India Post

Postal Life Insurance

Application Training Program

Letters and Reports Operating Manual

भारतीय डाक

India Post

Table of Contents

Executive Summary

About the Manual

India Post, Government of India, has implemented the McCamish application to improve and automate the existing Postal Life Insurance services. In this regard, Postal Officers must follow new processes and use the new system to deal with reports and letters. This document will support Postal Officers to deal with reports and letters with respect to Postal Life Insurance and Rural Postal Life Insurance policies.

This manual contains the following sections:

1	• Introduction to Letters and Reports
2	• Letters and Reports – Formats
3	• Getting Started with Processing Letters and Reports
4	• Processing Letters
5	• Processing Reports

Scope of the Document

This document will teach users how to process letters and reports in the McCamish application. Users should know:

- Basic concepts of Life Insurance
- Basic knowledge of computers
- Basic knowledge of moving through application screens

Audience

This document will be used by the following PLI roles at India Post:

Mail

- Receipt and Dispatch
- Data Indexer
- Cashier

Backoffice

- Document Scanner
- Data Entry Operator
- Application Super Admin
- Application CPC Admin
- MIS Administrator
- DB Administrator
- System Administrator

Proposals

- Proposal Supervisor
- Proposal Quality Checker
- Proposal Approver
- Underwriter

Policy Servicing

- Claim Handler
- Claim Approver
- Financial Transaction Assistant
- Non-Financial Transaction Approver
- Customer Care/Call Center
- Claim Supervisor
- Claim Investigator
- Financial Transaction Supervisor
- NF Supervisor

Disbursement

- Cheque Printing Assistant

Collections

- Collections Supervisor

Accounting and Billing	Product	Reinsurance
•System Administrators •Executives •Directorate •Billing Manager	•Product Manager •Product Approver	•Treaty Assistant •Treaty Approver

Agent Management	Grievances Handling	Intermediaries and Pay Policies
•Sales Approver	•Grievance Handler	•Advisor Coordinator •Agent •List Bill Reconciler

Guidelines to Read the Document

The content is supported with graphical representations of the application screens at respective sections. Users must zoom in for an enlarged view of the screenshots.

Screenshots are followed by a table that provides information about the screen elements.

Users must refer to the Table of Contents, Acronyms, Icons and Glossary sections for easy reading.
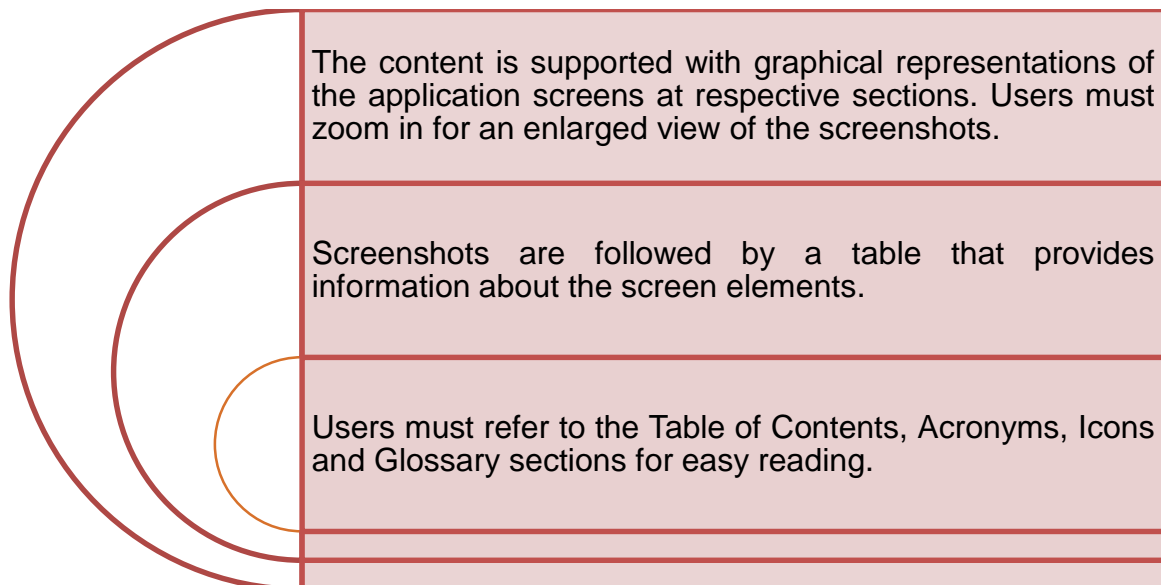
Typographical Conventions

