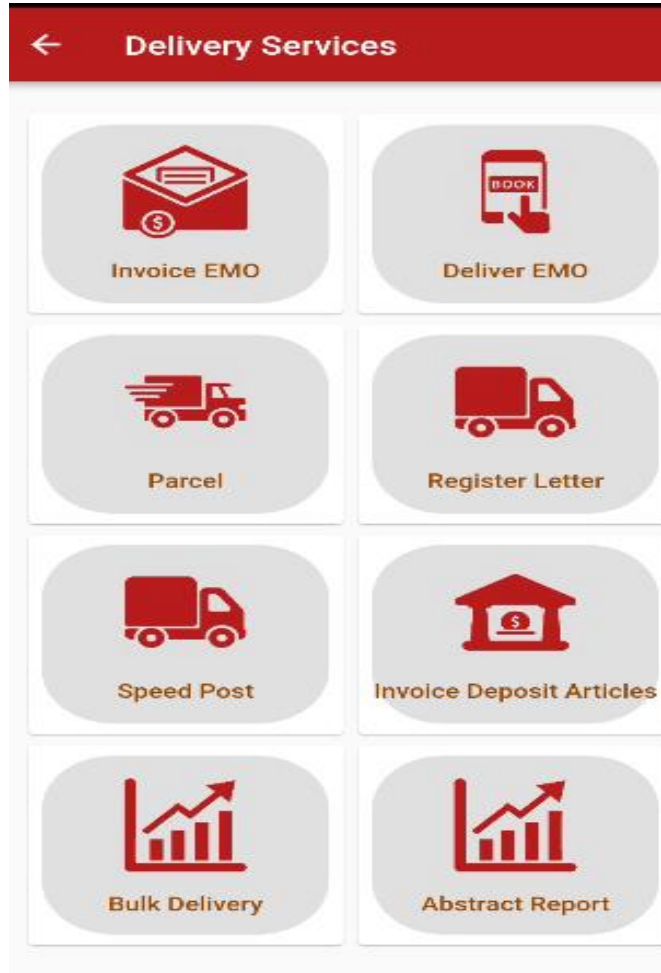

3.2.1   **Invoicing eMO:** Invoicing of eMOs will be done using this module.

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:
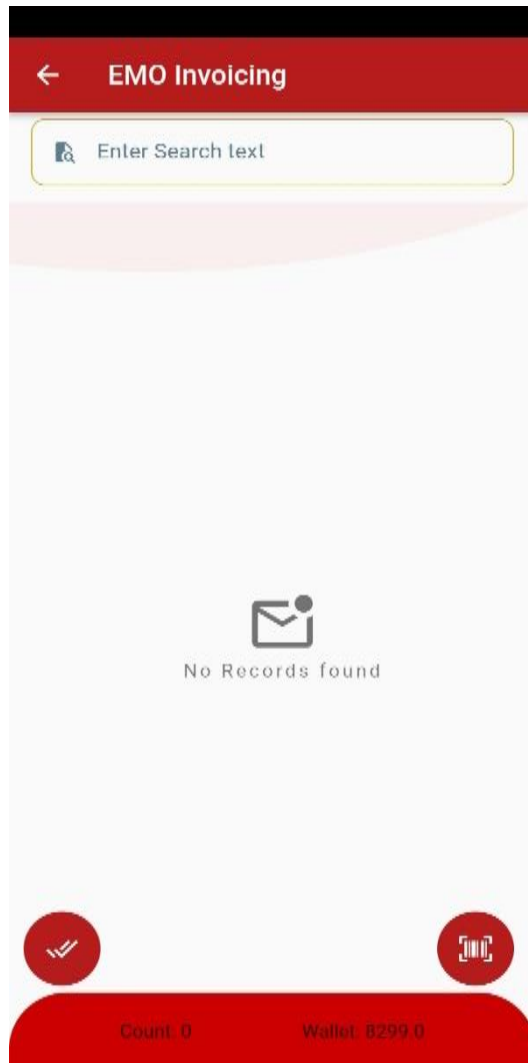
> ➢   All received eMOs can be invoiced by the user by using this module for payment.

3.2.2 - 3.2.5 Deliver Parcel/Register letter/Speed Post:
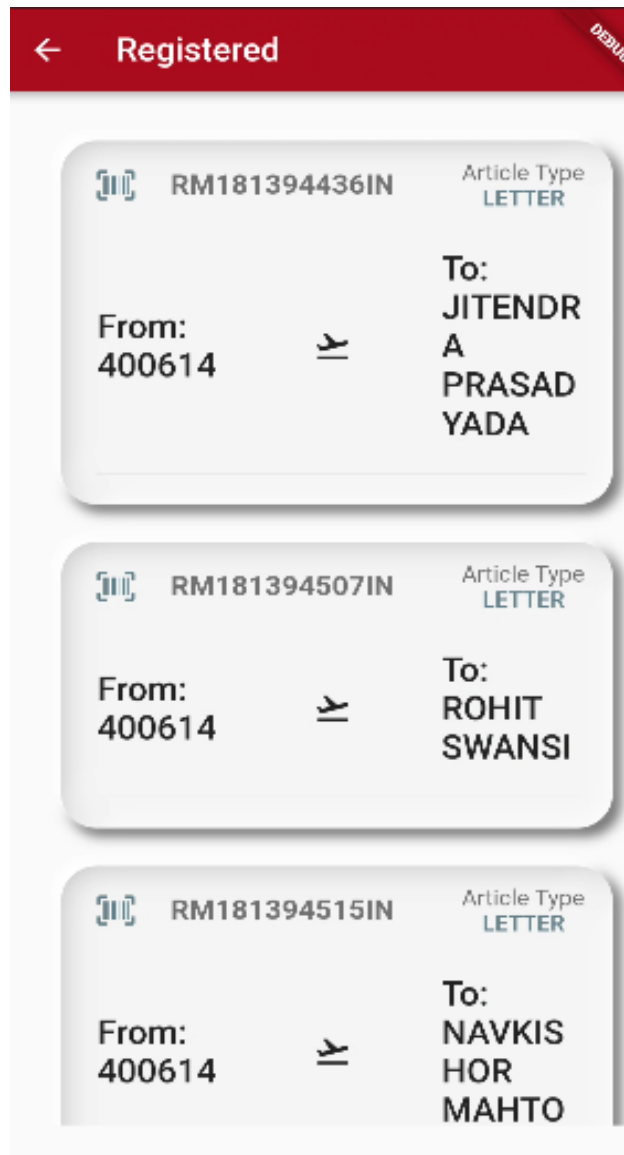
> ➢ Article No, Addressee name and Address will be auto populated on the screen and he
> has to click on each articles for taking returns.

