

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- Proposal Number status should not be rejected or withdrawn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.

http://dpdcnuuapp2.fsi.indiapost.gov.in:9080/DashBoard/loginSuccess.action - Windows Internet Explorer

http://dpdcnuuapp2.fsi.indiapost.gov.in:9080/DashBoard/loginSuccess.action#

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http://dpdcnuuapp2.fsi.indiapost.gov.in:9080/D...

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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 Pending Disbursement. CUSTOMER SEARCH Customer Search.

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Suspense Report

☒ Policy Number ☐ Special Group ☐ Proposal Number

Policy Number Plan Name

☐ Show Unapplied Items Only ☐ Show Reversed Items

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Done Internet | Protected Mode: On 105%

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

http://dpdcnuauapp2.fsi.indiapost.gov.in:9080/DashBoard/loginSuccess.action#

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Suspense Report

☐ Policy Number ☐ Special Group ☒ Proposal Number

Proposal Number: N-WLA0000025207

☒ Show Unapplied Items Only ☐ Show Reversed Items

Search Reset

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

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Suspense Report

☐ Policy Number ☐ Special Group ☒ Proposal Number

Proposal Number: N-WLA0000025207

☒ Show Unapplied Items Only ☐ Show Reversed Items

Search Reset

Suspense Entries

Select	Proposal Number	Transaction ID	Transaction Date	Status	Amount Received	Amount in Suspense
<input type="radio"/>	N-WLA0000025207	101419745	26/11/2015	New	306.00	306.00

Transfer

Proposal Number: Reason:

Transfer Amount:

Disclaimer - Please check if Medical Fee needs to be deducted from money being transferred.

Submit Cancel

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- 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.

The screenshot shows a web browser window displaying the India Post web application. The page title is 'Suspense Report'. Below the title, there are radio buttons for 'Policy Number', 'Special Group', and 'Proposal Number'. The 'Proposal Number' is selected. Below this, there is a text input field for 'Proposal Number' and two checkboxes: 'Show Unapplied Items Only' and 'Show Reversed Items'. There are 'Search' and 'Reset' buttons. Below this is a table titled 'Suspense Entries' with the following data:

Select	Proposal Number	Transaction ID	Transaction Date	Status	Amount Received	Amount in Suspense
<input checked="" type="radio"/>	N-WLA0000025207	101419745	26/11/2015	New	306.00	306.00

Below the table is a 'Transfer' section with the following fields:

Proposal Number: Reason:

Transfer Amount:

Disclaimer - Please check if Medical Fee needs to be deducted from money being transferred.

There are 'Submit' and 'Cancel' buttons at the bottom right of the form.

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 screenshot shows a web browser window displaying the India Post dashboard. The page title is "Suspense Report". Below the title, a message reads: "Transfer - Suspense submission Successful. Transfer No. 000038". There are three radio buttons: "Policy Number", "Special Group", and "Proposal Number", with "Proposal Number" selected. Below these, there is a text input field for "Proposal Number:" which is currently empty. At the bottom of the form, there are two checkboxes: "Show Unapplied Items Only" and "Show Reversed Items", both of which are unchecked. To the right of the checkboxes are "Search" and "Reset" buttons. The dashboard also includes a navigation bar with links like Home, Inbox, Calendar, User Profile, and Help/FAQ, and a footer with copyright information and a location indicator.

- 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

This screenshot shows the same "Suspense Report" form as the previous one, but with the "Proposal Number" field filled in with the value "N-EAP0000005088". The "Policy Number" and "Special Group" radio buttons are now unselected, and "Proposal Number" remains selected. The "Search" and "Reset" buttons are still present at the bottom right of the form. The rest of the dashboard interface, including the navigation bar and footer, remains the same.