Bold	Blue	*Italic*
• **User Interface Elements** • **Clickable Items** • **Process Names**	• Cross References • Table Name • Screenshot Label	• Cross References • Emphasis

i The 'blue' Cross Reference text changes its color to purple when it is clicked. This indicates that user has clicked on the link once before. However, user can still click on the link text and will again be navigated to the cross reference text.

Icons

It is suggested that the readers must familiarize themselves with these icons as they are used extensively used in this document.

	Screenshot
	Glossary
	Notes
	Critical Information
	Error Messages
	Zoom
	Process
	Reports
	Letters

Acronyms

HO	• Head Office
CPC	• Central Procesing Center
UW	• Underwriting
PLI	• Postal Life Insurance
PO	• Post Office
OCR	• Optical Character Reader
FRR	• Financial Review Report
UI	• User Interface
DoB	• Date of Birth
SA	• Sum Assured
MIS	• Management Information System
TAT	• Turn Around Time

Section 1: Introduction to Letters and Reports

Letters and Reports are an important part of the system that most users at India Post will use to perform their day-to-day activities. These are documents that support Policy Administration and Client Servicing. Letters and Reports are available in the system in pre-defined formats. Users need to process them as per their requirements.

Letters and Reports available in the system are event-specific and not product-specific. This means that the system will not store separate letter formats for informing clients about payment overdue for a Suraksha policy, Santosh policy or Suvidha policy. Rather, the system will store one letter format that can be used for informing clients about payment overdue irrespective of the product. Similarly, a user can generate a cheque bounce report for a specified period at India Post and not cheque bounce report for Suraksha or Suvidha, in particular.

1.1 Letters: An Overview

Letters are generated for an event that requires certain information to be sent to a customer.

In case of a loan rejection, the Loan Rejection Letter will be generated.

These letters, once generated, are sent to the customer by default. India Post users can reprint the letter, if the customer requests for it again or the customer reports non-receipt of the letter.

Letters are sent to the e-mail address of the customer or a hard copy is sent to the Communication Address of the customer. A Customer Service Representative will usually open and save a PDF copy of the required letter from a specific location and then attach it to a mail or print it to send it to the customer's address.

1.1.1 List of Letters

The system stores letters for various events that may occur with respect to Policy Administration and Client Servicing.

The table below lists the letters that are currently available in the system.

List of Existing Letters

Serial Number	Letter Category	Letter Title	Trigger Condition
1	Surrender	Intimation/Surrender Accepted Letter	Surrender is processed successfully
2	Surrender	Policy Quote Value	User clicks on the Quote icon
3	Surrender	Surrender Rejection	Approver rejects the surrender
4	Surrender	Force Surrender Intimation	Three loan interests are not paid
5	Surrender	Force Surrender Processed	Approver approves force surrender and surrender value is < 10000
6	Surrender	Force Surrender Processed	Approver approves force surrender and surrender value is > 10000
7	Surrender	Partial Withdrawal Letter	Partial surrender is processed successfully
8	Non Forfeiture Option (NFO)	Reduced Paid Up Acceptance	Reduced Paid up is successfully processed
9	Non Forfeiture Option (NFO)	Reduced Paid Up Rejection	Reduced Paid up is rejected by the approver
10	Commutation	Decrease in Sum Assured/Premium Accepted Letter	Event is processed successfully
11	Commutation	Decrease in Sum Assured/Premium Rejection Letter	Event is rejected successfully
12	Loan	Cover Letter /Loan Sanction Letter	Loan is processed successfully
13	Loan	Loan Rejection Letter	Loan is rejected
14	Loan	Loan Repayment Schedule	Loan has been sanctioned

