DEPARTMENT OF POSTS

MINISTRY OF COMMUNICATIONS & IT

GOVERNMENT OF INDIA

Business Process Document

Proposal Transfer

Submitted by

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1. Introduction

The purpose of this document is to describe the process of Proposal Transfer where the unapplied amount from one proposal can be transferred to another proposal. Proposal Transfer can only be done before the proposal is approved or policy number generated.

2. Pre-Requisites

- Proposal Number exists in NBF
- Collection has been done on the proposal number
- There should be some amount in unapplied status on the proposal in suspense.
- Proposal Number status should not be rejected or withdrawn
- Proposal Number should not be approved or converted into Policy

3. Users

- System Admin

4. Process

Proposal Transfer functionality is designed to cater to the need of transferring any unapplied amount on a particular proposal prior to any policy being generated against it to another proposal that is not approved yet, if the customer so desires. This can be done from Suspense Maintenance and the amount transferred instantly to another proposal.

System Admins in DoP will have the access of transfer of money from one Proposal to another Proposal and no supervisor is required for the transaction to approve the transaction of transfer money.

Navigation details: Dashboard->Suspense Maintenance-> Proposal.

- User will first need to login to the system by entering User name and Password and click on Submit button.
- User will then navigate to ‘Suspense Maintenance’ icon on the Dashboard highlighted below.