a. Marking Delivery

> Select "**Delivery**" as Delivery remark from the dropdown list for delivery of the article.

b. Marking Undelivered:

> Select "Redirection" from the drop down list and select reason for redirection

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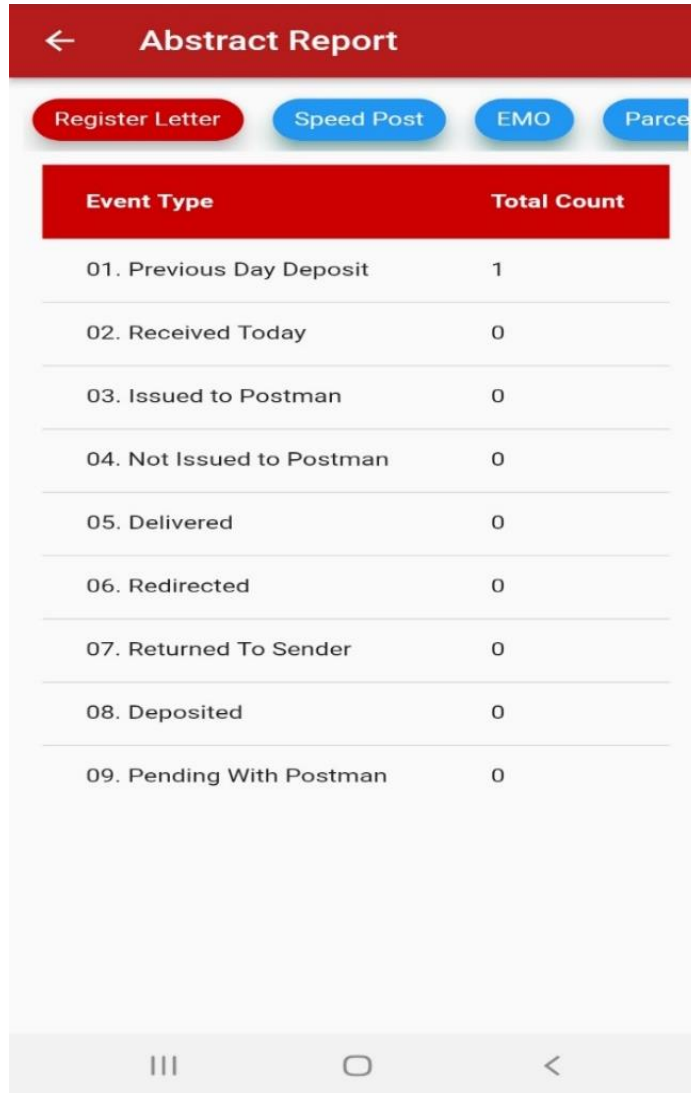
➢ Deposit articles which are expected to be invoiced to postman can be done using "Invoicing Deposit Articles" module. Deposit Articles can be delivered/updated only after invoicing.

3.2.7 Bulk Delivery:
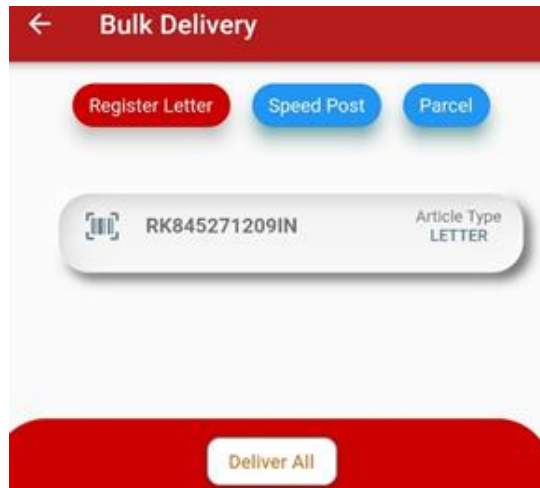
➢ This option is   for bulk delivery. User can use this option for bulk delivery of all accountable articles (RL, SP & PL).

3.2.8 Abstract Report:

> User can generate the abstract report for Registered Letter, Speed Post, Parcel and eMO using this module.
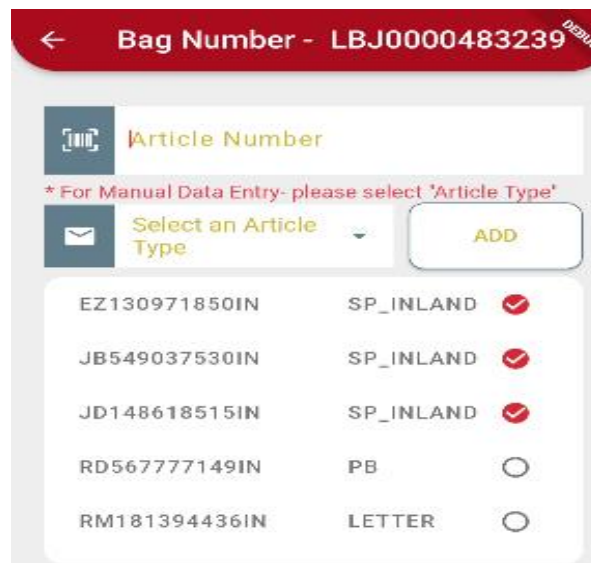
3.3 Bagging services:

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**.**
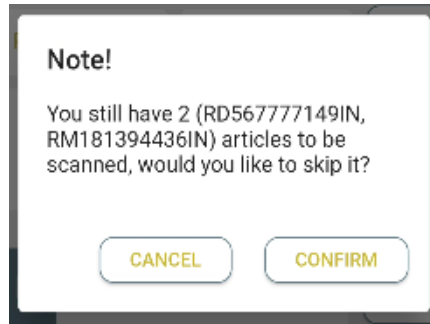
Receiving Inventory/document/cash:

🖾 Inventory Name		Quantity	
Price	Total		ADD
stamp		25	₹5 ✅
envelope		5	₹6 ✅

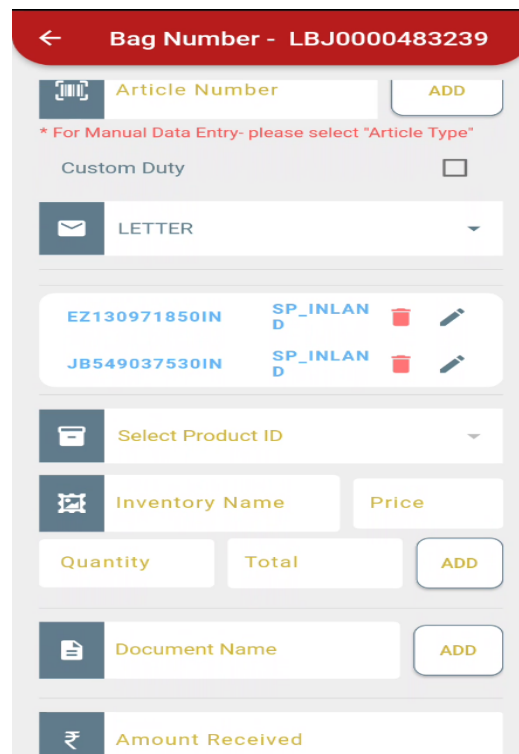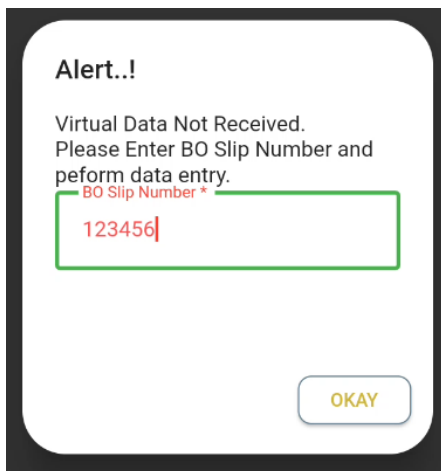| 📄 Document Name	ADD
test	✅
hshs	✅

₹ 3000

SAVE

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
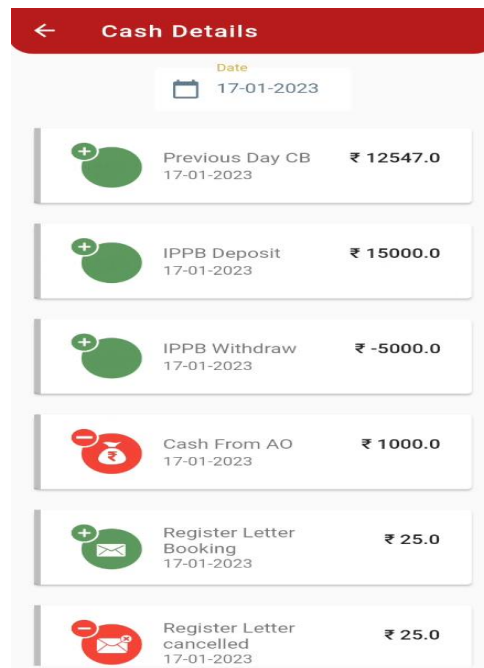

> If virtual data not received, user can receive the bag for making data entry using this option after   entering BO Slip No.
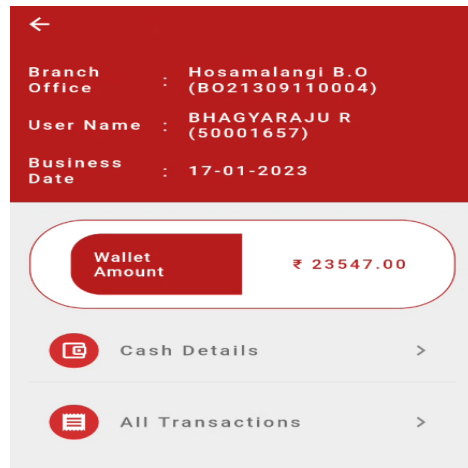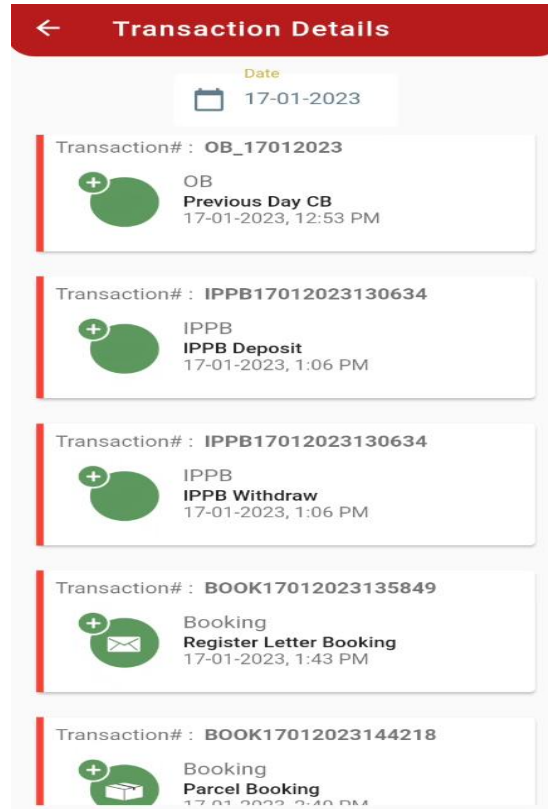
WALLET:

➢ 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
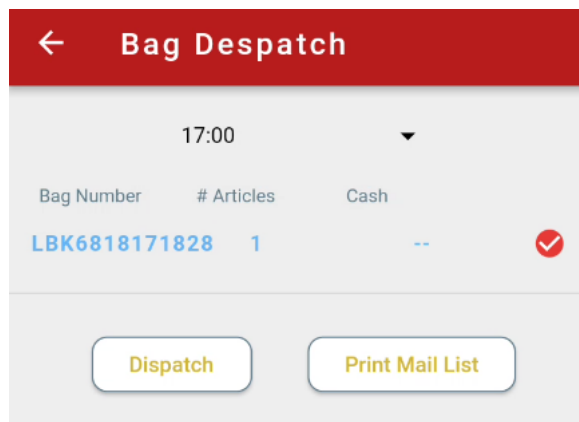

any point of time during the business hours.

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
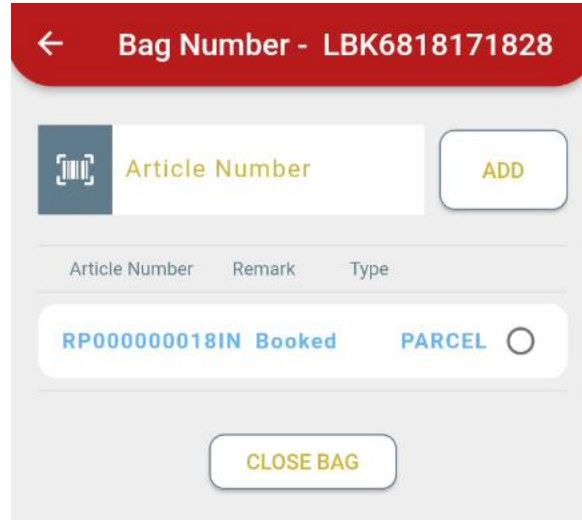
Bag close/dispatch:

> ➤ 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   **Opened Time**
LBJ0000483239   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   **Closed Time**
LBK6818171828   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.

