

DEPARTMENT OF POSTS  
MINISTRY OF COMMUNICATIONS & IT  
GOVERNMENT OF INDIA

Business Process Document

Proposal Transfer

Submitted by

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India

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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- Proposal Number status should not be rejected or withdrawn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://dpdcnuaapp2.fsi.indiapost.gov.in:9080/DashBoard/loginSuccess.action - Windows Internet Explorer

Favorites BCMS For DRRs http://dpdcnuaapp2.fsi.indiapost.gov.in:9080/DashBoard/loginSuccess.action# Suggested Sites ▾

http://dpdcnuaapp2.fsi.indiapost.gov.in:9080/D... □

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	Product Information	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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http://dpdcnuaapp2.fsi.indiapost.gov.in:9080/DashBoard/loginSuccess.action - Windows Internet Explorer

Favorites BCMS For DRRs http://dpdcnuaapp2.fsi.indiapost.gov.in:9080/DashBoard/loginSuccess.action# Suggested Sites ▾

http://dpdcnuaapp2.fsi.indiapost.gov.in:9080/D... □

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Suspense Report

Policy Number  Special Group  Proposal Number

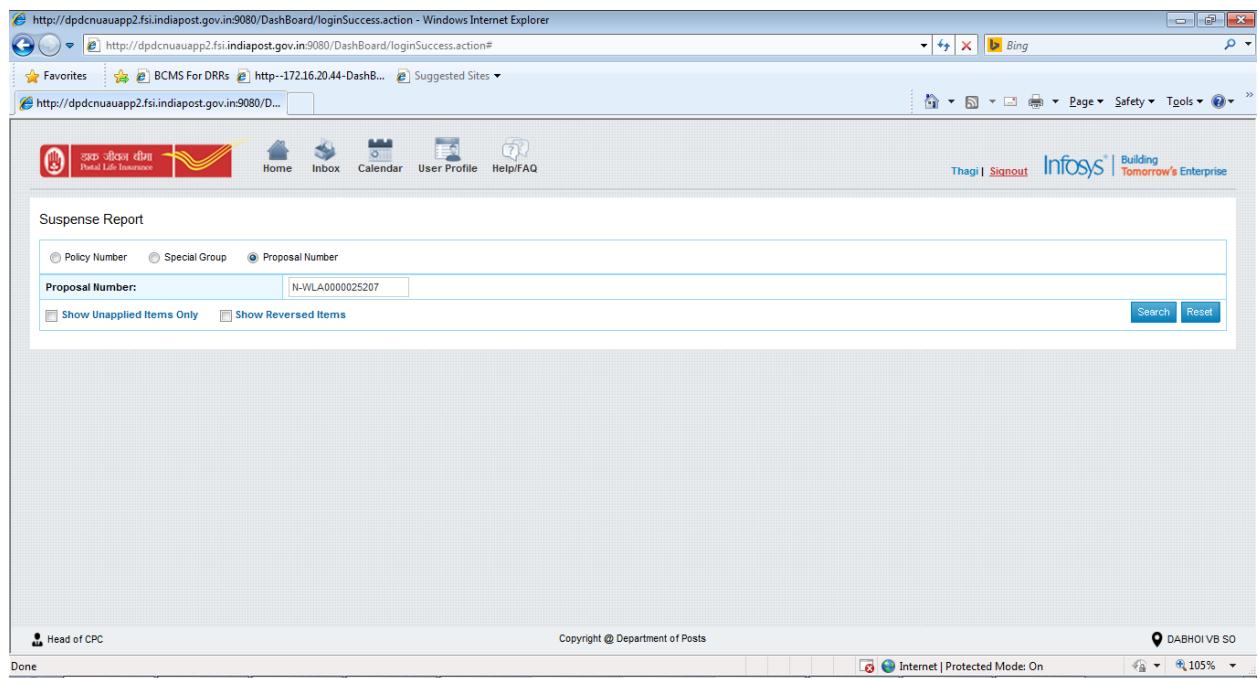
Policy Number  Plan Name

Show Unapplied Items Only  Show Reversed Items

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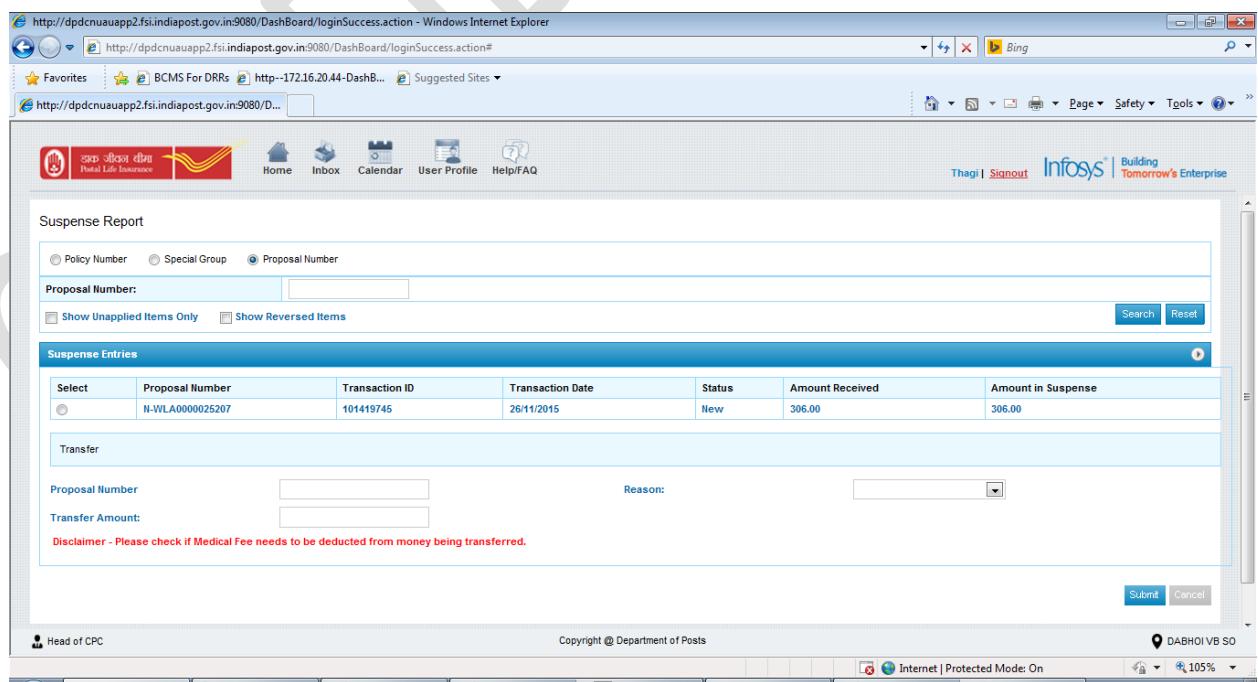
Done Internet | Protected Mode: On 105%