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.

http://dpdcnuuapp2.fsi.indiapost.gov.in:9080/DashBoard/loginSuccess.action - Windows Internet Explorer

http://dpdcnuuapp2.fsi.indiapost.gov.in:9080/DashBoard/loginSuccess.action#

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Suspense Report

☐ Policy Number
 ☐ Special Group
 ☒ Proposal Number

Proposal Number:

☐ Show Unapplied Items Only
 ☐ Show Reversed Items

Search Reset

Suspense Entries

Select	Proposal Number	Transaction ID	Transaction Date	Status	Amount Received	Amount in Suspense
<input type="radio"/>	N-EAP0000005089	101419795	26/11/2015	New	0.00	306.00
<input type="radio"/>	N-EAP0000005089	98351812	26/07/2014	New	1,295.00	1,295.00
<input type="radio"/>	N-EAP0000005089	99048464	11/09/2014	New	2,590.00	2,590.00

Transfer

Proposal Number:

Reason:

Transfer Amount:

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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

Check-In Confirmation
Application with Proposal Number
Please choose how to continue.
[Check in Another Application](#)

Initial Premium

Premium Details

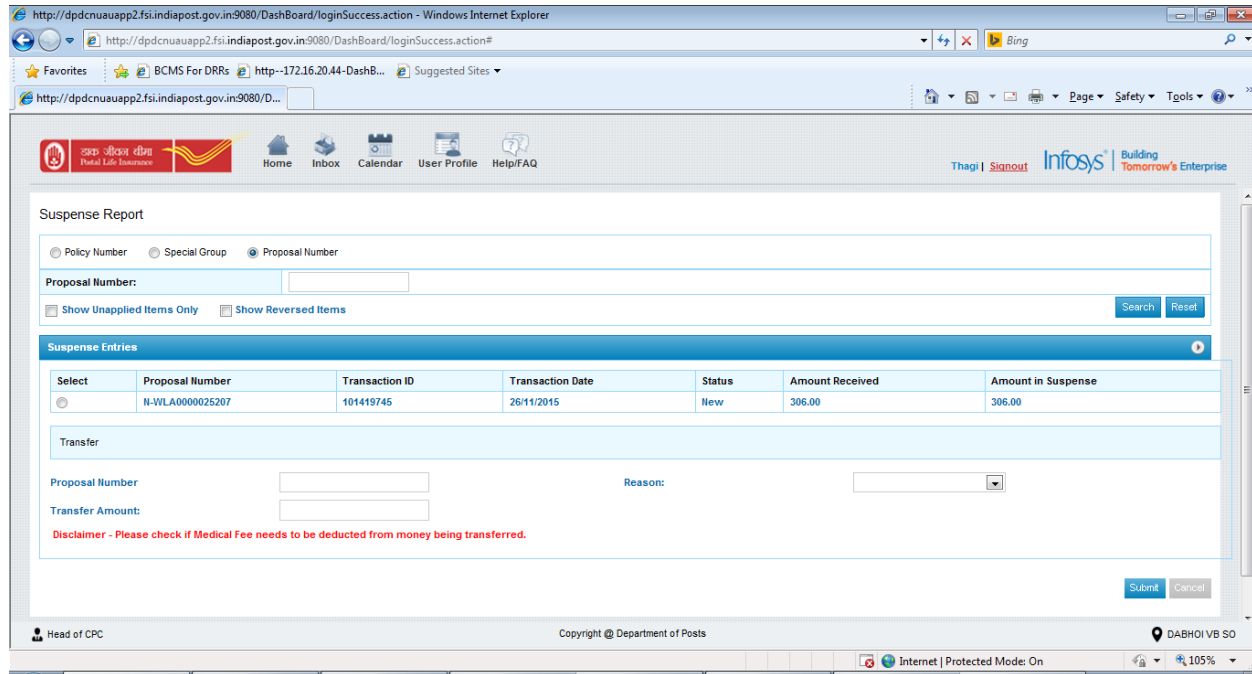
Proposal Number	Proposer Name	Agent ID	Initial Premium Deposit	Action
N-WLA0000025207	Anil Ram		306.00	
Grand Total			306	

Payment Details

Payment Mode: * ☒ Cash ☐ Cheque / Demand Draft

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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



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http://dpdcnuuapp2.fsi.indiapost.gov.in:9080/DashBoard/loginSuccess.action#

http://dpdcnuuapp2.fsi.indiapost.gov.in:9080/D...