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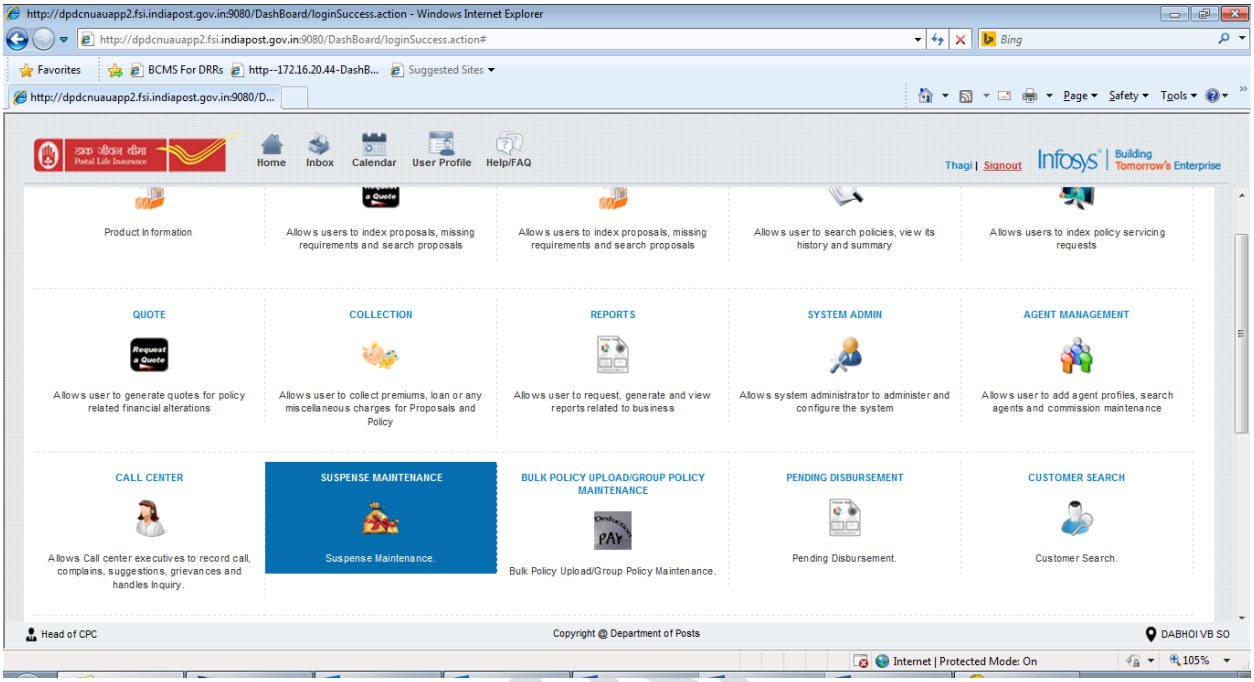
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Home
Inbox
Calendar
User Profile
Help/FAQ
Thagi | Signout
Building Tomorrow's Enterprise
Product Information
Allows users to index proposals, missing requirements and search proposals
Allows users to index proposals, missing requirements and search proposals
Allows user to search policies, view its history and summary
Allows users to index policy servicing requests
QUOTE
Allows user to generate quotes for policy related financial alterations
COLLECTION
Allows user to collect premiums, loan or any miscellaneous charges for Proposals and Policy
REPORTS
Allows user to request, generate and view reports related to business
SYSTEM ADMIN
Allows system administrator to administer and configure the system
AGENT MANAGEMENT