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



The screenshot shows a Windows Internet Explorer window with the URL <http://dpdcnuaapp2.fsi.indiapost.gov.in:9080/DashBoard/loginSuccess.action>. The page title is "Suspense Report". There are three radio buttons: "Policy Number" (selected), "Special Group", and "Proposal Number". Below them is a text input field labeled "Proposal Number" containing "N-WLA0000025207". At the bottom right are "Search" and "Reset" buttons.

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

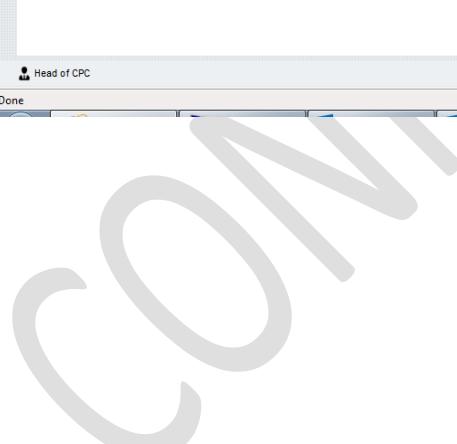


The screenshot shows the same "Suspense Report" page. The "Suspense Entries" section contains a table with one row:

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 fields for "Proposal Number" and "Transfer Amount". A red disclaimer at the bottom states: "Disclaimer - Please check if Medical Fee needs to be deducted from money being transferred." At the bottom right are "Submit" and "Cancel" buttons.

- 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.



Screenshot of the India Post Suspense Report application interface:

The URL in the browser is <http://dpdcnuaapp2.fsi.indiapost.gov.in:9080/DashBoard/loginSuccess.action>.

The page title is "Suspense Report".

Filter options at the top include "Policy Number", "Special Group", and "Proposal Number".

The "Proposal Number" field contains "N-WLA0000025207".

Checkboxes for "Show Unapplied Items Only" and "Show Reversed Items" are present.

A "Search" button and a "Reset" button are located on the right.

The "Suspense Entries" table shows one row:

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

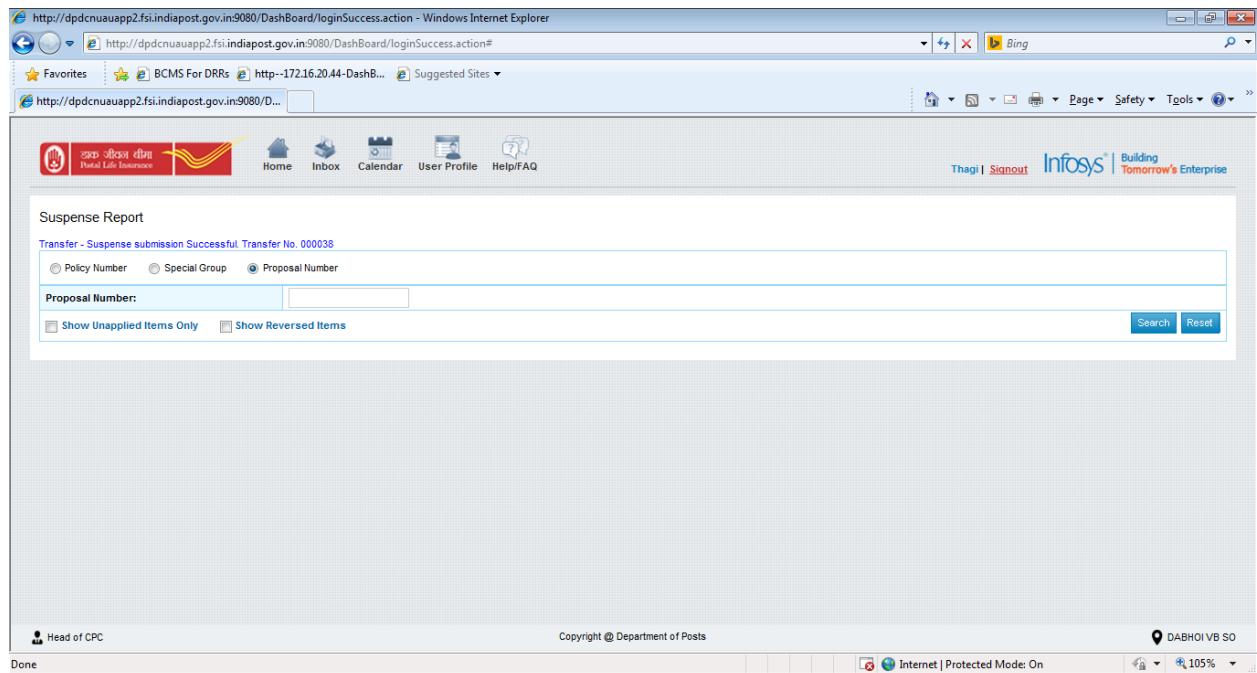
A "Transfer" section is visible, containing fields for "Proposal Number" (N-EAP000005089), "Transfer Amount" (306), and "Reason" (Customer Request).

A red disclaimer at the bottom states: "Disclaimer - Please check if Medical Fee needs to be deducted from money being transferred."

Buttons for "Submit" and "Cancel" are at the bottom right.