Serial Number	Letter Category	Letter Title	Trigger Condition
15	Loan	Default Notice/ Overdue Intimation- Loan Capitalization Letter	Loan interest is not paid and capitalization event is triggered
16	Loan	Cheque Dishonor for Loan Repayment	Loan repayment cheque is dishonored
17	Loan	Loan Closure Letter	Loan is paid completely and Loan Account is closed
18	Loan	Loan Quote	Quote Value to be printed through the Quote screen
19	Freelook	Freelook Cancellation Letter	Freelook is processed successfully/approved by the approver
20	Freelook	Freelook Cancellation Rejection Letter	Freelook is rejected by the approver
21	Cancellation	Policy Cancellation Acceptance Letter	Policy cancellation request is approved
22	Cancellation	Policy Cancellation Rejection Letter	Approver rejects the policy cancellation request
23	Conversion	Conversion Acceptance Letter	Conversion request is approved
24	Conversion	Conversion Rejection Letter	Conversion request is rejected
25	Fund Switch	Fund Switch Letter acceptance	Funds are switched successfully
26	Fund Switch	Fund Switch Rejection Letter	Approver rejects Fund Switch
27	Redirection	Redirection Acceptance Letter	Future redirection of funds to be effected
28	Redirection	Redirection Rejection Letter	Approver rejects the redirection request
29	Billing and Collection	Premium Due Notice	■ Renewal reminder letter will be generated based on

Serial Number	Letter Category	Letter Title	Trigger Condition
			Frequency, specific days before the bill-to-date ■ Status of policies will not be generated for monthly frequency policy
30	Billing and Collection	List Bill Due Notice	■ List bill will be populated in the employer portal by 15th of every month ■ Standard letter to be sent by 10th every month ■ The bill details are populated in the employer portal that can be accessed only by the employer ■ Reminder must be sent on 7th of the next month if premium is not received
31	Billing and Collection	List Bill Due Reminder	Reminder must be sent on 7th of the next month to the employer if premium is not received
32	Billing and Collection	Payment Failure/ Cheque Bounce Letter	Cheque bounce details are received from the bank
33	Nomination Letter	Nomination Letter	Will be generated when nomination is approved
34	Assignment Letter	Absolute Assignment Letter	Successful processing of the absolute assignment
35	Assignment Letter	Conditional Assignment Letter	Successful processing of conditional assignment
36	Assignment Letter	Assignment Rejection Letter	Assignment request is rejected

Serial Number	Letter Category	Letter Title	Trigger Condition
37	Death Claim	Notification Letter	Claim is notified
38	Death Claim	Settlement Letter	Claim is successfully processed **Note**: In this case, the letter will be sent to the Payee by the user. If the Payee is not mentioned in the letter, it needs to pick up the nominees name and address
39	Death Claim	Discharge Voucher	Sent as part of claim settlement letter
40	Policy Servicing	Name Change	Name in the policy is changed
41	Policy Servicing	Address Change	Address in the policy is changed
42	Reinstatement	Revival /Reinstatement Letter	Lapsed policy is revived successfully and the Approver approves the revival/reinstatement request
43	Reinstatement	Reinstatement Rejection Letter	When revival/reinstatement is rejected
44	Reinstatement	Void Status Letter	Policy status is changed to Void
45	NBF and Policy Service	Letter to Customer/Agent for Missing Requirement	Missing/additional documents are required
46	NBF and Policy Service	Letter to customer/Agent for Missing Requirement	Non-receipt of missing/additional documents after 15 days of issue of first letter
47	NBF	Letter to Customer for Premium Change	Sent before policy issuance in case premium changes (counter offer)
48	NBF	Letter to Customer for Proposal Rejection	Proposal is declined