Allows user to add agent profiles, search agents and commission maintenance
CALL CENTER
Allows Call center executives to record call, complains, suggestions, grievances and handles Inquiry.
SUSPENSE MAINTENANCE
Suspense Maintenance.
BULK POLICY UPLOAD/GROUP POLICY MAINTENANCE
Bulk Policy Upload/Group Policy Maintenance.
PENDING DISBURSEMENT
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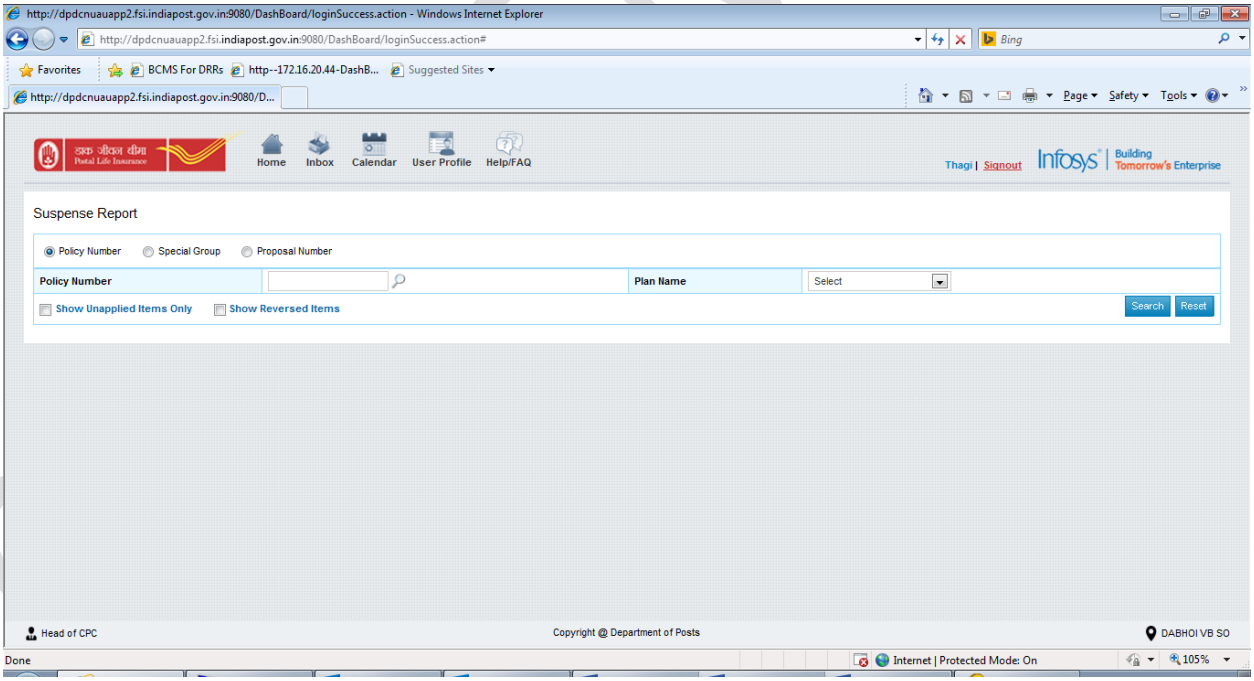
http://dpdcnuauapp2.fsi.indiapost.gov.in:9080/DashBoard/loginSuccess.action - Windows Internet Explorer
Home
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Policy Number
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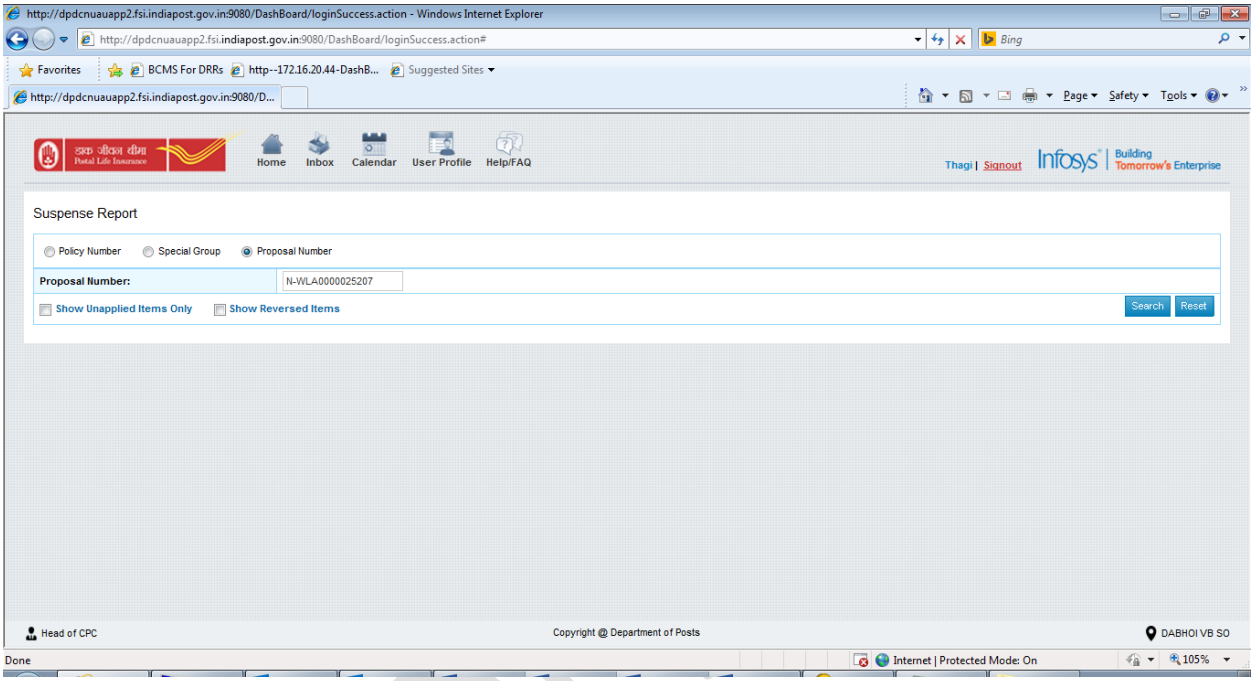
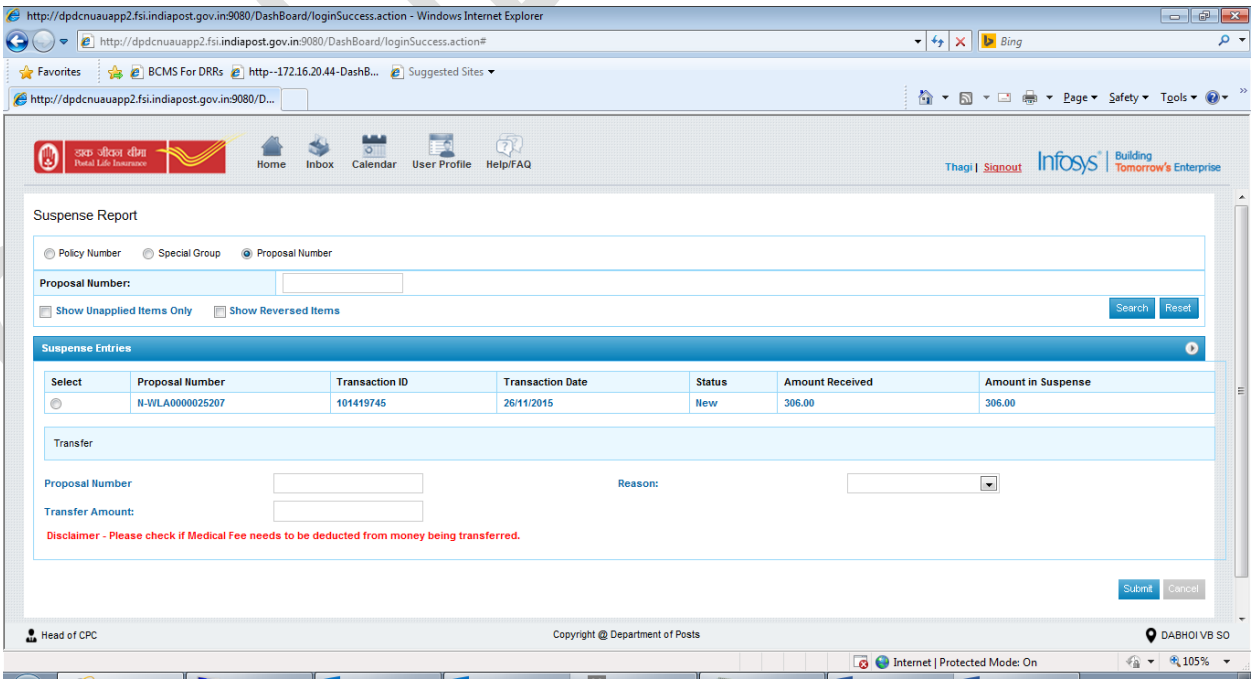
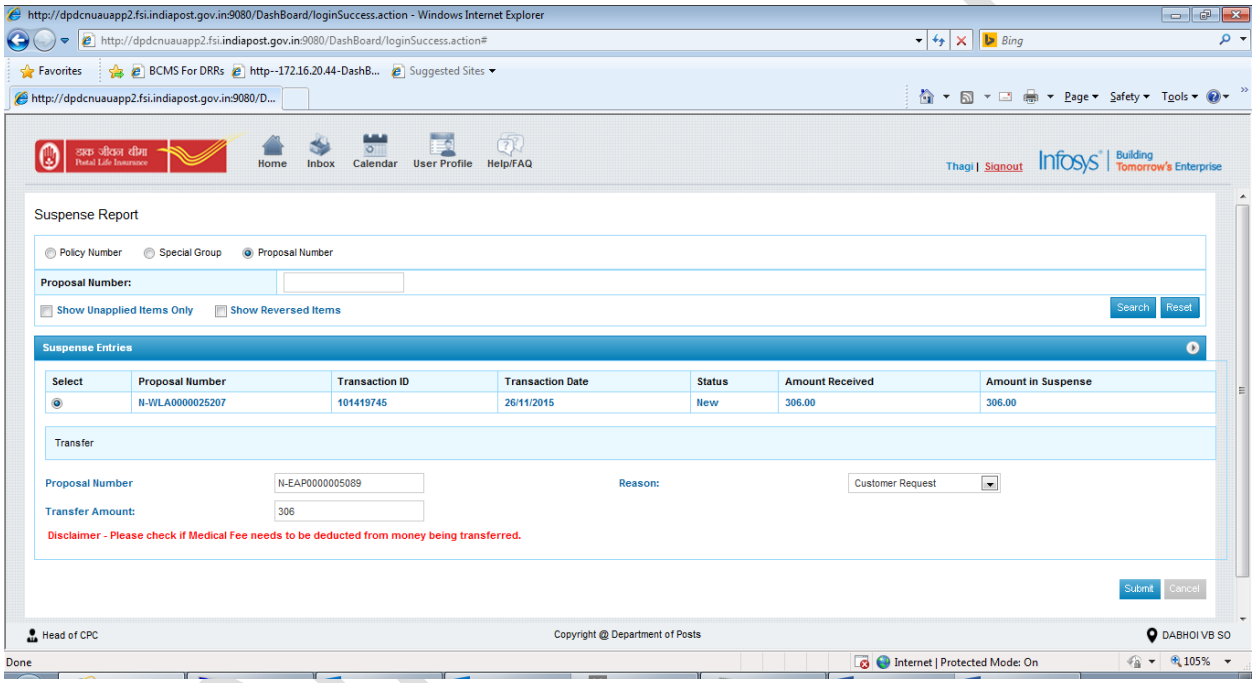
User will now select the radio button ‘Proposal Transfer’ and enter the proposal number from which the amount needs to be transferred to another proposal