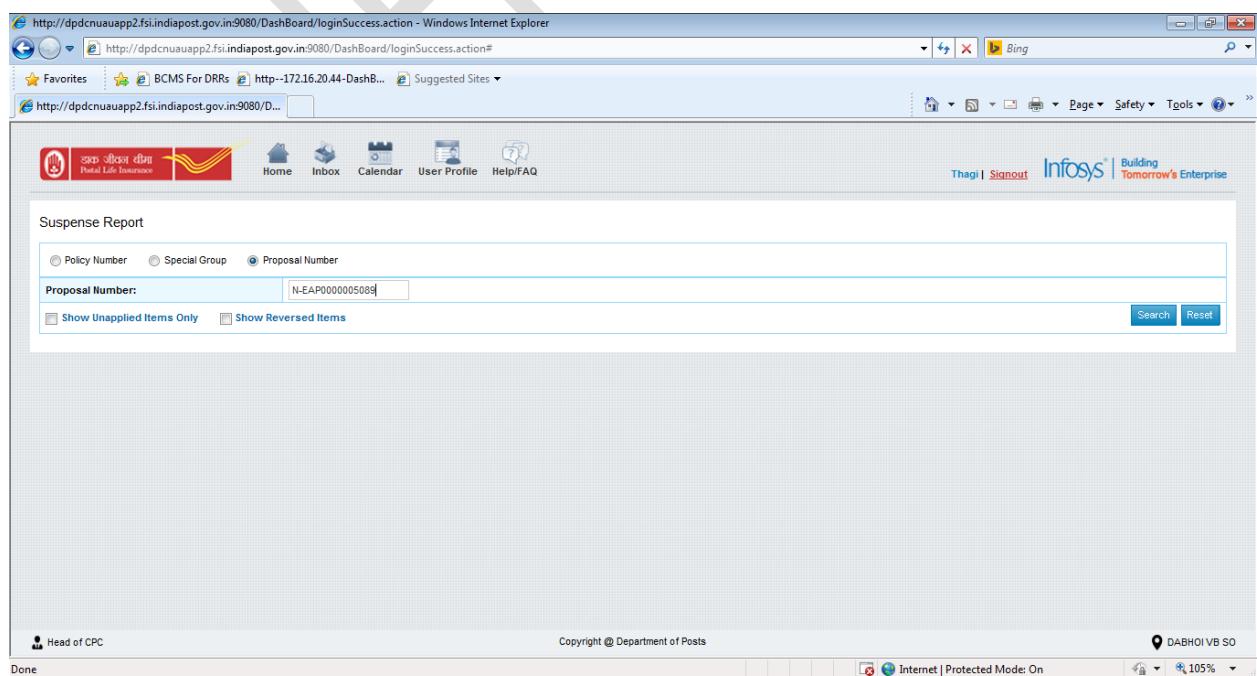
Page footer includes "Head of CPC", "Copyright © Department of Posts", "DABHOI VB SO", and "Internet | Protected Mode: On".

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.



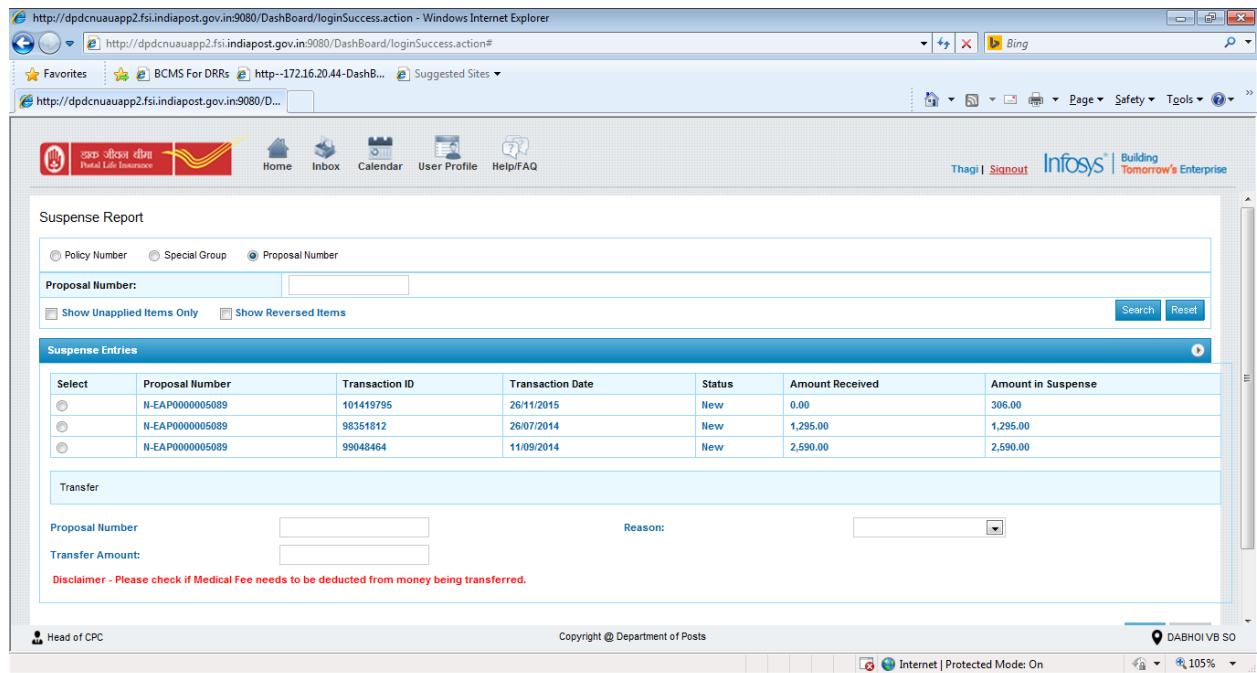
The screenshot shows a Windows Internet Explorer window with the URL <http://dpdcnuaapp2.fsi.indiapost.gov.in:9080/DashBoard/loginSuccess.action>. The page title is "Suspense Report". A success message "Transfer - Suspense submission Successful. Transfer No. 000038" is displayed. Below it, there are radio buttons for "Policy Number", "Special Group", and "Proposal Number", with "Proposal Number" selected. A text input field contains the proposal number "000038". There are also checkboxes for "Show Unapplied Items Only" and "Show Reversed Items", both of which are unchecked. At the bottom right are "Search" and "Reset" buttons. The top navigation bar includes links for Home, Inbox, Calendar, User Profile, and Help/FAQ. The Infosys logo is visible in the top right corner.