Serial Number	Letter Category	Letter Title	Trigger Condition
49	Reinstatement	Lapse Letter	Policy is lapsed
50	Survival Benefit	Survival Benefit Notification Letter	Survival benefit is due for a policy
51	Survival Benefit	Survival Benefit Settlement Letter	Survival benefit is approved for a policy
52	Survival Benefit	Survival Benefit Settlement Rejection Letter	Survival benefit is rejected for a policy
3	Billing and Collection	Electronic Fund Transfer (EFT) Transaction Unsuccessful	EFT Transaction is not successfully processed due to any reasons
54	Death Claim	Death Claim Rejection	Death claim has been rejected
55	Policy Servicing	Premium Payment Method Change	Method has been changed successfully
56	Policy Servicing	Premium Payment Method Change Rejected	Approver rejects the request
57	Maturity Claim	Maturity Claim Notification Letter	Policy reaches its maturity
58	Maturity Claim	Maturity Calculation Sheet and Settlement Letter	Maturity claim is approved by the approver
59	Maturity Claim	Maturity Claim Rejection Letter	Maturity claim is rejected by the approver
60	Surrender	Surrender Withdrawal	Approver approves withdrawal
61	Surrender	Surrender Withdrawal	Approver rejects withdrawal

Consolidated
Letters.xlsx

File contains list of letters developed in Iteration 1 (Pilot) and to be developed in Iteration 2 (Post Pilot).

1.2 Reports: An Overview

India Post users will generate various reports that can be classified under the following two types based on their pattern of generation:

Periodic Reports	Adhoc Reports
• These reports are automatically generated daily, weekly, monthly, half-yearly or yearly.	• These reports are generated manually as and when required.

Reports are generated by the batch setting in the system. Most of the reports are generated automatically. Some reports can be generated manually by providing some inputs. After these reports are generated, they can be downloaded, saved and printed.

1.2.1 List of Reports

The application allows users to process various types of reports. Some of these reports are used by the higher management to take important decisions. These reports are called the Management Information System (MIS) reports.

The table below lists the reports that are currently available in the system.

List of Existing Reports

Serial Number	Report Category	Report Title	Frequency
1	Billing and Collection	Pending Renewal Report	Daily and Monthly
2	Loan	Loan installment arrears Report	Monthly/Quarterly/Semi-annually/Yearly
3	Loan	Loan Interest Recovered Report	Monthly/Quarterly/Semi-annually/Yearly

Serial Number	Report Category	Report Title	Frequency
4	Claim	Death Claim Report	Monthly/Quarterly/Semi-annually/Yearly
5	Claim, Surrender	Full Surrender Report, Death Claim Report, Maturity Claim Report	Monthly/Quarterly/Semi-annually/Yearly
6	Claim	Product Wise Claim Paid Report	Monthly/Quarterly/Semi-annually/Yearly
7	Accounts and Actuary	Calculation of Incurred But Not Reported (IBNR) for Accounts Department and Appointed Actuary	Adhoc
8	Claim	Claim Ratio Report	Monthly
9	Claim	Claim Report on earned premium	Daily
10	Claim	Death Claim Pending Report	As frequency could be varied, date range would help user to pull the report as per the requirement
11	Claim	Average Claims per Policy Report	Adhoc
12	Claim	Claims Distribution Channel Wise	Monthly/Quarterly/Semi-annually/Yearly
13	Profitability	Product Portfolio Report	Adhoc
14	Profitability	Profitability Analysis Report	Yearly
15	Profitability	Risk Analysis Report	Monthly

Serial Number	Report Category	Report Title	Frequency
16	New Product	Key Features of product for filing new product	Anytime /Adhoc
17	Profitability	Business Projection for Next Five Financial Years	Adhoc
18	Profitability	Investment Performance Report	Daily
19	Billing and Collection	Daily Premium Realization Report	Daily
20	Billing and Collection	Cheque Bounce Report	Daily
21	Billing and Collection	Premium Realization Report	Daily, Date Range Given
22	Billing and Collection	Advance Premium Realization Report	Daily, Date Range Given
23	Profitability	Branch Product Portfolio Report	Adhoc
24	Profitability	Key Parameters Report	Adhoc
25	Turn Around Time (TAT)	Grievance Turn Around Time Report	Daily
26	TAT	Grievance Analysis Report	Daily
27	Profitability	Portfolio Profitability Report	Yearly
28	Claim	Claim Register Report	Daily/Monthly/Quarterly/Semi-annually/Yearly
	MIS Reports		