The table that displays below will show all the collections and transfers done against the proposal



- The user will then select the row which displays the unapplied amount
- The user will enter the proposal number to which the unapplied amount need to be transferred from the above proposal in the column ' Proposal Number' under the head 'Transfer' as seen below
- Reason will be selected by the user from the drop down under 'Reason'
- The amount that needs to be transferred will be entered under 'Transfer Amount'. The user can transfer the entire amount or less as desired.



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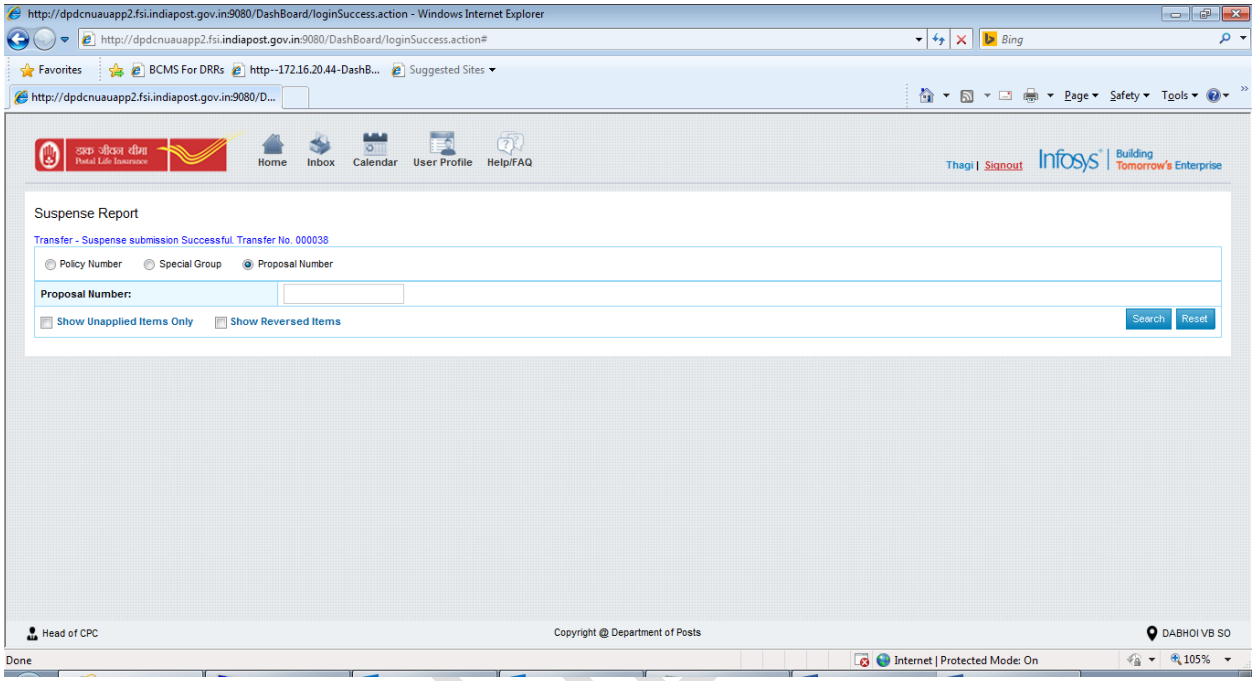
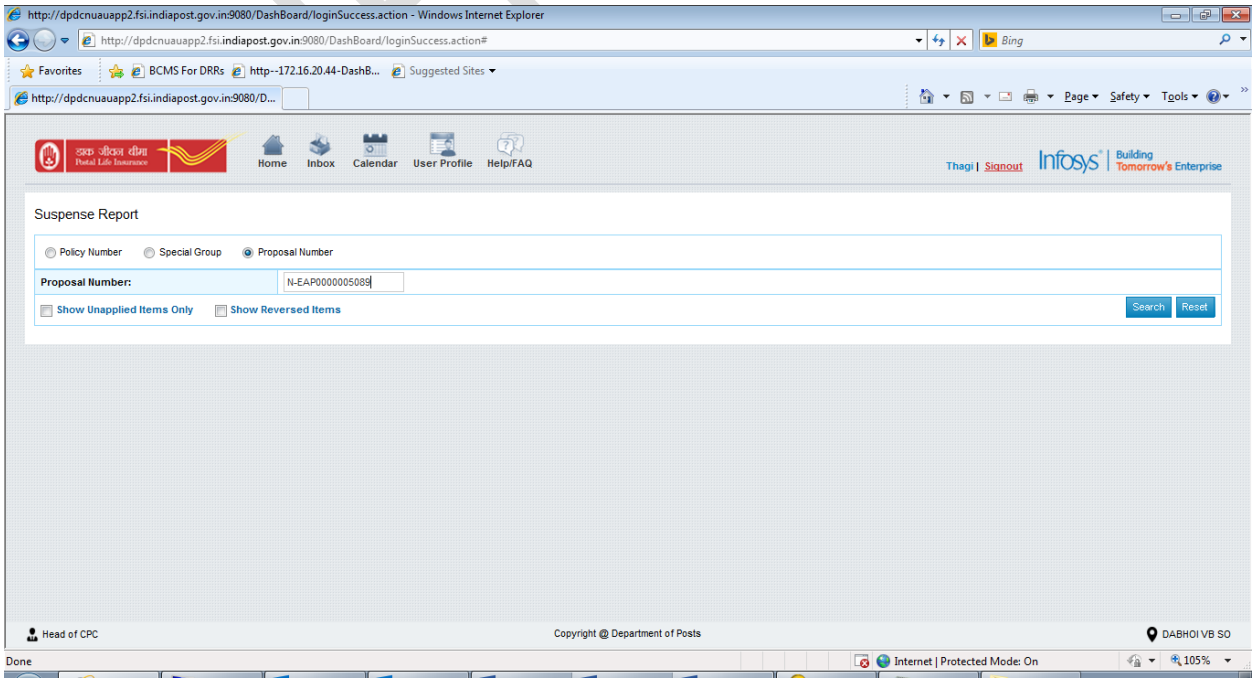
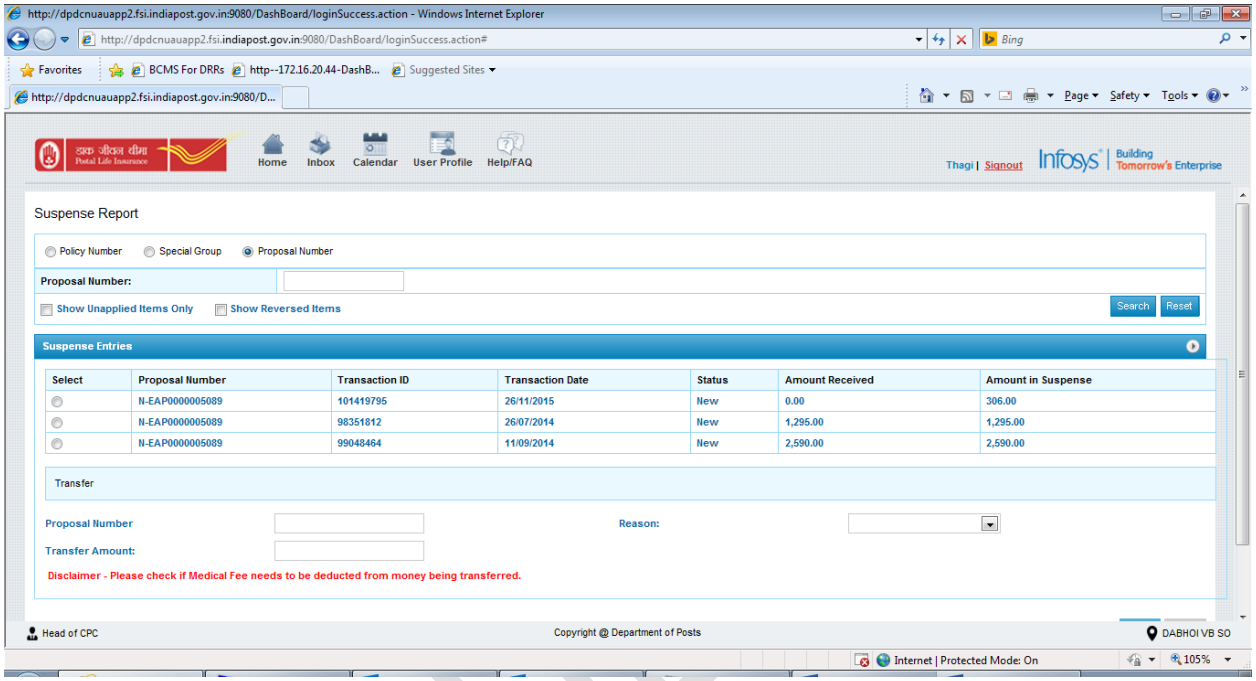
Once all the details are entered the user will click on 'Submit'. The following message will be displayed: 'Transfer – Suspense submission successful.' The transfer number will also be generated.



- The user will now go back to suspense maintenance to check the amount transferred.
- The user again selects radio button 'Proposal Number' and enters the proposal to which the transfer was made



The new amount that was transferred will appear in the table below along with all the already existing payments/transfers on the proposal as seen below.