- 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 screenshot shows a Windows Internet Explorer window with the URL <http://dpdcnuaapp2.fsi.indiapost.gov.in:9080/DashBoard/loginSuccess.action>. The page title is "Suspense Report". A success message "Transfer - Suspense submission Successful. Transfer No. N-EAP000005089" is displayed. Below it, there are radio buttons for "Policy Number", "Special Group", and "Proposal Number", with "Proposal Number" selected. A text input field contains the proposal number "N-EAP000005089". There are also checkboxes for "Show Unapplied Items Only" and "Show Reversed Items", both of which are unchecked. At the bottom right are "Search" and "Reset" buttons. The top navigation bar includes links for Home, Inbox, Calendar, User Profile, and Help/FAQ. The Infosys logo is visible in the top right corner.

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.



Suspense Report

Policy Number   Special Group   Proposal Number

Proposal Number:

Show Unapplied Items Only    Show Reversed Items  

Select	Proposal Number	Transaction ID	Transaction Date	Status	Amount Received	Amount in Suspense
<input type="radio"/>	N-EAP0000005009	101419795	26/11/2015	New	0.00	306.00
<input type="radio"/>	N-EAP0000005009	98351812	26/07/2014	New	1,295.00	1,295.00
<input type="radio"/>	N-EAP0000005009	99048464	11/09/2014	New	2,590.00	2,590.00

**Transfer**

Proposal Number:  Reason:

Transfer Amount:

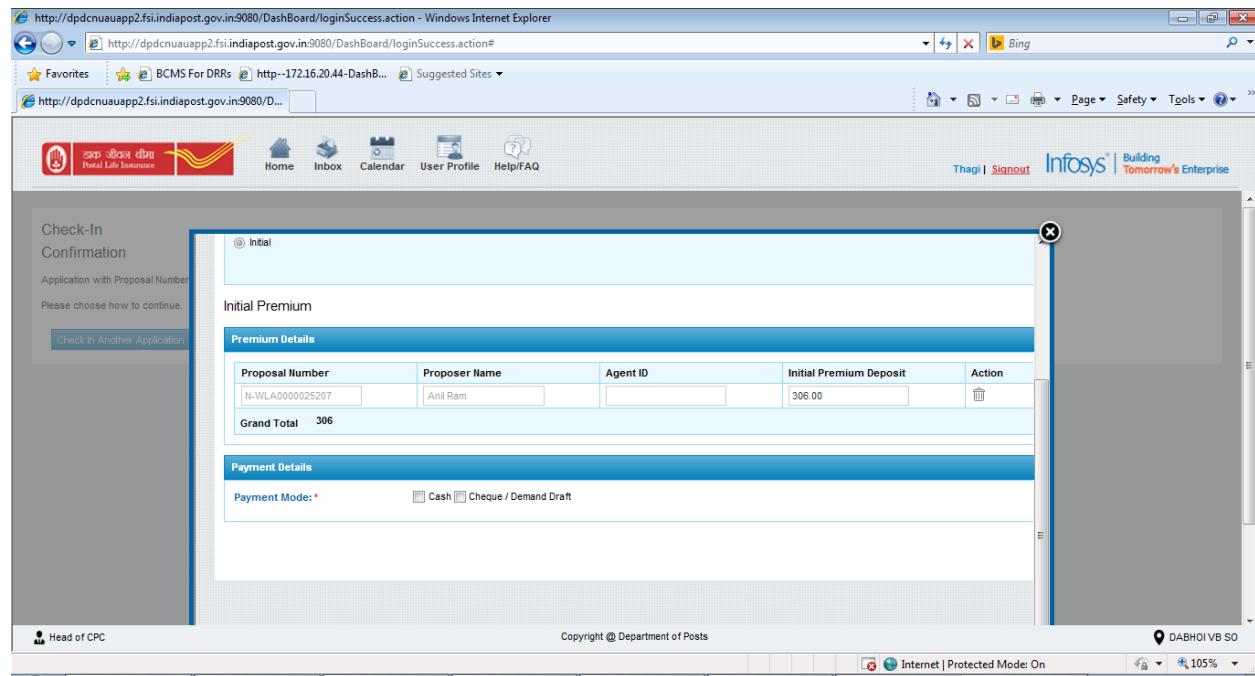
Disclaimer - Please check if Medical Fee needs to be deducted from money being transferred.

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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



http://dpdcnuaapp2.fsi.indiapost.gov.in:9080/DashBoard/loginSuccess.action - Windows Internet Explorer

http://dpdcnuaapp2.fsi.indiapost.gov.in:9080/DashBoard/loginSuccess.action#

Favorites BCMS For DRRs http://172.16.20.44-DashB... Suggested Sites

http://dpdcnuaapp2.fsi.indiapost.gov.in:9080/D...

Home Inbox Calendar User Profile Help/FAQ Thagi | Signout Infosys® Building Tomorrow's Enterprise