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Suspense Report

☐ Policy Number ☐ Special Group ☒ Proposal Number

Proposal Number:

☐ Show Unapplied Items Only ☐ Show Reversed Items

Search Reset

Suspense Entries

Select	Proposal Number	Transaction ID	Transaction Date	Status	Amount Received	Amount in Suspense
<input type="radio"/>	N-WLA0000025207	101419745	26/11/2015	New	306.00	306.00

Transfer

Proposal Number:

Reason:

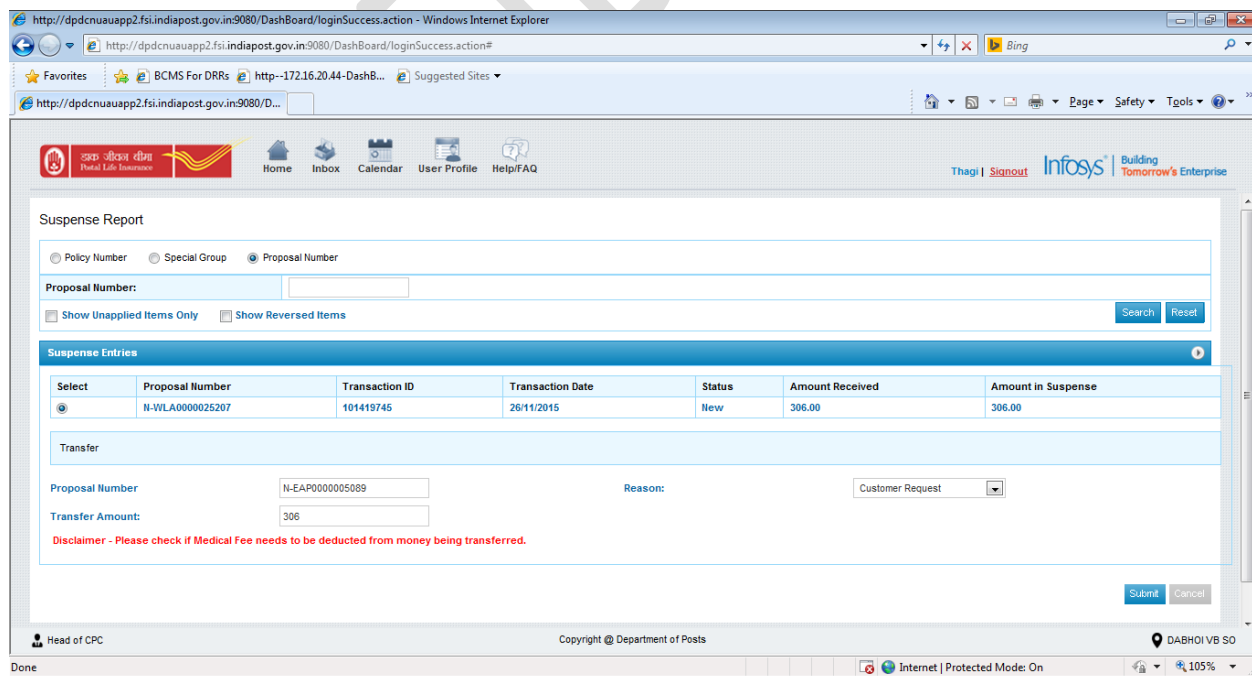
Transfer Amount:

Disclaimer - Please check if Medical Fee needs to be deducted from money being transferred.

Submit Cancel

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



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http://dpdcnuuapp2.fsi.indiapost.gov.in:9080/DashBoard/loginSuccess.action#

http://dpdcnuuapp2.fsi.indiapost.gov.in:9080/D...

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Suspense Report

☐ Policy Number ☐ Special Group ☒ Proposal Number

Proposal Number:

☐ Show Unapplied Items Only ☐ Show Reversed Items

Search Reset

Suspense Entries

Select	Proposal Number	Transaction ID	Transaction Date	Status	Amount Received	Amount in Suspense
<input checked="" type="radio"/>	N-WLA0000025207	101419745	26/11/2015	New	306.00	306.00

Transfer

Proposal Number:

Reason:

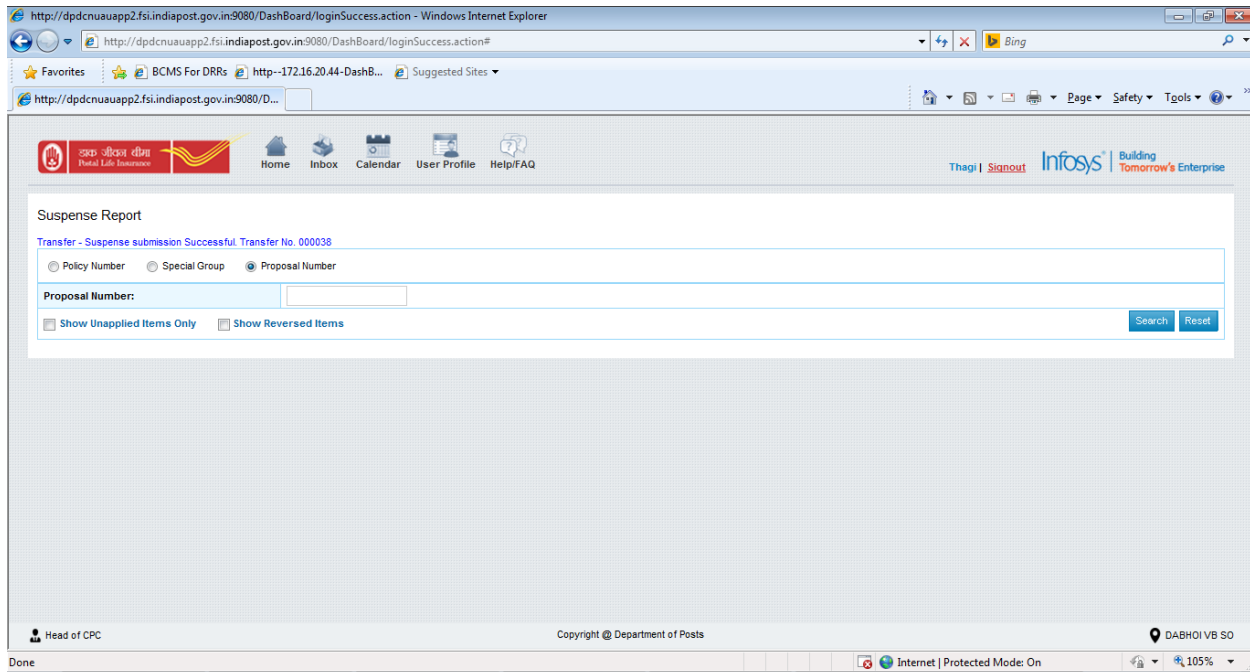
Transfer Amount:

Disclaimer - Please check if Medical Fee needs to be deducted from money being transferred.