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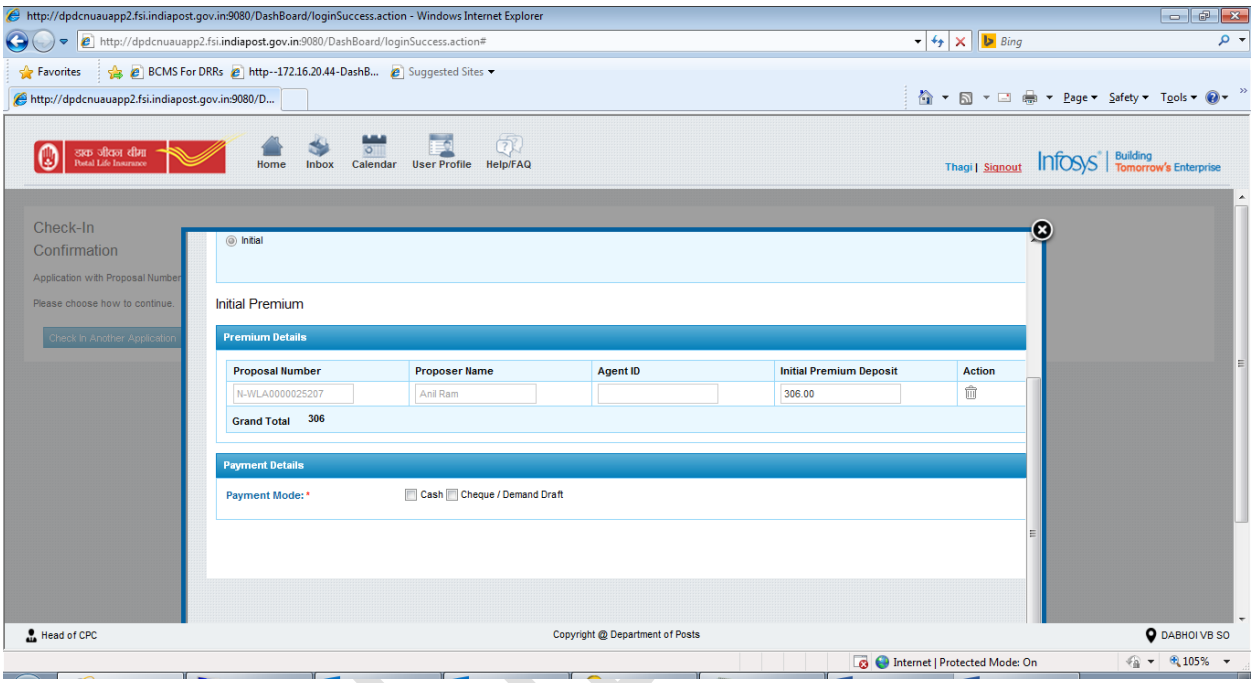
5. Process of reversal of Proposal Transfer

The process of Proposal Transfer from N-WLA0000025207 to N-EAP0000005089 and then transferring some amount back from the second proposal to the first one is shown below-

A new Proposal is added and a payment is made on it by the customer as seen below