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

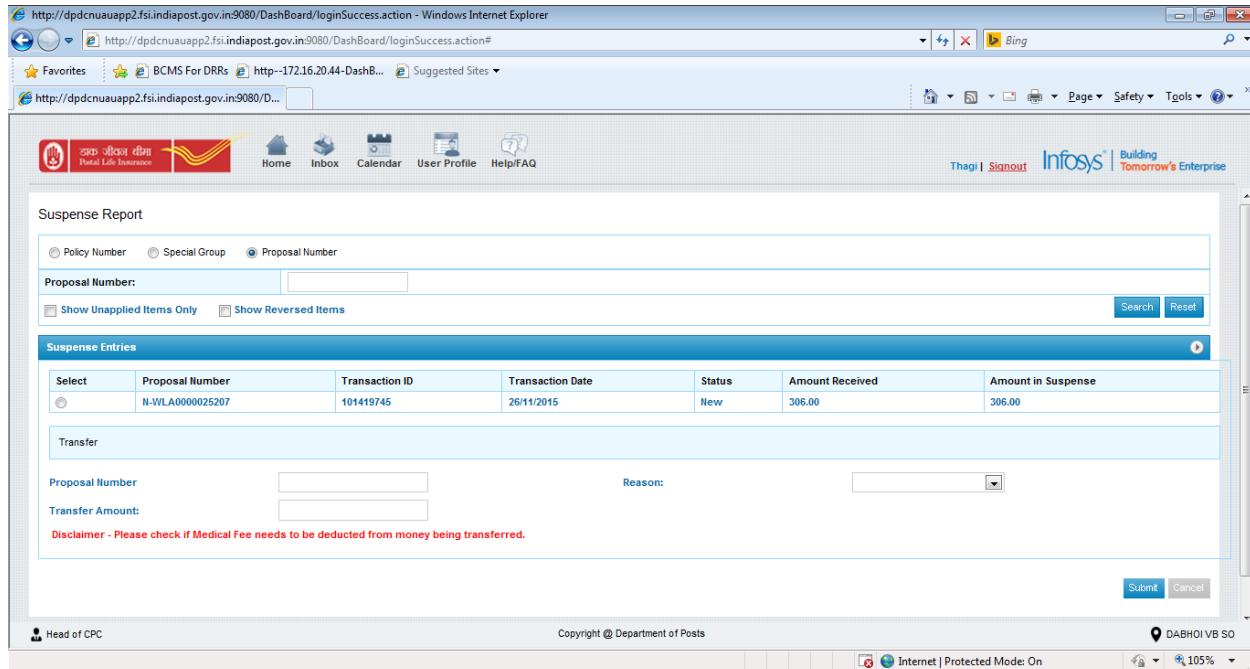
Payment Details

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



Suspense Report

( Policy Number) ( Special Group) ( Proposal Number)

Proposal Number:

Show Unapplied Items Only  Show Reversed Items

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:

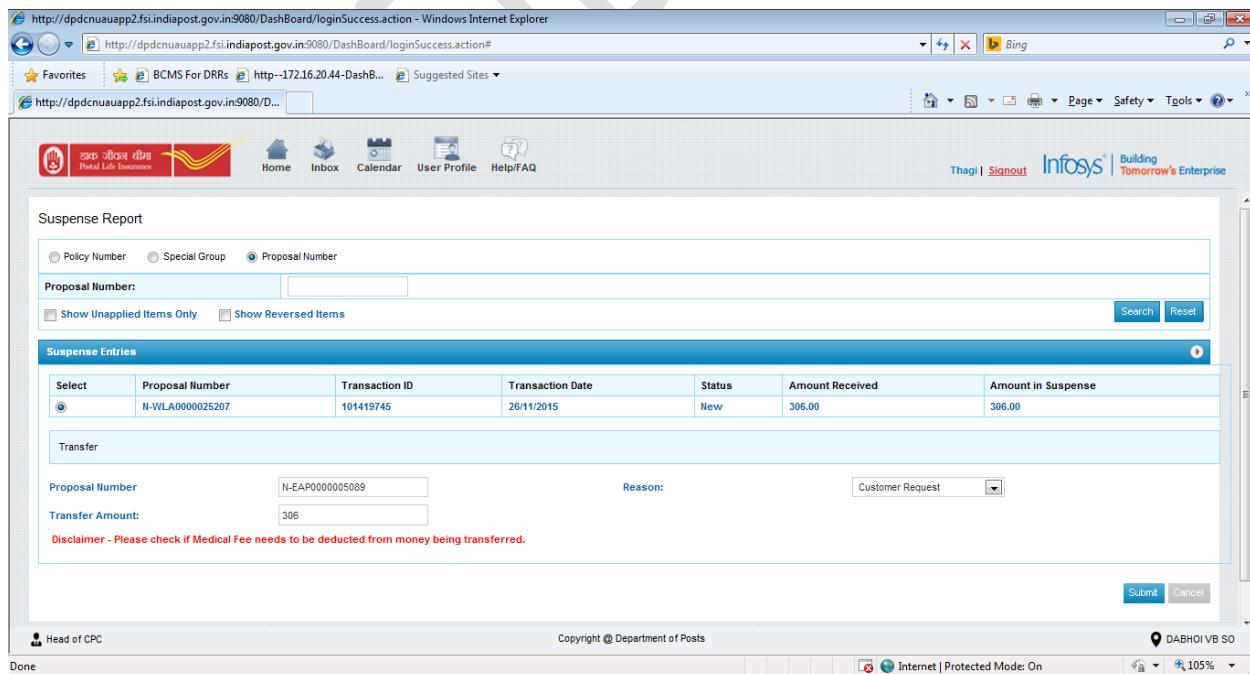
Transfer Amount:

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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



Suspense Report

( Policy Number) ( Special Group) ( Proposal Number)

Proposal Number:

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: N-EAP000005089 Reason: Customer Request