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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
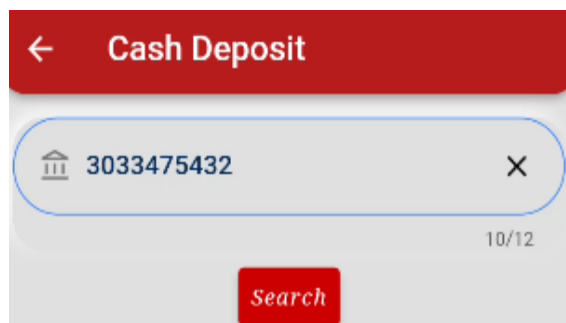
> On Clicking the Cash Deposit Icon the below screen will be displayed

> 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
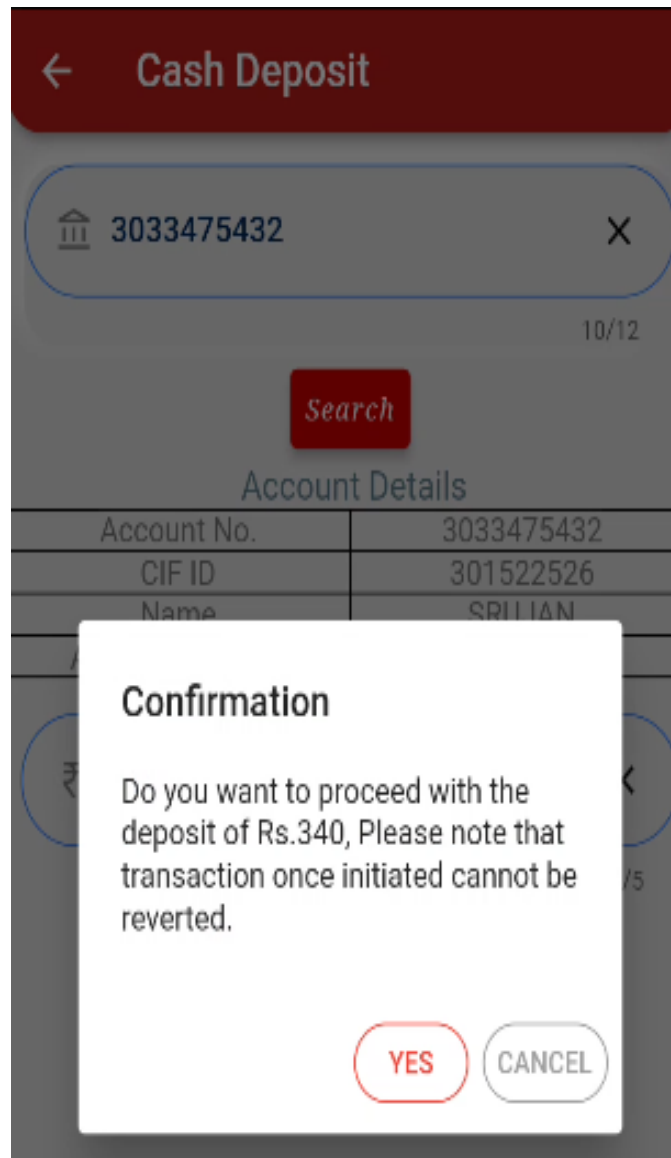
🏛 3033475432 ✕

10/12

Search

Account Details

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

₹ 340 ✕

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.

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➤ BPM to provide the account number and select search option

➤ Account details will be fetched and Account number, Name, Account Balance will be displayed

in screen for BPM validation.

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

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.
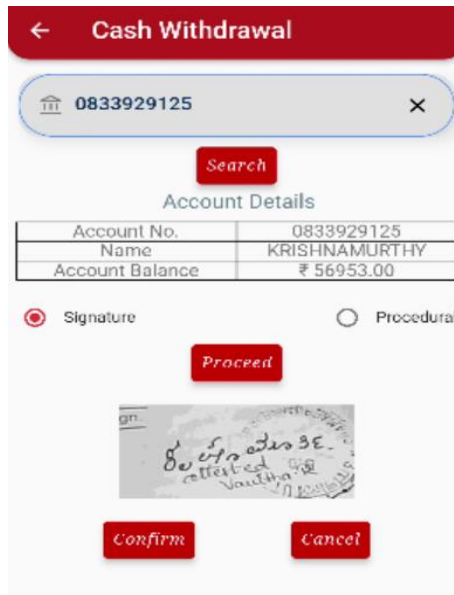
> BPM will provide the Withdrawal amount in the respective field and initiate transaction followed by confirmation in case of Signature/Procedural Mod e.
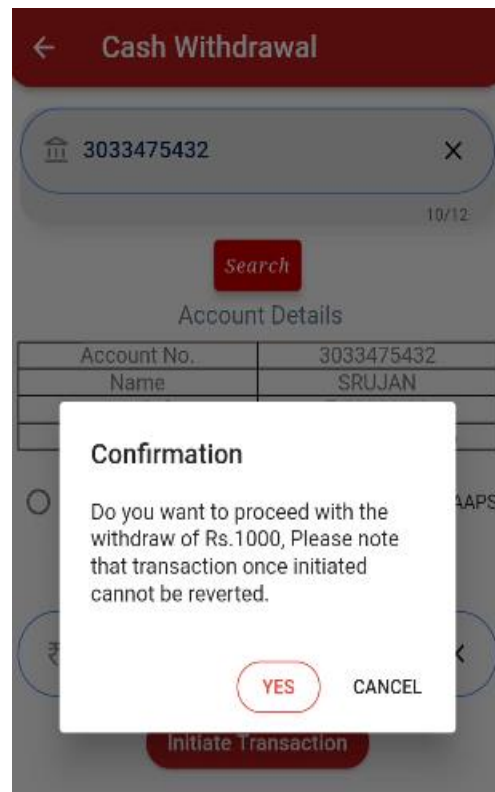
➢ The BPM can use the Aadhaar Authenticated Payment System also. If the Aadhaar details are not available for the account the mode will not be available in withdrawal screen.

