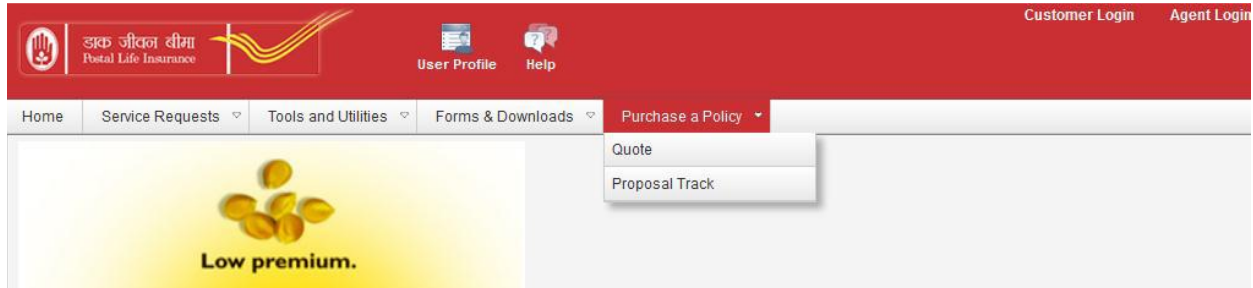# Process Document for Customer Portal Proposals

Step 1: The screenshot below shows the PLI site's Home page where a new or existing customer can purchase a policy by submitting a proposal

Step 2: Quote and application screen will appear as follows