Serial Number	Report Category	Report Title	Frequency
29	New Business	New Business in Forced Report	Daily/ Weekly/ Monthly/ Quarterly/ Semi-annually/Yearly
30	Billing and Collection	Daily Premium Collection Report Daily Cheque Realization Report	Daily
31	New Business	Policy pending Enforcement Report	Daily
32	Claim	Report - Claims Logged	Daily
33	Claim	Report - Claims Settled Death Report - Claims Settled Maturity	Daily/ Weekly/ Monthly/Quarterly/ Semi-annually/Yearly
34	Loan	Report - Loan Disbursed	Daily/ Weekly/ Monthly/Quarterly/ Semi-annually/Yearly
35	Assignment	Report - Policy Assignment-Absolute Report - Policy Assignment-Conditional	Monthly/ Quarterly/Semi-annually/ Yearly
36	Billing and Collection	Premium Accountability	Daily/ Weekly/ Monthly/Quarterly/ Semi-annually/Yearly
37	Lapsation	Report - Lapse Events	Daily/ Weekly/ Monthly/Quarterly/ Semi-annually/Yearly
38	Surrender	Report - Full Surrender Report - Partial Surrender	Daily/ Weekly/ Monthly/ Quarterly/ Semi-annually/Yearly
39	Reinsurance	Report - Policy Reinsurance	Daily/ Weekly/ Monthly/ Quarterly/ Semi-annually/Yearly

Serial Number	Report Category	Report Title	Frequency
40	Unit Linked Insurance Policy (ULIP)	Report -Fund Details	Daily
41	Billing and Collection	Premium and Documentation Received Report	Daily
42	Conversion	Report - Policy Conversion	Monthly
43	TAT	Report -TAT (Turn Around time)	Monthly
44	New Business	BO Level Classification of New Business	Adhoc
45	New Business	Reason Wise Freelook Cancellation Report	Adhoc
46	New Business	Policy Cancellation Report	Adhoc

Report list 1.5.xlsx

File contains list of reports developed in Iteration 1 (Pilot) and to be developed in Iteration 2 (Post Pilot).

Reinsurance – The Insurance cover provided to the insurance company to manage the risk that is assumed by providing insurance to others.

Absolute Assignment – In Absolute Assignment, the policyholder loses all his rights over the policy proceeds and the Policy can only be reassigned to him through a written consent of the Assignee.

Conditional Assignment – However, under the Conditional Assignment the Assignment is contingent upon a Condition and the policy is reassigned to the Policyholder once the Condition is met.

Section 2: Letters and Reports – Formats

Letters and Reports that are used at India Post have standard formats. In this format, some sections display common information and information in some sections vary from document to document. The sections that display variable information contain content related to the letter or the report and are specific to the event for which the letter or the report is generated. This section explains the standard format of a letter and a report.

2.1 Standard Information in Letters

There are certain elements that are common across letters. The table below lists these common elements.

Important Elements Common across Letters

Serial Number	Type of Information	Information
1	Header	This section displays the logo and the return address.
2	Footer	This section displays the respective Central Processing Center (CPC) address and contact details.
3	Date Format	In top left corner, the date lines up with the company name under the logo and return address. Format of date is DD/MM/YYYY. For example, 18/03/2012. The same date format is used in the body of letter.
4	Amount Format	Amount starts with the Rs. Symbol and a comma is added after thousand. The amount is always up to two decimal places. For example, Rs.2,54,000.00
5	Closing Paragraph	The following standard closing paragraph is used wherever applicable: If you have any questions, please contact your Representative or our Head Office Member Services Department at <CSR Contact Number>. If you have any questions, please contact your Representative or our Head Office Member Services Department at 1-800-000-0000.

Serial Number	Type of Information	Information
		Enclosures : If any Signature 1: For the post issue letters -Yours faithfully, Member Services India Post
6	Font	All letters are in Arial font style with font size 10.

2.2 Standard Information in Reports

There are certain elements that are common across reports. The table below lists these common elements.

Important Elements Common across Reports

Serial Number	Type of Information	Information
1	Company Name	This section identifies the company name.
2	Report Name	This section identifies the name of the report.
3	Effective Date	This section displays the effective date of the details mentioned in the report. DD/MM/YYYY is the standard date format.
4	Page number	This section provides information on the current page number and the total number of pages in the report. For example, Page 1 of 10.
5	Date	This section provides the cycle date when the report gets processed in the Daily Event Processor in the system.
6	Time	This section is the time the report is generated from the system. HH:MM (24 hours) is the standard time format.