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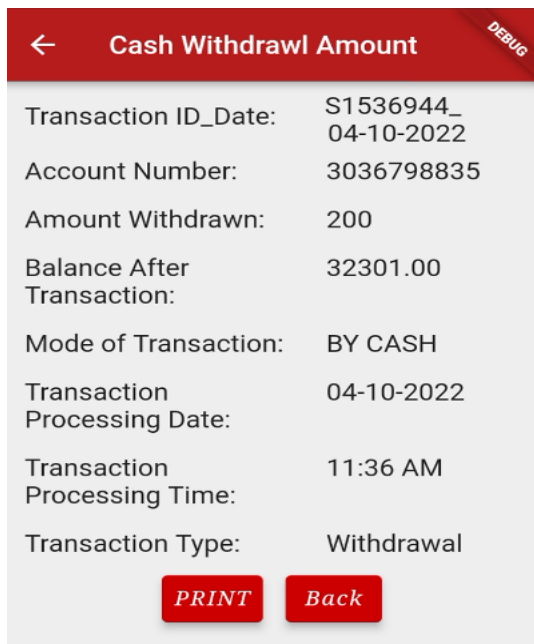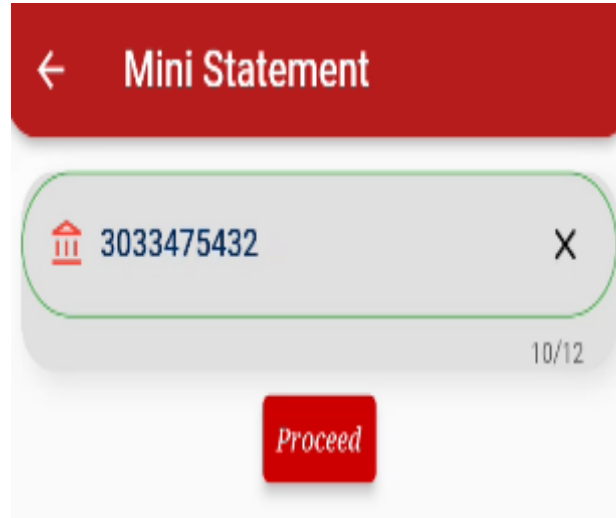
➢ Upon confirmation of withdrawal amount, the fingerprint of the customer will be captured using the Biometric device. Once the same is validated using the Aadhaar service the withdrawal is allowed.


Place any finger on scanner
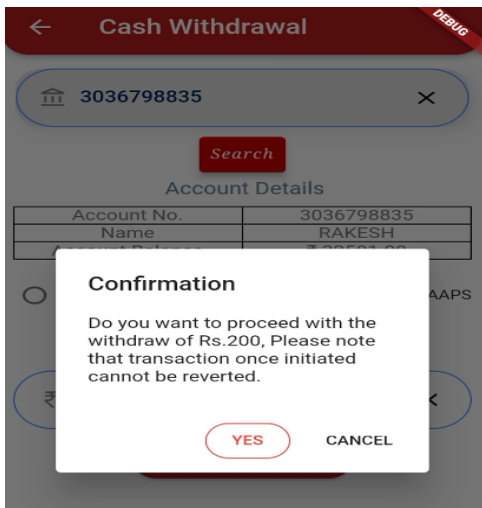
➢ On successful completion of transaction, details will be displayed in the application with the option to print the transaction status.

← **Cash Withdrawl Amount**	DEBUG
Transaction ID_Date:	S1536944_ 04-10-2022
Account Number:	3036798835
Amount Withdrawn:	200
Balance After Transaction:	32301.00
Mode of Transaction:	BY CASH
Transaction Processing Date:	04-10-2022
Transaction Processing Time:	11:36 AM
Transaction Type:	Withdrawal

PRINT   Back

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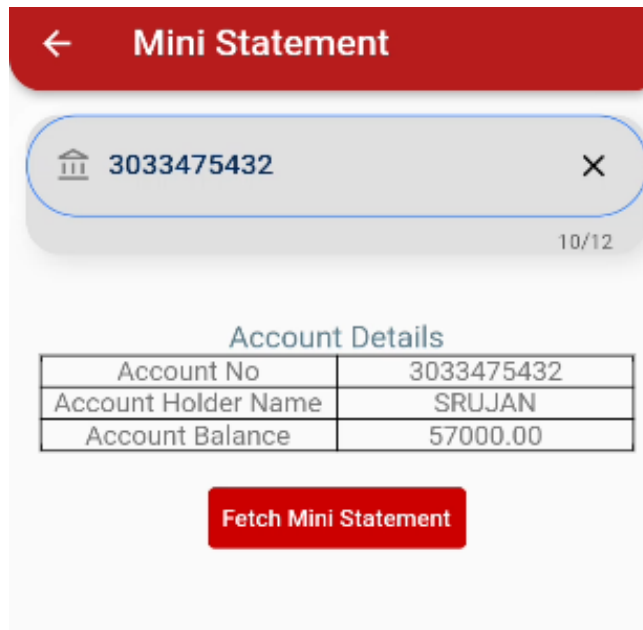
➢ On clicking Fetch Mini Statement button, details of the last 9 transactions in account will be

Mini Statement

← **Mini Statement**

🏛 **3033475432**   ✕

10/12

Account Details

Account No	3033475432
Account Holder Name	SRUJAN
Account Balance	57000.00

Account Statement

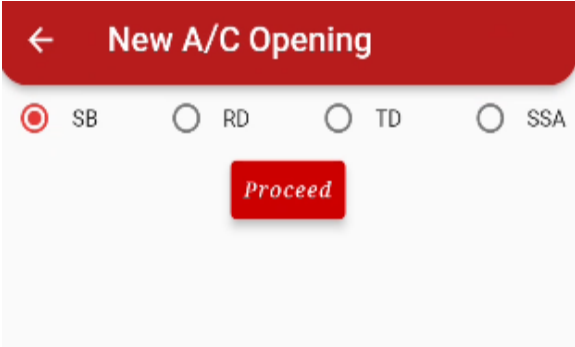| Sl. No.	DATE	Tran. Particulars	Type	Amount
1	11/01/2023	SDP_BO21309110004_50001657_BY CASH	D	1000.00
2	11/01/2023	SDP_BO21309110004_50001657_BY CASH	C	340.00
3	11/01/2023	SDP_BO21309110004_50001657_BY CASH	C	105.00
4	11/01/2023	SDP_BO21309110004_50001657_BY CASH	C	1.00
5	11/01/2023	SDP_BO21309110004_50001657_BY 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	D	1.00

PRINT   **BACK**

displayed with Option for printing the details.

4.4 Account Opening

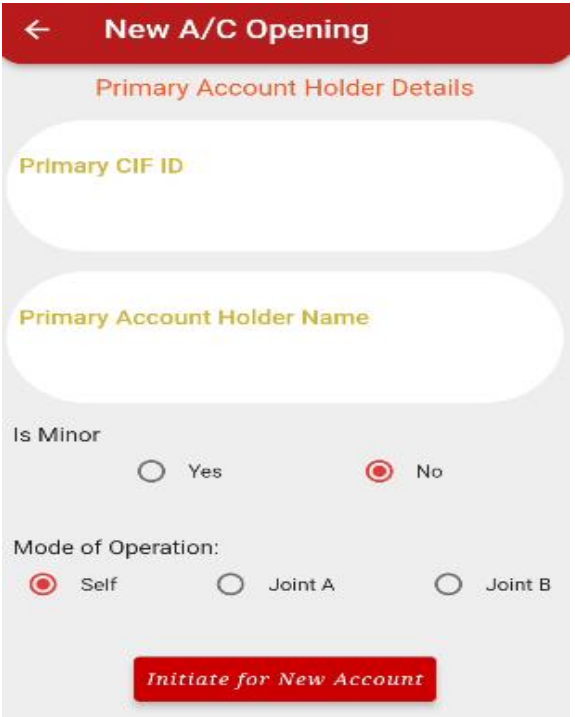➢ For Opening SB/RD/TD/SSA Accounts in Android app, BPM should select Account Opening

option in the CBS home page.