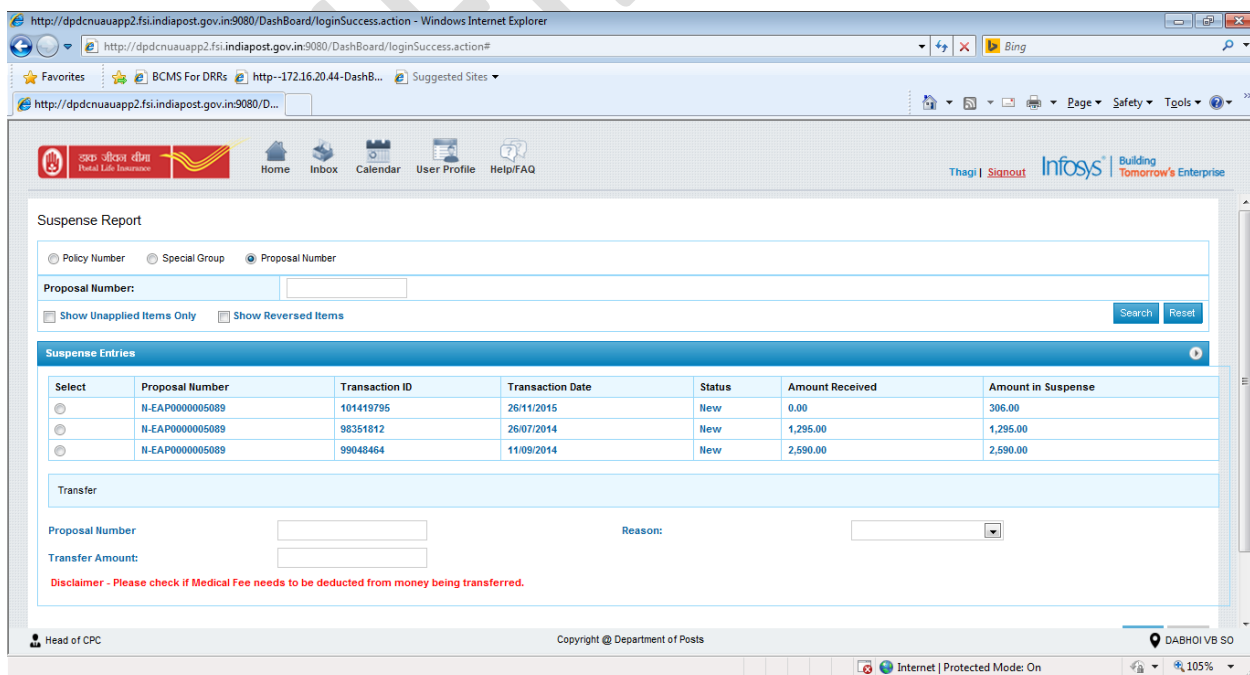
Submit Cancel

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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 screenshot shows a web browser window displaying the India Post web application. The page title is "http://dpdcnuuapp2.fsi.indiapost.gov.in:9080/DashBoard/loginSuccess.action - Windows Internet Explorer". The page contains a navigation bar with links like Home, Inbox, Calendar, User Profile, and Help/FAQ. Below the navigation bar, there is a section for "Suspense Entries" which includes a table with columns: Select, Proposal Number, Transaction ID, Transaction Date, Status, Amount Received, and Amount in Suspense. The table has three rows of data. Below the table, there is a "Transfer" form with fields for "Proposal Number" (containing "N-WLA0000025207"), "Reason" (containing "Data Entry"), and "Transfer Amount" (containing "200"). There is also a "Disclaimer" message: "Disclaimer - Please check if Medical Fee needs to be deducted from money being transferred." and buttons for "Submit" and "Cancel".

Select	Proposal Number	Transaction ID	Transaction Date	Status	Amount Received	Amount in Suspense
<input type="radio"/>	N-EAP0000005089	101419795	26/11/2015	New	0.00	306.00
<input type="radio"/>	N-EAP0000005089	98351812	26/07/2014	New	1,295.00	1,295.00
<input type="radio"/>	N-EAP0000005089	99048464	11/09/2014	New	2,590.00	2,590.00

Transfer

Proposal Number: N-WLA0000025207 Reason: Data Entry

Transfer Amount: 200

Disclaimer - Please check if Medical Fee needs to be deducted from money being transferred.

Submit Cancel

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

The screenshot shows the "Suspense Report" page in the India Post web application. The page title is "http://dpdcnuuapp2.fsi.indiapost.gov.in:9080/DashBoard/loginSuccess.action - Windows Internet Explorer". The page contains a navigation bar with links like Home, Inbox, Calendar, User Profile, and Help/FAQ. Below the navigation bar, there is a section for "Suspense Report" which includes a message: "Transfer - Suspense submission Successful. Transfer No. 000039". There are radio buttons for "Policy Number", "Special Group", and "Proposal Number". Below these, there is a "Proposal Number" field and buttons for "Search" and "Reset". There are also checkboxes for "Show Unapplied Items Only" and "Show Reversed Items".

Suspense Report

Transfer - Suspense submission Successful. Transfer No. 000039

☐ Policy Number ☐ Special Group ☒ Proposal Number

Proposal Number: [Field]

Show Unapplied Items Only Show Reversed Items

Search Reset

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

Suspense Report

Policy Number Special Group **Proposal Number**

Proposal Number:

☐ Show Unapplied Items Only ☐ Show Reversed Items Search Reset

Suspense Entries

Select	Proposal Number	Transaction ID	Transaction Date	Status	Amount Received	Amount in Suspense
<input type="radio"/>	N-EAP000005089	101419795	26/11/2015	New	0.00	106.00
<input type="radio"/>	N-EAP000005089	98351812	26/07/2014	New	1,295.00	1,295.00
<input type="radio"/>	N-EAP000005089	99048464	11/09/2014	New	2,590.00	2,590.00

Transfer

Proposal Number: Reason:

Transfer Amount:

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

Suspense Report

Policy Number Special Group **Proposal Number**

Proposal Number:

☐ Show Unapplied Items Only ☐ Show Reversed Items Search Reset

Suspense Entries

Select	Proposal Number	Transaction ID	Transaction Date	Status	Amount Received	Amount in Suspense
<input type="radio"/>	N-WLA0000025207	101419745	26/11/2015	Pending	306.00	0.00
<input type="radio"/>	N-WLA0000025207	101419870	26/11/2015	New	0.00	200.00

Transfer

Proposal Number: Reason:

Transfer Amount:

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Submit Cancel

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