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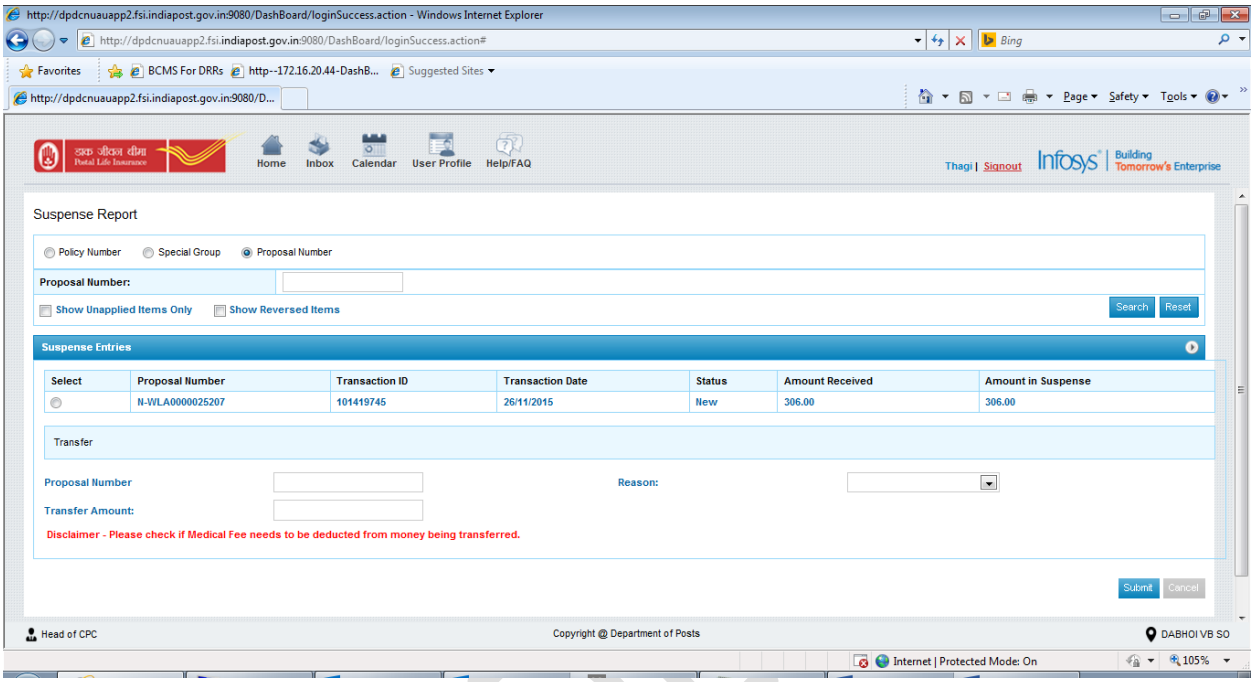
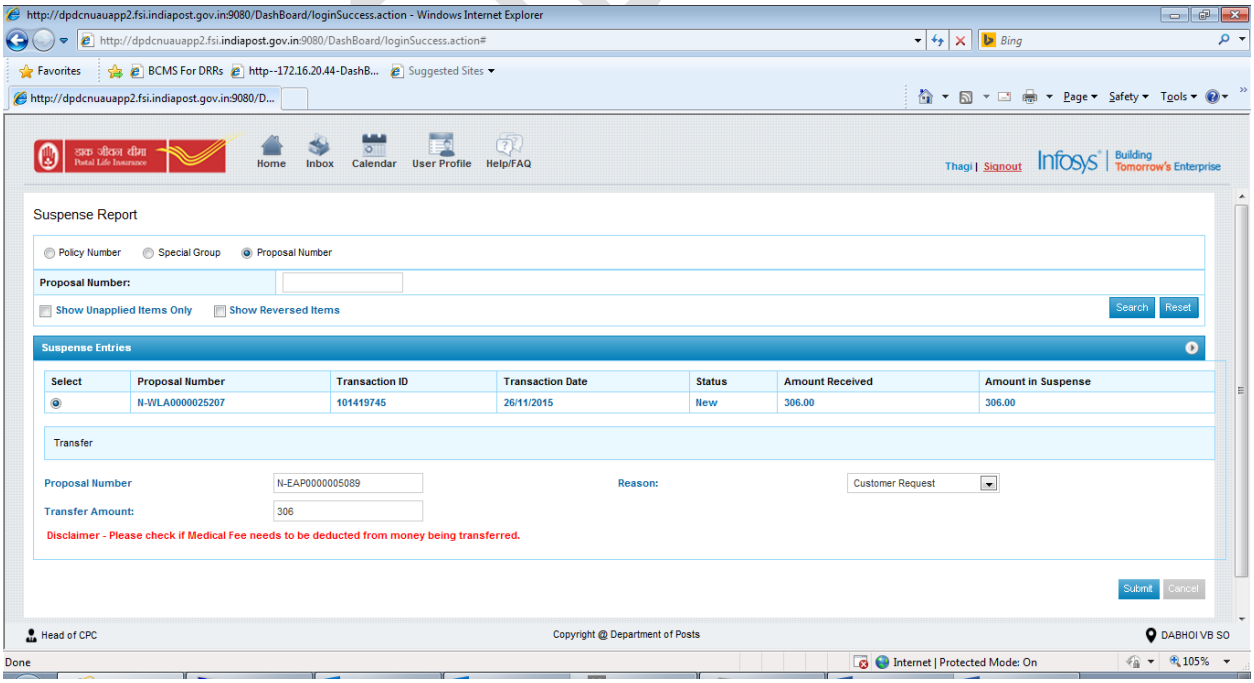
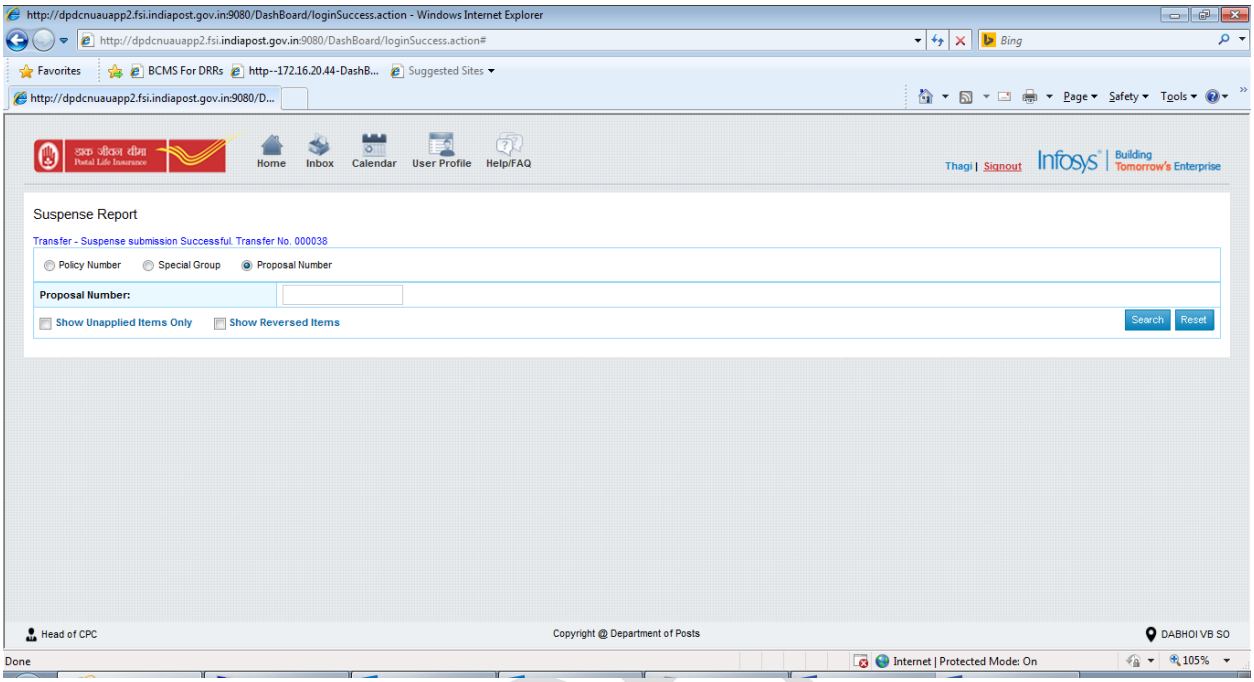
- The user goes to Suspense Maintenance, selects the radio button 'proposal number' and enters the proposal number on which the payment was made above.
- The payment details will be displayed as seen below once the user clicks on search



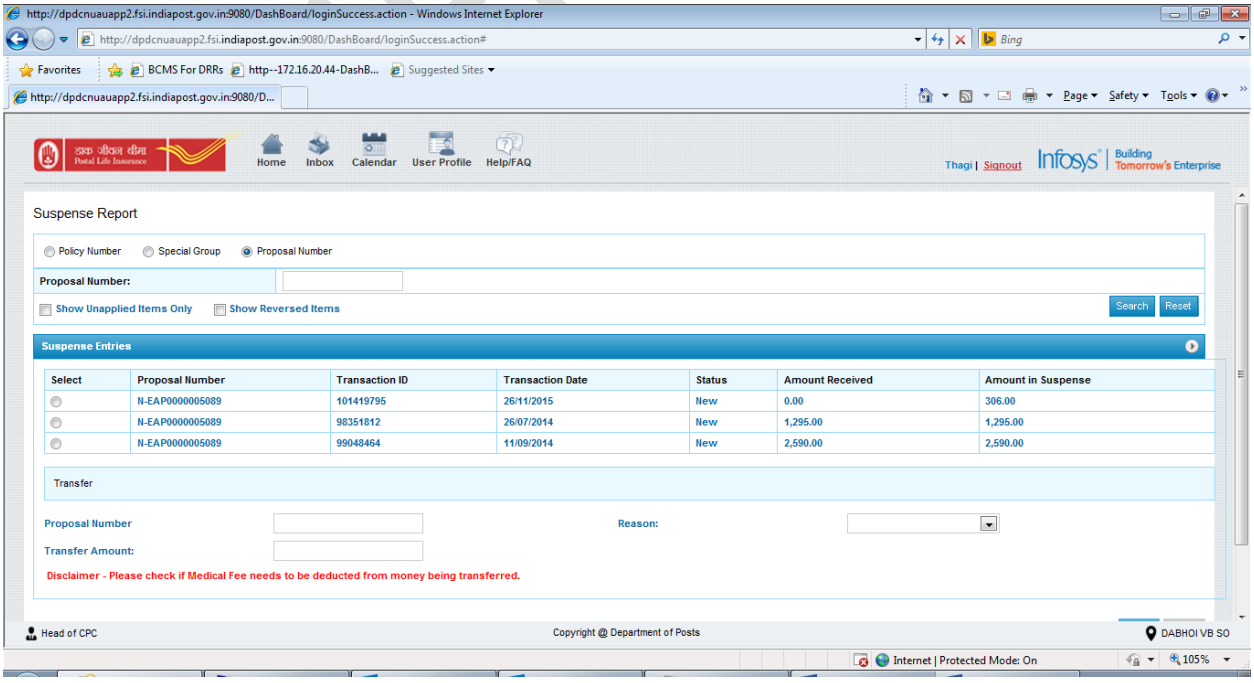
- The user then enters the second proposal number to which the amount needs to be transferred along with reason and the transfer amount