Step 3: Customer need to fill the required details and pay the initial premium.

After paying premium, submit the proposal.
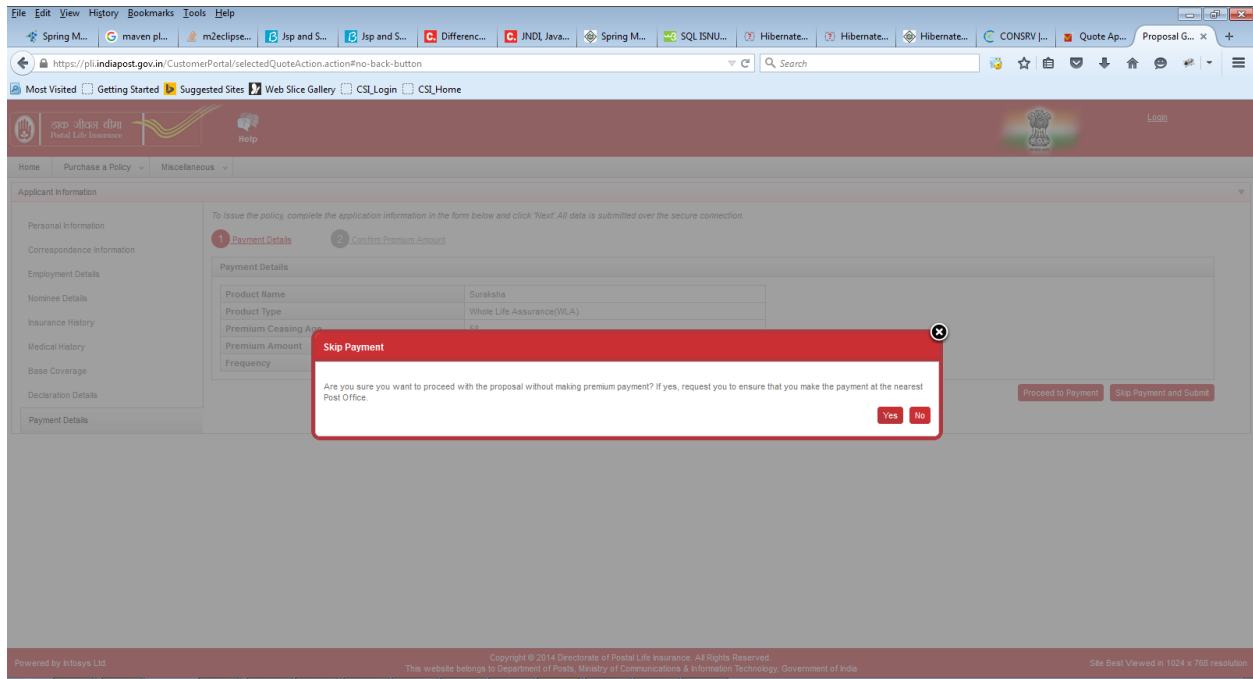
Proposal number will generate:
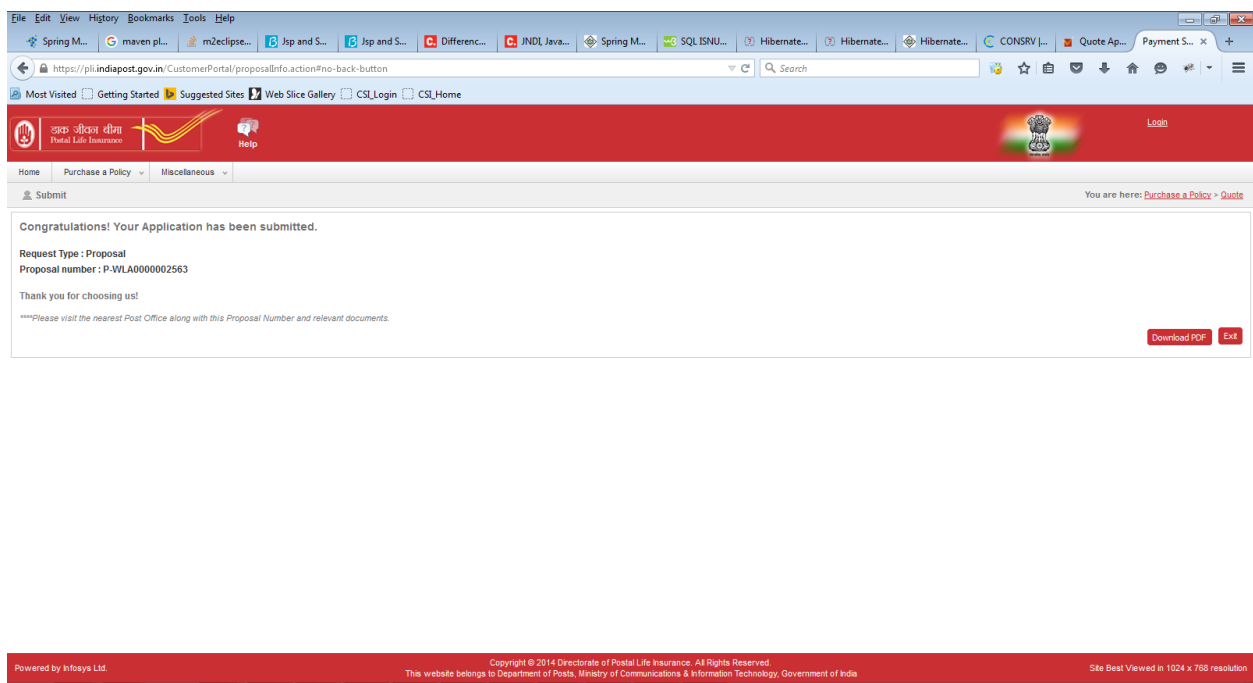
Step 4:

After all the required details are filled and initial premium paid, customer need to print the form and submit it at PO/CPC.

Step 5:

AT PO/CPC, request needs to be indexed using the tab New Business Indexing-Application-Portal proposal Indexing:
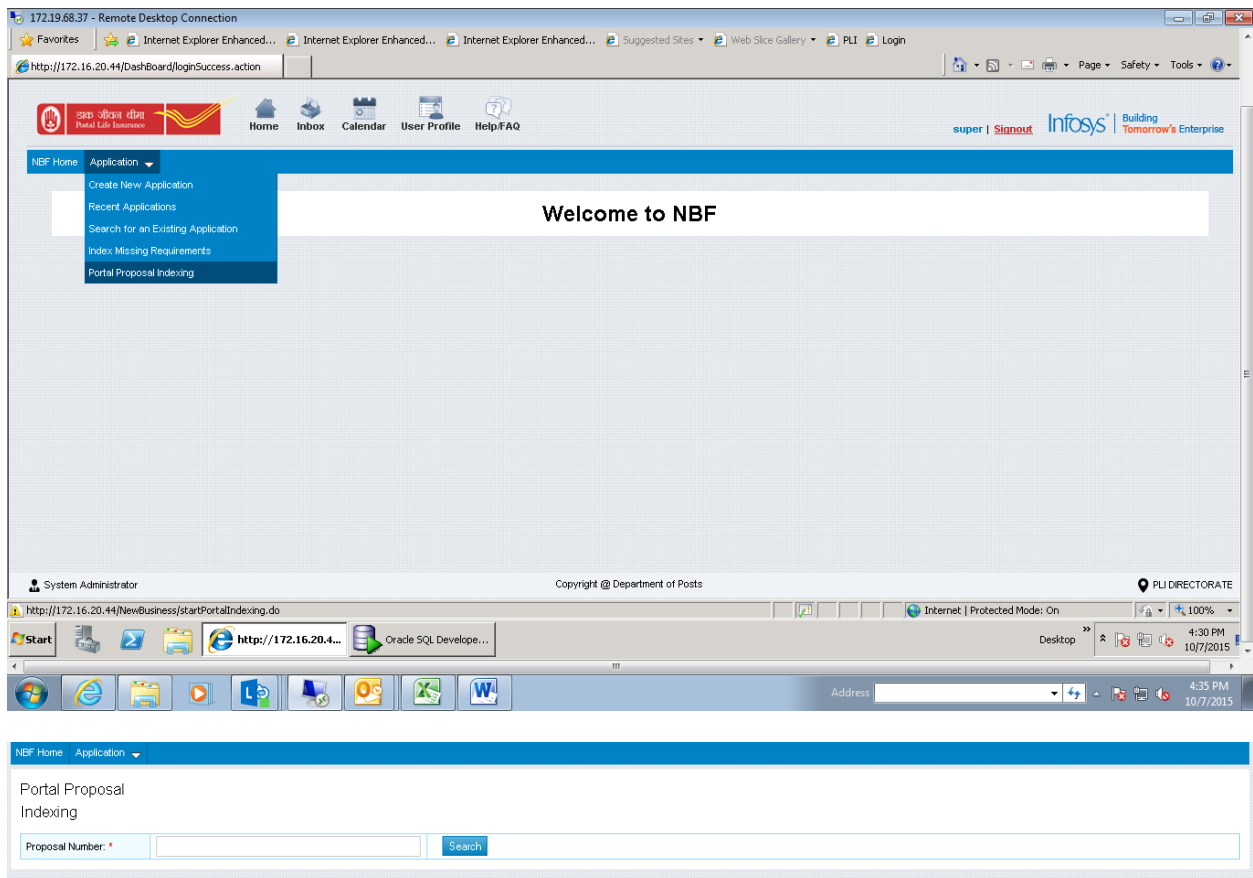
Once indexing is done, request will move to ECMS and will reflect in Mccamish.

Step 5:

Indexed Request will reflect in Daily Request Indexed report. And further status can be tracked through Service Index Stage Report.

Process when Policy Service Request is submitted through Customer Portal

Step 1: Policy service request can be submitted by customer using Customer Portal.

On submission of each request, a request ID is generated along with an Acknowledgement message.
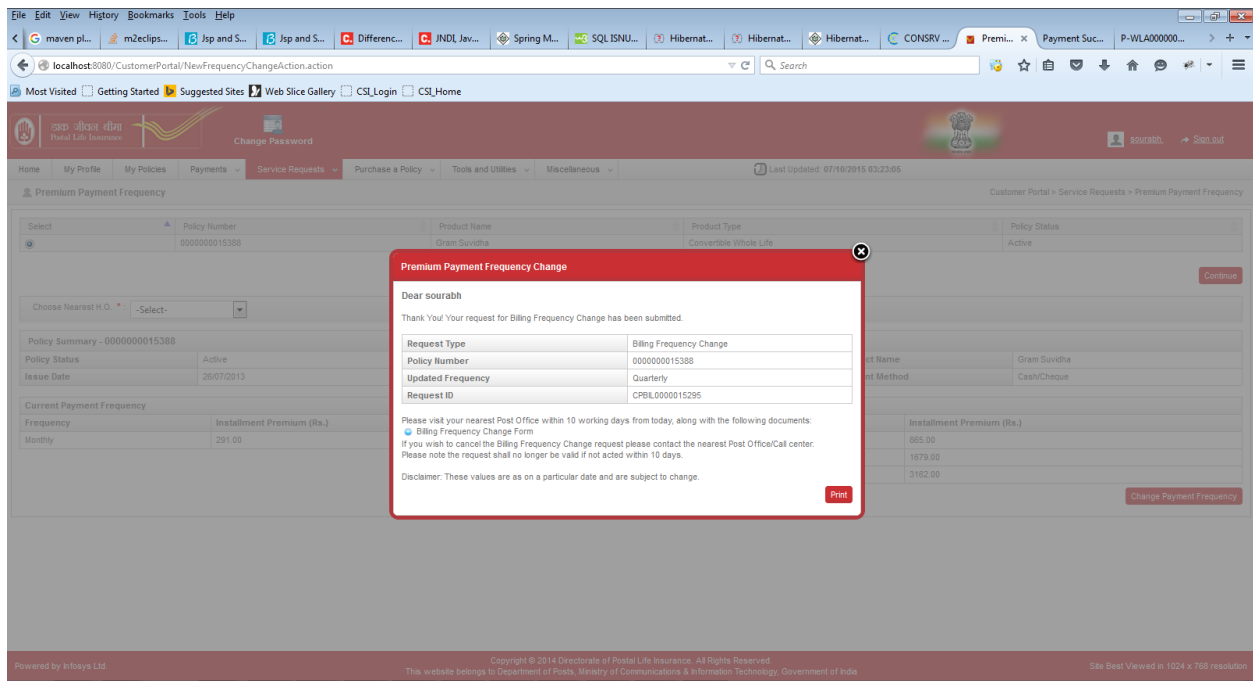
The Acknowledgement message describes the documents required for that service request and maximum time in days before which a customer needs to visit the Post Office.