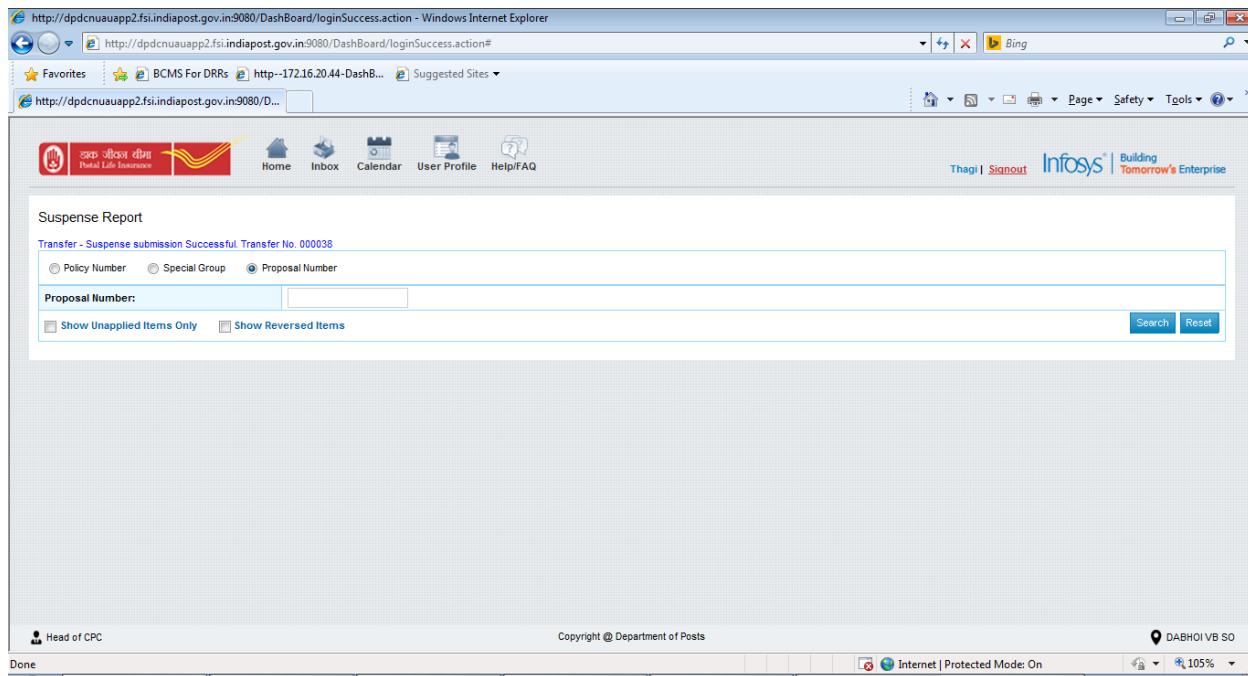
Transfer Amount: 306

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

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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



Suspense Report

Transfer - Suspense submission Successful. Transfer No. 000038

( Policy Number    Special Group    Proposal Number)

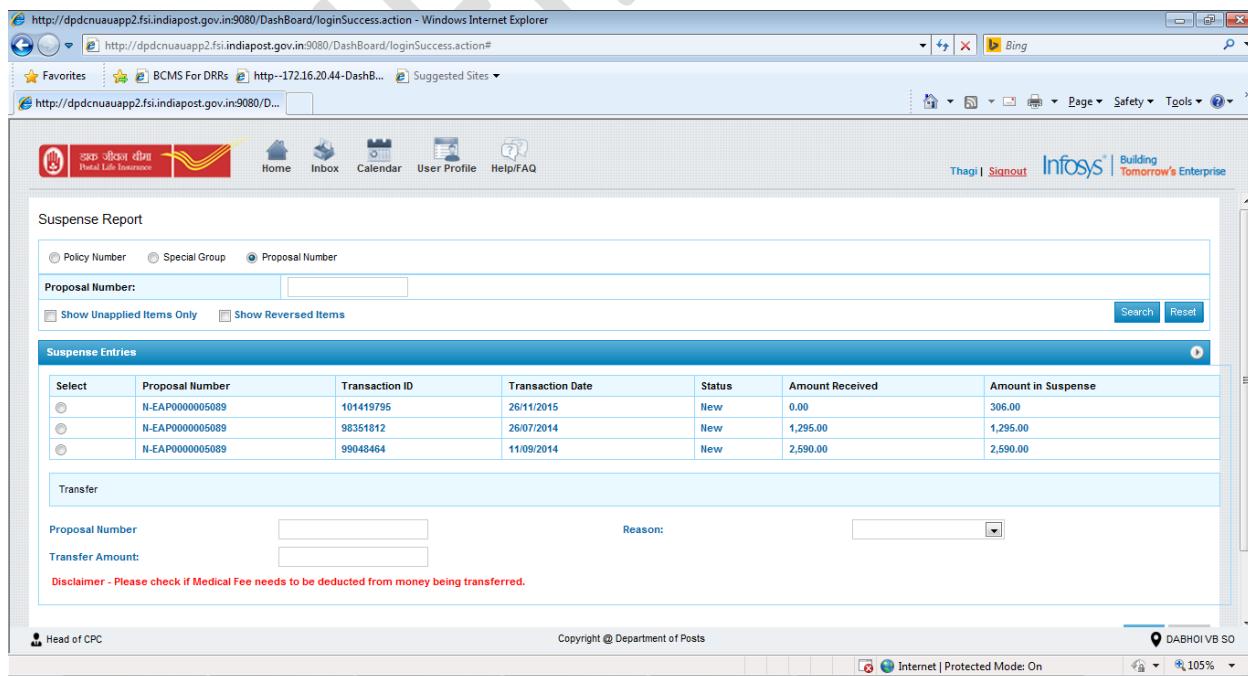
Proposal Number:

Show Unapplied Items Only    Show Reversed Items

Search   Reset

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- 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



Suspense Report

( Policy Number    Special Group    Proposal Number)

Proposal Number:

Show Unapplied Items Only    Show Reversed Items

**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:

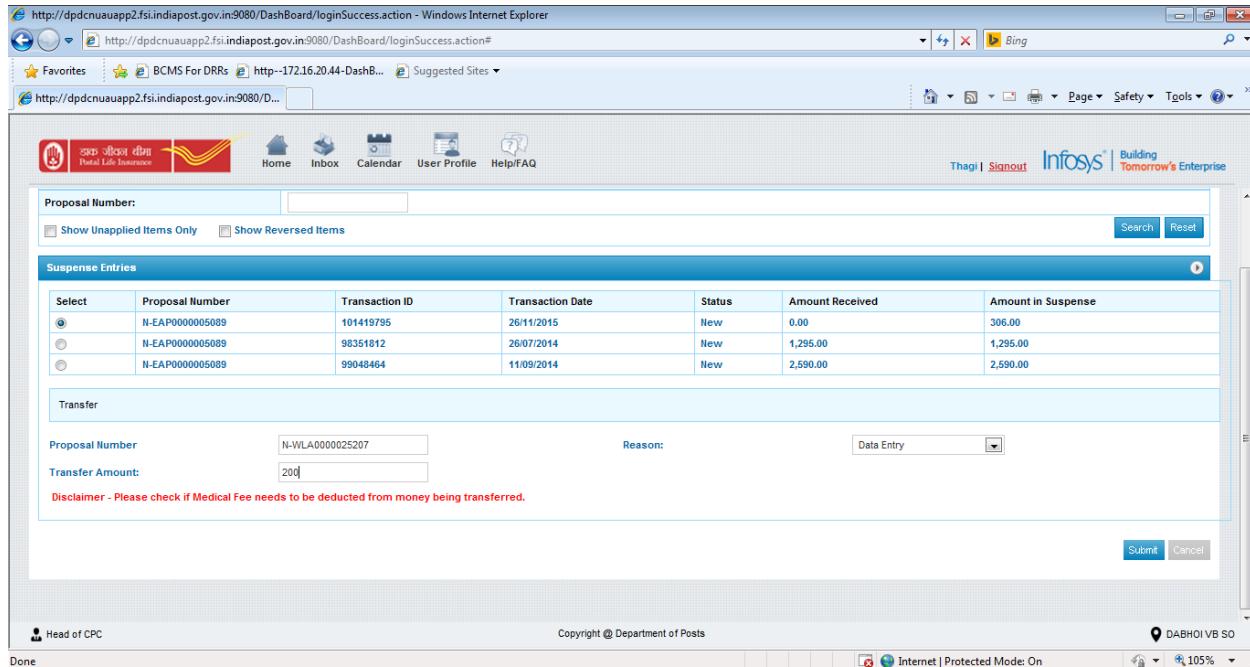
Reason:

Transfer Amount:

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- 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 Windows Internet Explorer window for the India Post application. The URL is <http://dpdcnuaapp2.fsi.indiapost.gov.in:9080/DashBoard/loginSuccess.action>. The page displays a 'Suspense Entries' table with three rows of data. Below the table is a 'Transfer' section where a proposal number is entered as 'N-WLA0000025207'. The status bar at the bottom indicates 'DABHOI VB SO'.

Select	Proposal Number	Transaction ID	Transaction Date	Status	Amount Received	Amount in Suspense
<input checked="" type="radio"/>	N-EAP000005089	101419795	26/11/2015	New	0.00	306.00
<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**

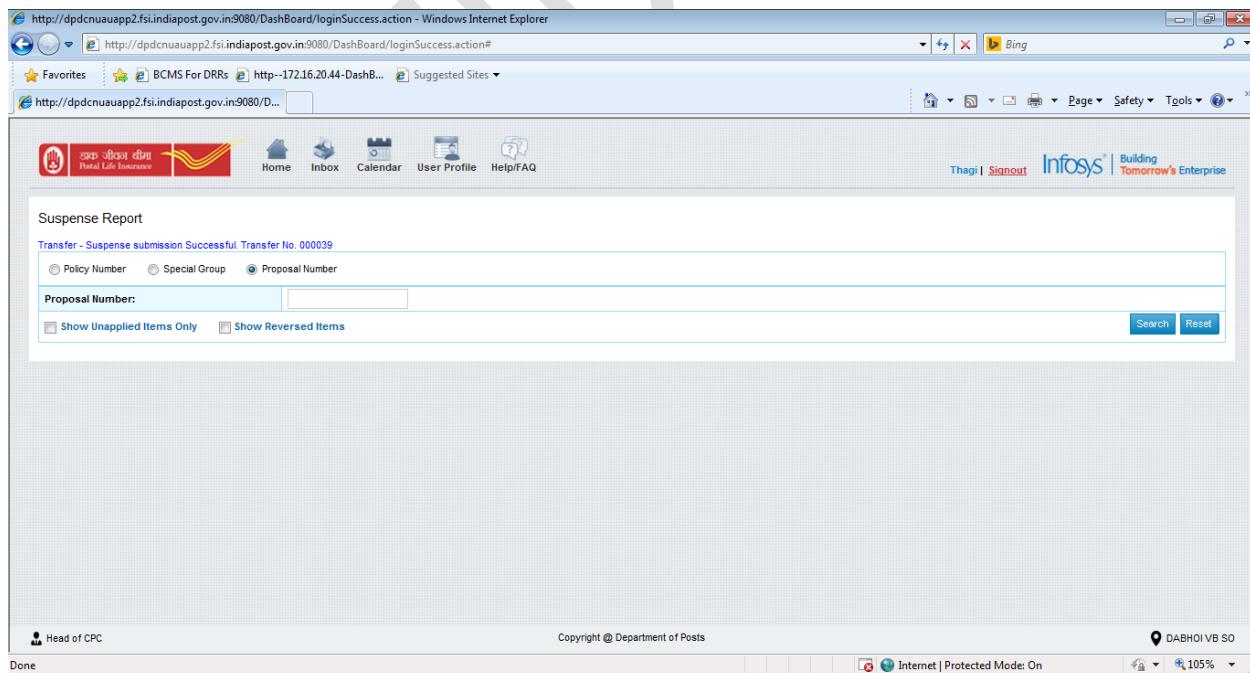
Proposal Number: N-WLA0000025207      Reason: Data Entry

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 a Windows Internet Explorer window for the India Post application. The URL is <http://dpdcnuaapp2.fsi.indiapost.gov.in:9080/DashBoard/loginSuccess.action>. The page displays a 'Suspense Report' message: 'Transfer - Suspense submission Successful. Transfer No. 000039'. Below this message is a table with a single row. The status bar at the bottom indicates 'DABHOI VB SO'.

<input type="radio"/> Policy Number <input type="radio"/> Special Group <input checked="" type="radio"/> Proposal Number
Proposal Number: <input type="text"/>
<input type="checkbox"/> Show Unapplied Items Only <input type="checkbox"/> Show Reversed Items