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

New Account Opening-...

Account Opening Details
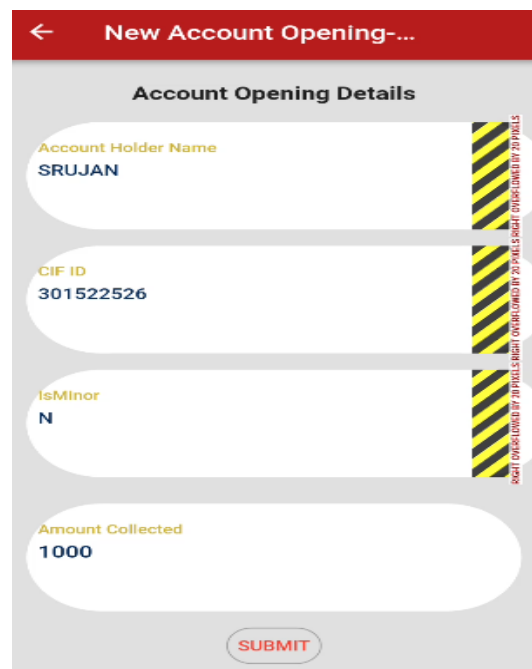
Account Holder Name
SRUJAN

CIF ID
301522526

IsMInor
N

SUBMIT

➢ 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.

New A/C Transaction Status

Transaction submitted successfully

Transaction ID_Date:	S2522732_ 11-01-2023
Reference Number:	F23011115484485730KA
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 be provided by BPM and on submission Account details will be fetched.

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

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

➢ 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 ✕

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.

➢ 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

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: 11-01-2023

Account Type: SB

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

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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

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

as shown below.
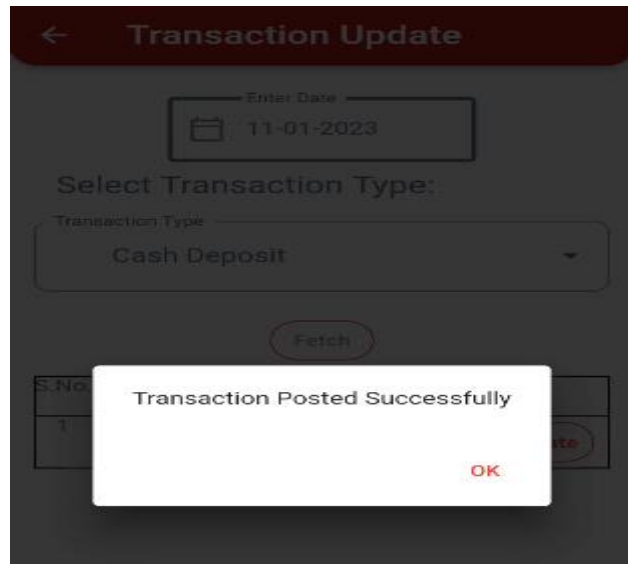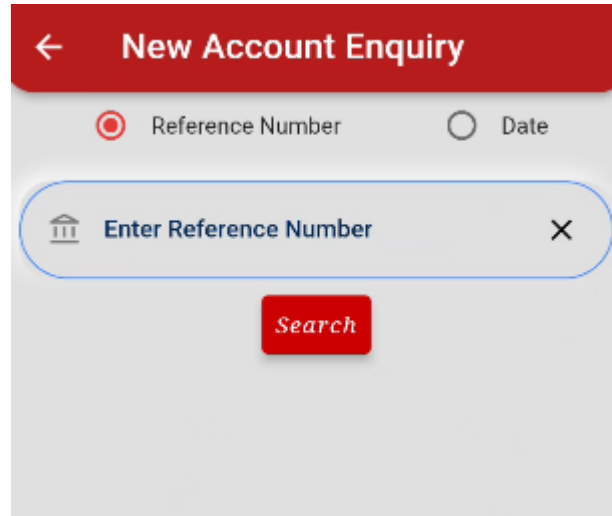
If transaction is not completed, failed messages also will get.
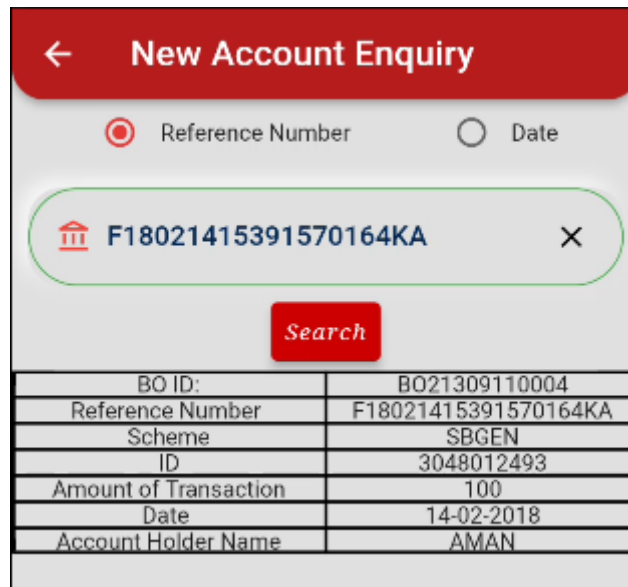
During each transactions, it is advised to see the wallet amount.

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:	BO21309110004
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.

Entered Reference Number not
available

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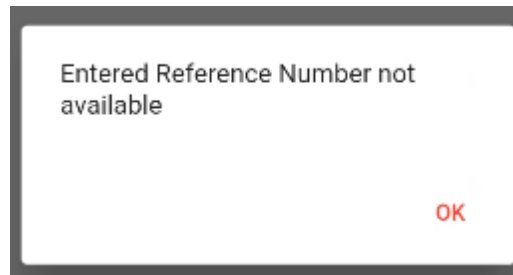
➢ Also we can check with the date and all the newly opened account on that particular date will

← **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:
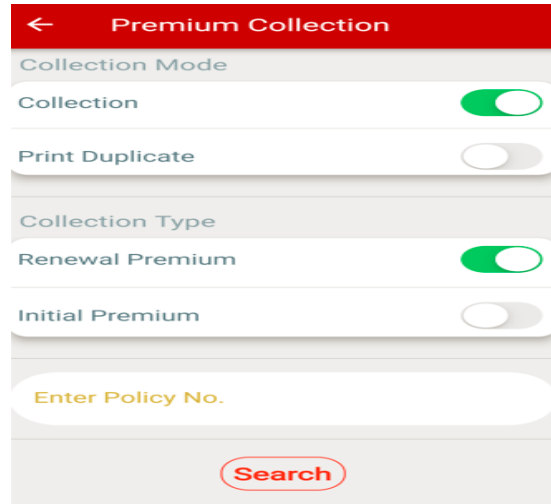
- ➤ Office Configuration & Mapping in DARPAN.
- ➤ User Mapping in DARPAN.
- ➤ Bio-metrics of BPM.