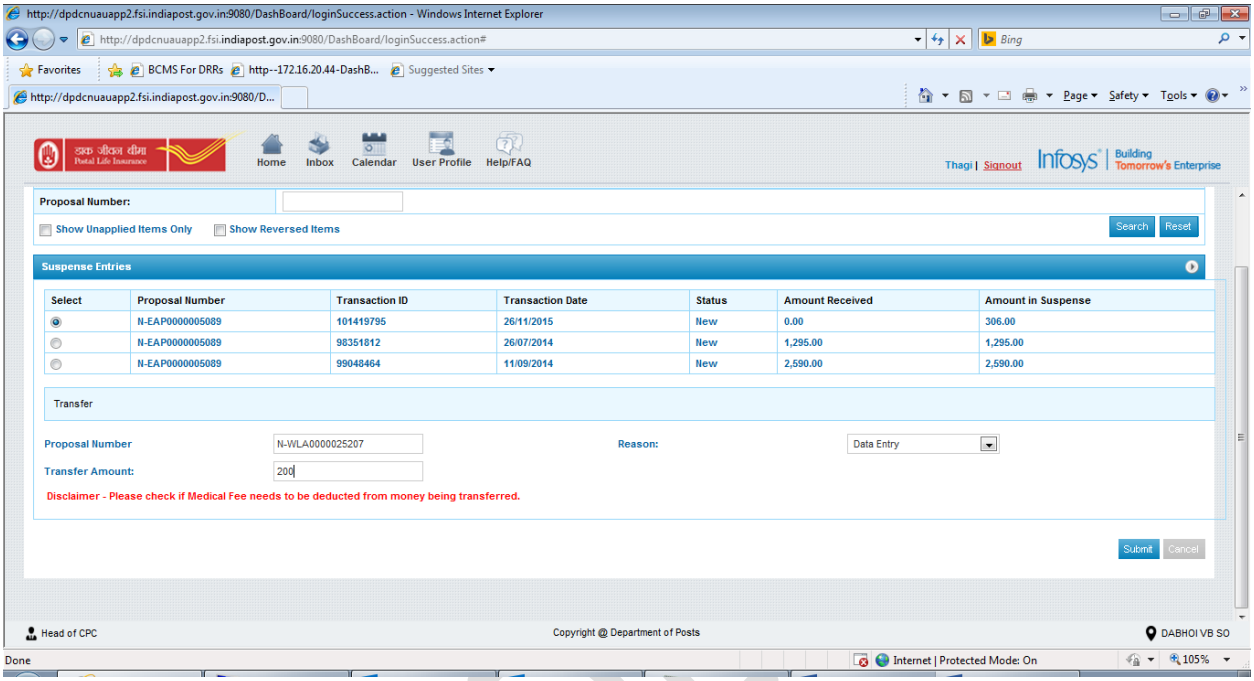
The user then clicks on submit and the amount is successfully transferred and the success message as seen below is displayed



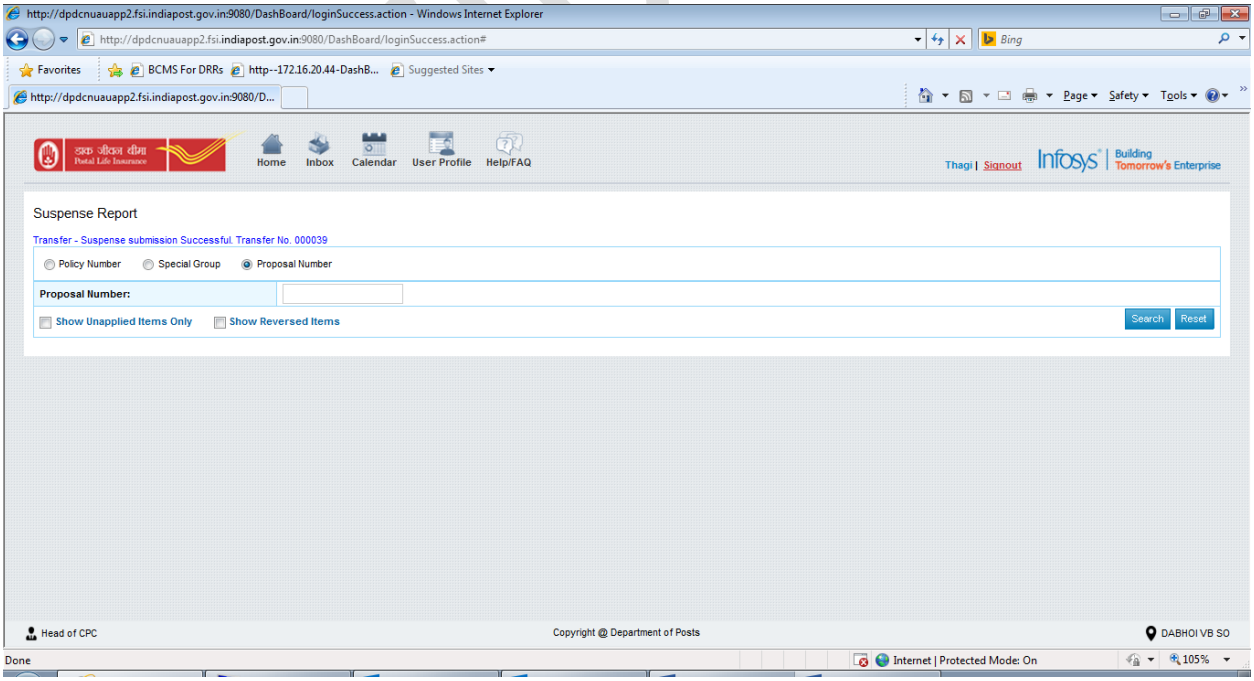
- The user now goes back to Suspense report and enters the second proposal number to transfer the amount back to the original proposal
- The details of the second proposal are displayed in the table as seen below
- The table will reflect the amount that was earlier transferred to this proposal from the first one