Section 3: Getting Started With Processing Letters and Reports

Letters and Reports can be processed from all India Post branches. All users involved in processing letters and reports need access rights for the application. Irrespective of their role, users will have their own credentials to access the application. These credentials consist of a user name and a password. Users will log in to the application using these credentials.

3.1 Log In

Users must log in to the application in the following manner:
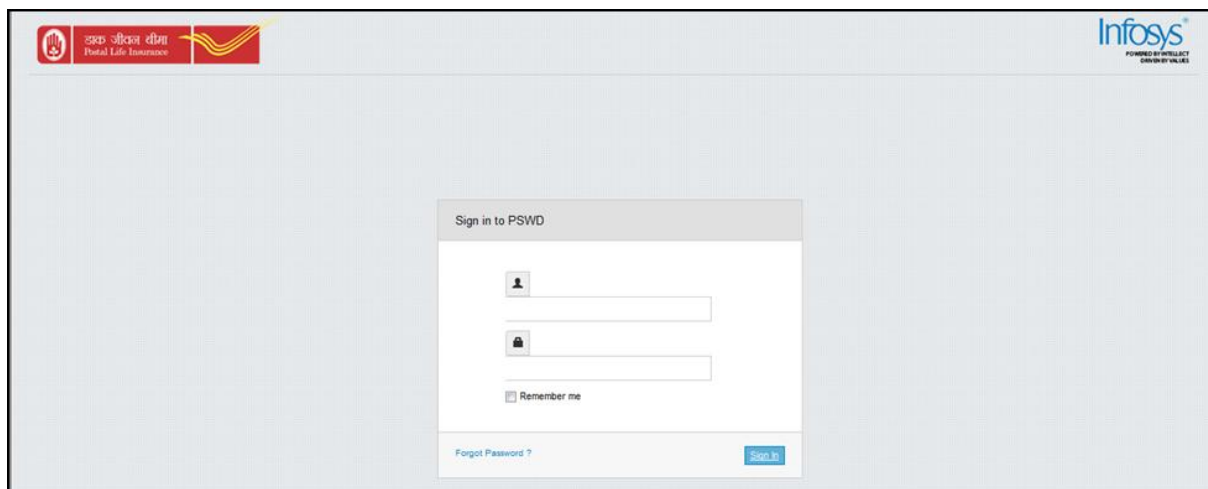
Step 1: 👤 – Enter User Name.

Step 2: 🔒 – Enter Password.

Step 3: Login – Click the **Login** button.

📷 The screenshot below shows the Login screen.

Log In Screen

The user would be able to *change* the Password when he/she logs in for the first time. The user name and the passwords are *case sensitive.*

Checking **Remember Me** option saves your Username and Password whenever the user signs in to the application next time.

All user roles will have the same Dashboard whether they are Indexers, Quality Checkers or Approvers.

3.2 The Dashboard

The Dashboard has three major sections to access various screens.
The upper section is a ribbon with a number of icons placed in a series.

Inbox
- The users must click the **Inbox** icon to view their respective tasks of the day.
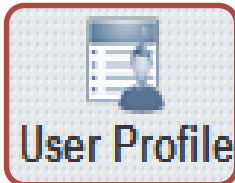
User Profile
- The users must click the **User Profile** icon to view their personal and work details.
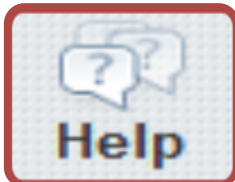
Help
- The users must click the **Help** icon to view solutions for their system queries.

Log Out
- The users must click the **Log Out** icon to log out of the system.

The central section has a number of work items placed in rows which includes the **Letters and Reports** icon.

Product Information

•Users must click on the **Product Information** button to find the complete listing of PLI and RPLI products of India Post.

Policy Search

•Users must click the **Policy Search** button to search for any existing or newly indexed policy of India Post.