Step 2: Customer has to visit nearest branch along with required documents within the Turnaround Time mentioned in the Acknowledgement message.

Step 3: AT PO/CPC, request needs to be indexed using the tab service-request indexing-customer portal request

Service Request Indexing

Request Type * [Customer Portal Requests ▼]   Policy Number * [🔍]   Ticket ID / Proposal Number [   ]
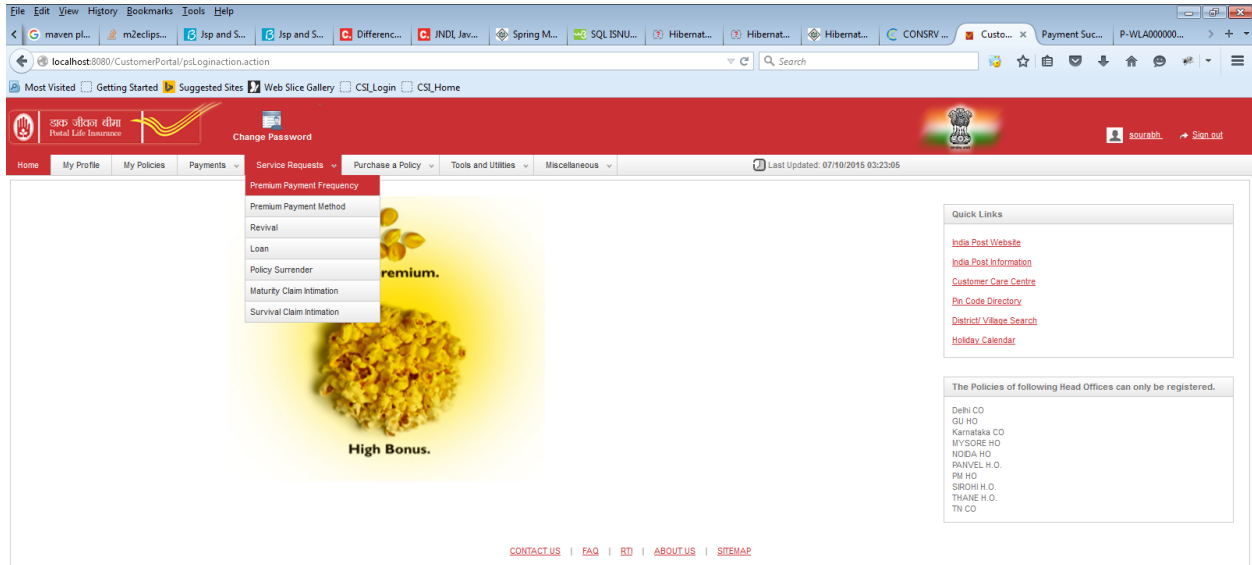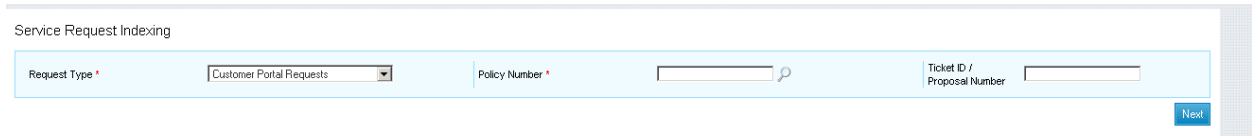
[Next]

Once indexing is done, request will move to ECMS and will reflect in Mccamish.

Step 4:

Indexed Request will reflect in Daily Request Indexed report. And further status can be tracked through Service Index Stage Report.