**Suspense Report**

Transfer - Suspense submission Successful. Transfer No. 000039

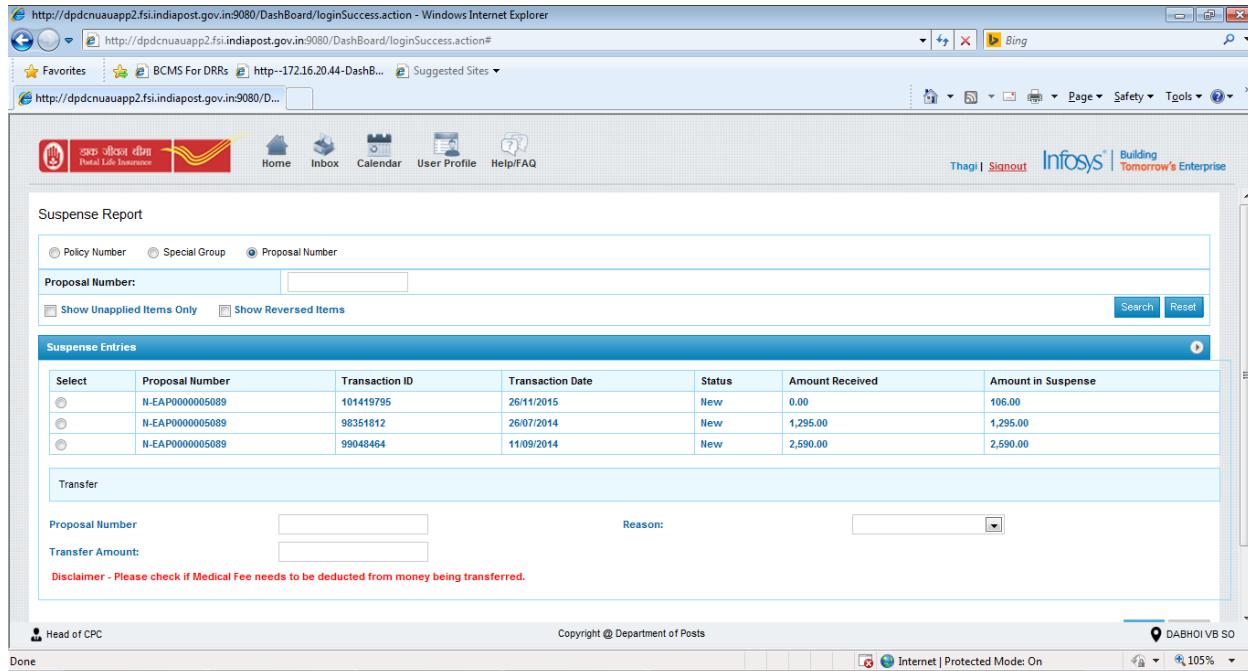
Policy Number     Special Group     Proposal Number

Proposal Number:

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

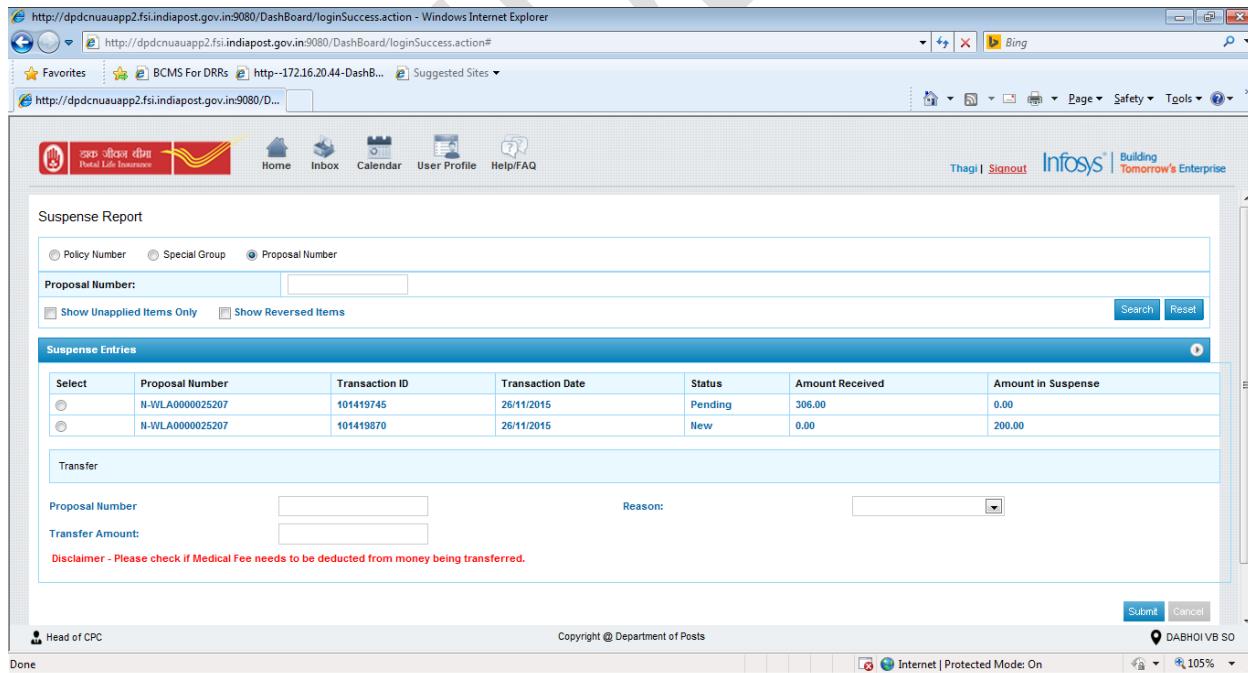


The screenshot shows the India Post Suspense Report interface. In the 'Suspense Entries' table, three proposals are listed:

Select	Proposal Number	Transaction ID	Transaction Date	Status	Amount Received	Amount in Suspense
<input checked="" type="radio"/>	N-EAP0000005089	101419795	26/11/2015	New	0.00	106.00
<input checked="" type="radio"/>	N-EAP0000005089	98351812	26/07/2014	New	1,295.00	1,295.00
<input checked="" type="radio"/>	N-EAP0000005089	99048464	11/09/2014	New	2,590.00	2,590.00

Below the table, there is a 'Transfer' section with fields for 'Proposal Number', 'Reason', and 'Transfer Amount'. A red disclaimer at the bottom states: "Disclaimer - Please check if Medical Fee needs to be deducted from money being transferred."

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



The screenshot shows the India Post Suspense Report interface. In the 'Suspense Entries' table, two proposals are listed:

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

Below the table, there is a 'Transfer' section with fields for 'Proposal Number', 'Reason', and 'Transfer Amount'. A red disclaimer at the bottom states: "Disclaimer - Please check if Medical Fee needs to be deducted from money being transferred."

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