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

5.2   PLI / RPLI – Premium Collection:

Renewal Premium:

> ➢ 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

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.

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.

➤ 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.

> 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 policy details will be shown after entering policy number.

➢ Click on "GET QUOTE" button, the following screen will appear.

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 Prinicpal: 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 Eligiblity: 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

➢ 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	Quarterly Quote
₹ 1,670.00	₹ 4,998.00
Half-Yearly Quote	Annually Quote
₹ 9,872.00	₹ 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.

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5.6 New proposal indexing:

- ➢ Select 'Proposal Indexing' option.

- ➢ BPM needs to select Product details in 'Product selection' screen.
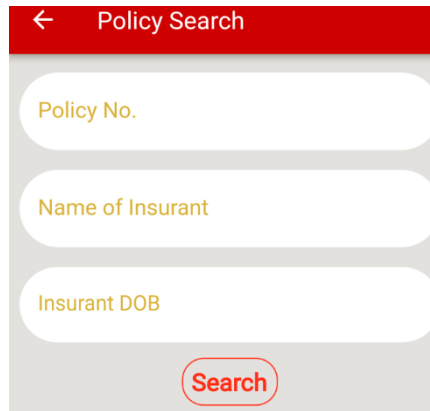
> BPM needs to enter 'Date', 'Gender', 'DOB' and other details in 'Date and Issue Post office' and Click 'Next' button.

> BPM needs to enter SA, Premium Ceasing Age / Maturity Age according to the selected Product and make payment either as Cash / Cheque.
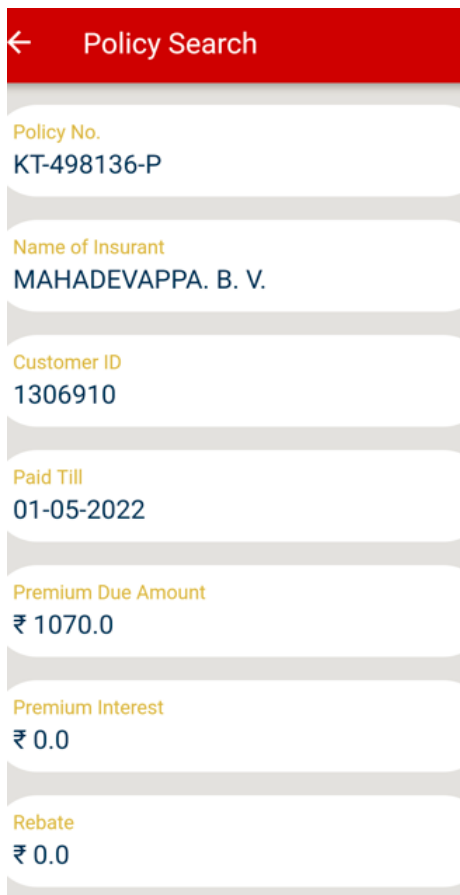
> Enter all the fields and click on Submit. It will generate a Unique Proposal Number.

> 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.

5.8 Service Request Indexing:

➢ Select type of service request.

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

- ➢ 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.

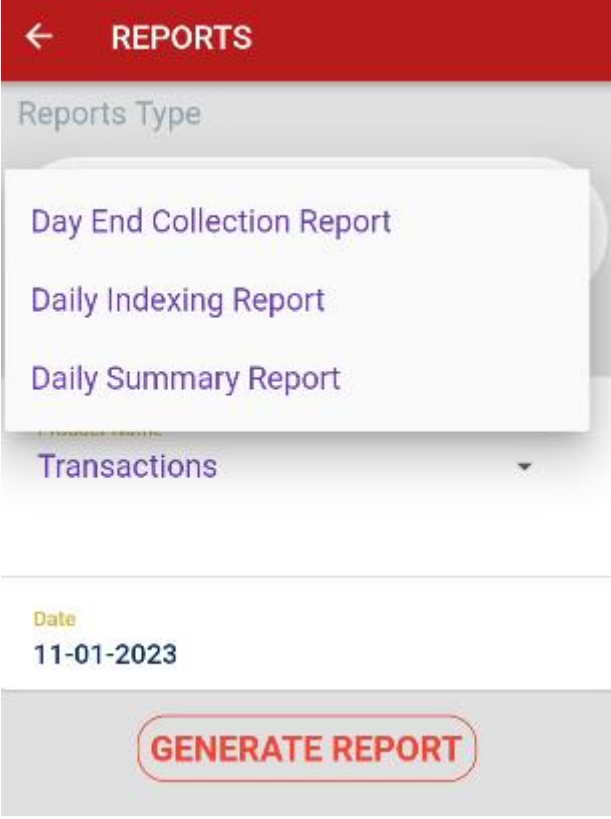| ← Indexing Screen	← Indexing Screen
Loan	RAKESH C N
▬ Policy No.	
0000005057457	▬ Customer ID
	74561620
▬ Insured	
RAKESH C N	▬ Premium Paid Till
	2022-08-31
▬ Customer ID	
74561620	▬ Policy Status
	AP
▬ Premium Paid Till	
2022-08-31	▬ Issue Date
	2021-07-12
▬ Policy Status	
AP	▬ Installment Amount(Excl. Tax)
	1583
▬ Issue Date	
2021-07-12	▬ ProductName
	Santosh
▬ Installment Amount(Excl. Tax)	
1583	▬ Passbook Paid To Date
	01-09-22
▬ ProductName	
Santosh	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

➢ 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.

➢ Select "Daily Indexing" Report to generate Report of Policies for which Service Indexing requests are raised.

➢ Select "Daily Summary" Report to generate Summary of Daily Collection for PLI / RPLI Policies.