Service Request Indexing

•Users must click the **Service Request Indexing** icon to log a new customer request.

Quote

•Users must click the **Quote** icon to generate a quote for any customer request.

Collection

•Users must click the **Collection** icon to access the Collection, Billing and Disbursement activities of India Post.

Reports

•Users must click the **Reports** icon to access the reports generated by the system.

Pricing Disbursement

•Users must click the **Pending Disbursement** button to access the pending disbursement activities screen.

Customer Search

•Users must click the **Customer Search** button to search for any existing or newly indexed customer of India Post.

The screenshot below shows the Dashboard.
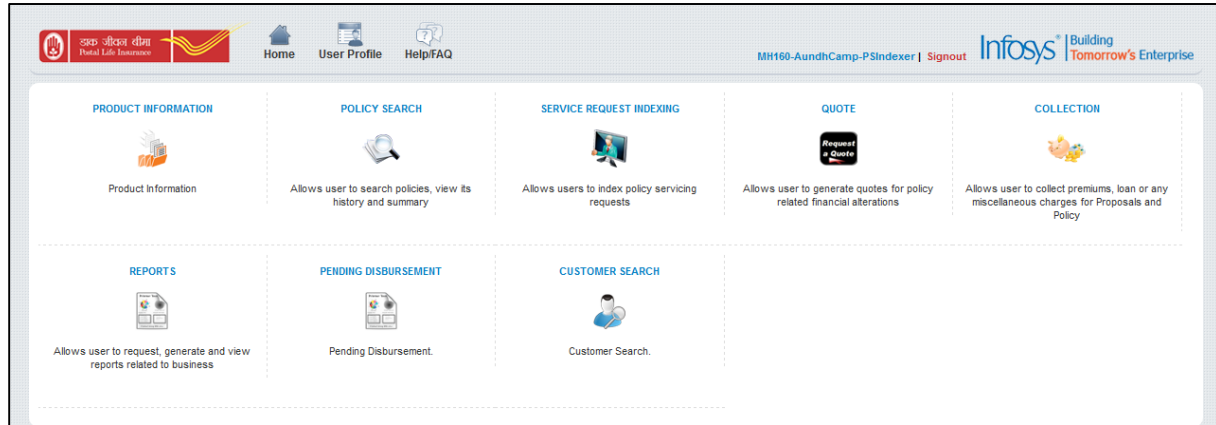
The Dashboard
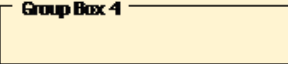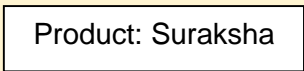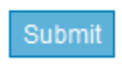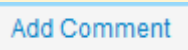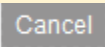
3.3 User Interface Elements

The users must enter required information in the application through the available elements on the screen. The table below lists the most common screen elements.

Frequently Used Screen Elements

Element	Description
	The drop-down box has a number of values in the list. Users must click the arrow to open the drop-down and select the required value.
Group Box 4	The user must enter the required value in the text entry field box.
	The user must click the **Calendar** icon to enter the required date for any month or year. A separate pop-up is displayed when the icon is clicked.
	The user must select the **Checkbox** icon to select a value. On click, the icon changes to ✅.

Element	Description
Product: Suraksha	The non-editable display fields and the values cannot be changed. Values entered in other screens or ones generated by the system are displayed here.
⚪	The user must select the **Radio** button to select a value. On click, the icon changes to ⦿.
Search	The **Search** button is an action button whose name signifies its function. The user must enter the search value in the field and click the button to complete the process.
View Documents	The **View Documents** button is an action button and the user can view the scanned documents.
Submit	The user must click the **Submit** button to submit details that are entered.
Add Comment	The user must click the **Add Comments** button to add comments.
Cancel	The user must click the **Cancel** button to cancel the changes.

Section 4: Processing Letters

Letters for a policy are generated automatically on the occurrence of a letter generating event like approval, rejection or requesting documents. Users can view the recently generated letters for a policy as a link. Using the link, they can download and save a letter. They can send this letter to the customer's e-mail address or print the letter and send it to the customer's communication address. In cases like death, users can send the letter via e-mail as well as to the mailing address.