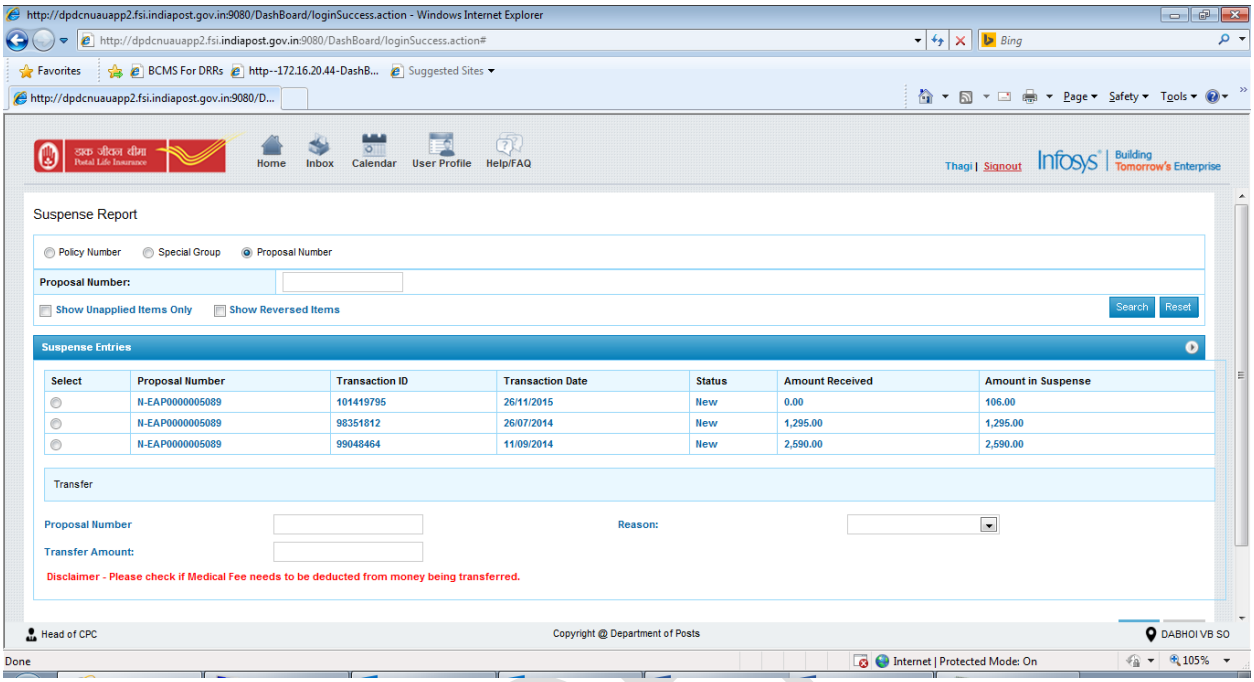
- The user will select the row from which the amount needs to be transferred back
- The original proposal number will be entered along with the reason for transfer and transfer amount in the fields below the table



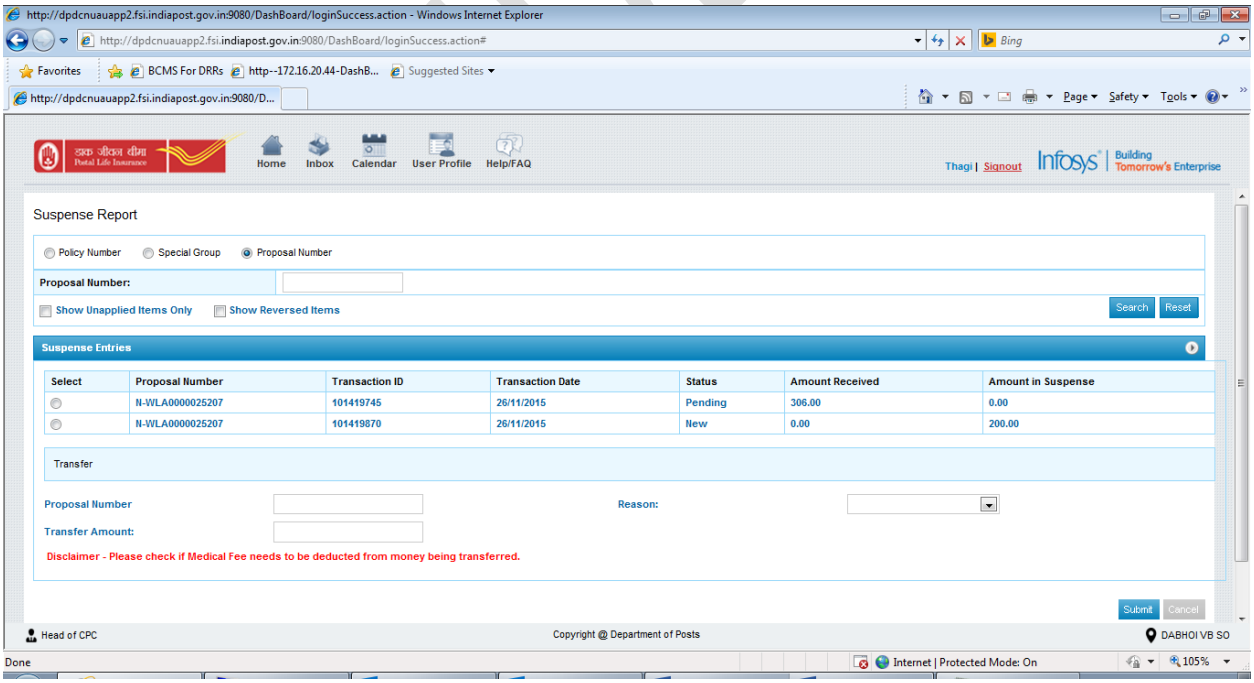
The user will then click on submit to successfully transfer the amount back to the original proposal



As seen below the amount has been successfully transferred and the remaining amount is still left on the proposal



The user can go back to the original proposal and check that the reversal successfully happened



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