Daily Summary Report
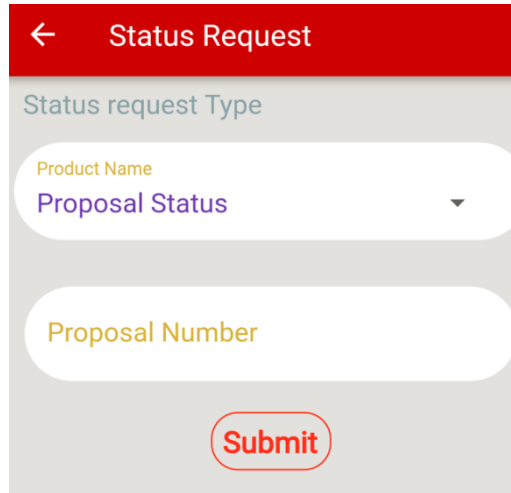
Daily Summary Report- PLI

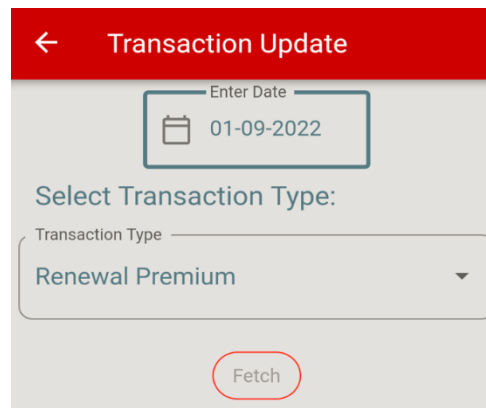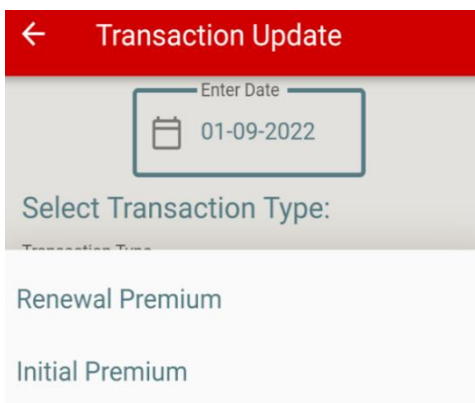| Receipts	CASH	CHEQUE
First Year	3104.0	0.0
Second Year	0.0	0.0
Renewal Premium		
Revival Premium		
Default realized		
First Year CGST Collected	0.0	0.0
First Year SGST Collected	0.0	0.0
First Year UTGST Collected		
Renewal Year CGST	0.0	0.0
Renewal Year SGST	0.0	0.0
Renewal Year UTGST		
Total	3104	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.
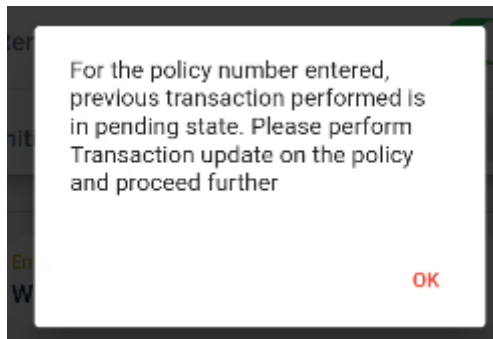
➢ User has to click on "Fetch Status" for each transaction one by one to view the status of the transaction.

5.12 To check Disbursement Status:

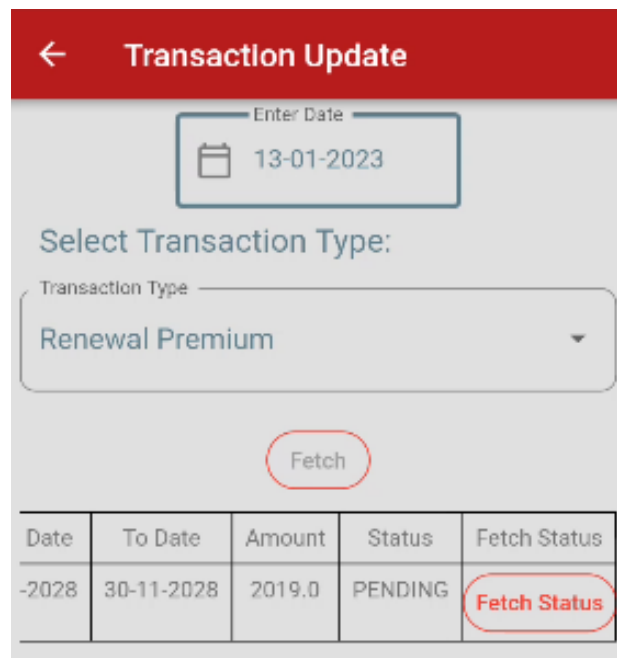- ➢ BPM can check status of any Disbursement Requests like Maturity claim, Death claim, Loan etc., in the PLI App.

- ➢ Click on "Disbursement Status" option.

- ➢ Various types of Service Requests are shown above.
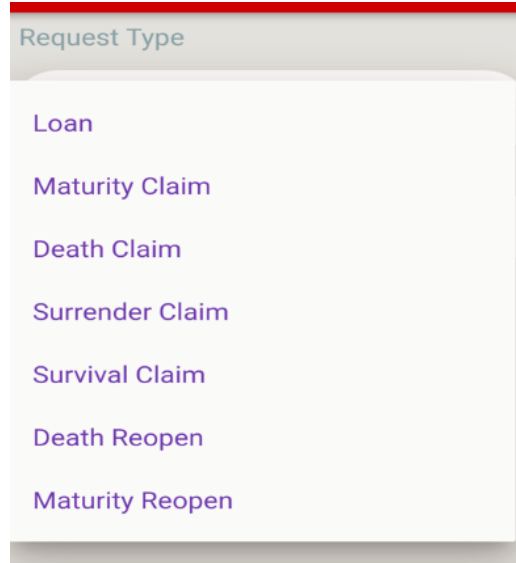
- ➢ Enter the Policy No. and click on Search Button.
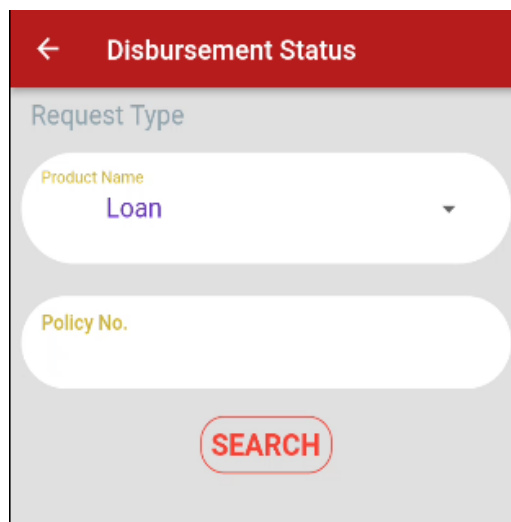
- ➢ App will fetch the data / details from Core Solution & display in the App.

- ➢ Information to the entered policy number will be shown and also the disbursement status will be shown accordingly.

← **Disbursement Status**			
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.