4.1 Processing Letters in the System

Processing letters in the system involves the following three tasks:

Search for a Policy

Identify the required letters

Download the letter
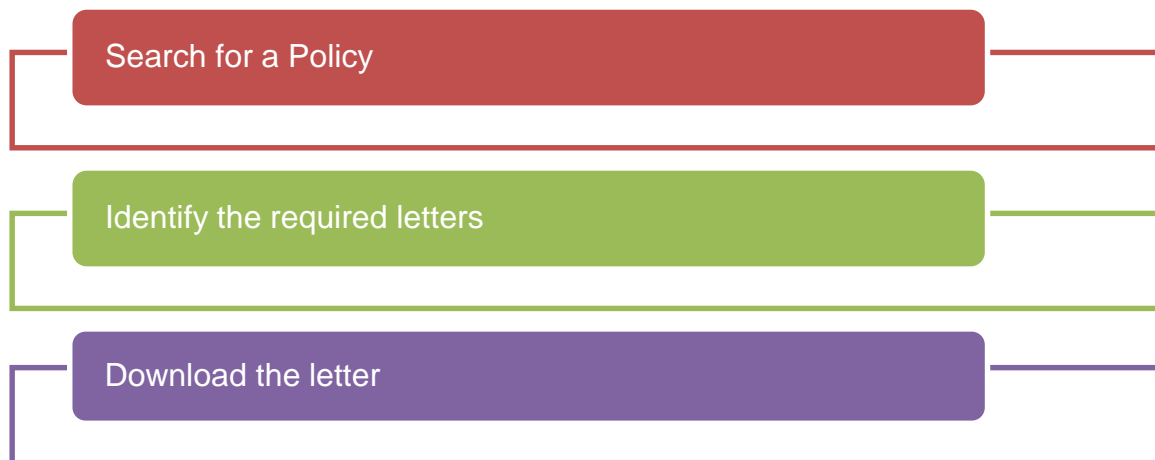
4.1.1 Searching for a Policy

If the policy number is not available, the users need to search for a policy in the system to view the letters associated with the policy. To search for a policy, users must perform the following steps:

Click the **Policy Search** icon on the Dashboard. The Policy Search screen is displayed.
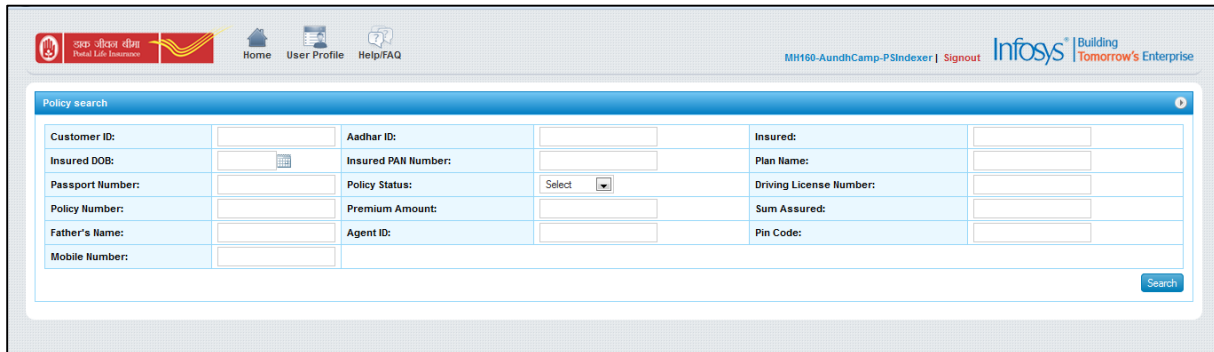
Enter appropriate search parameters to define the policy search in the Policy Search screen.

Click the **Search** button after specifying the search parameters.

The search results matching the search parameters are displayed.

The screenshot below shows the **Policy Search** screen.

Policy Search Screen

Users must enter appropriate search parameters to define the policy search. It is recommended that users enter multiple search parameters to narrow the search.

Some of the search parameters that can be entered are:

Customer ID

Policy Number

Passport Number

UID Number

Insured PAN Number

Driving License Number
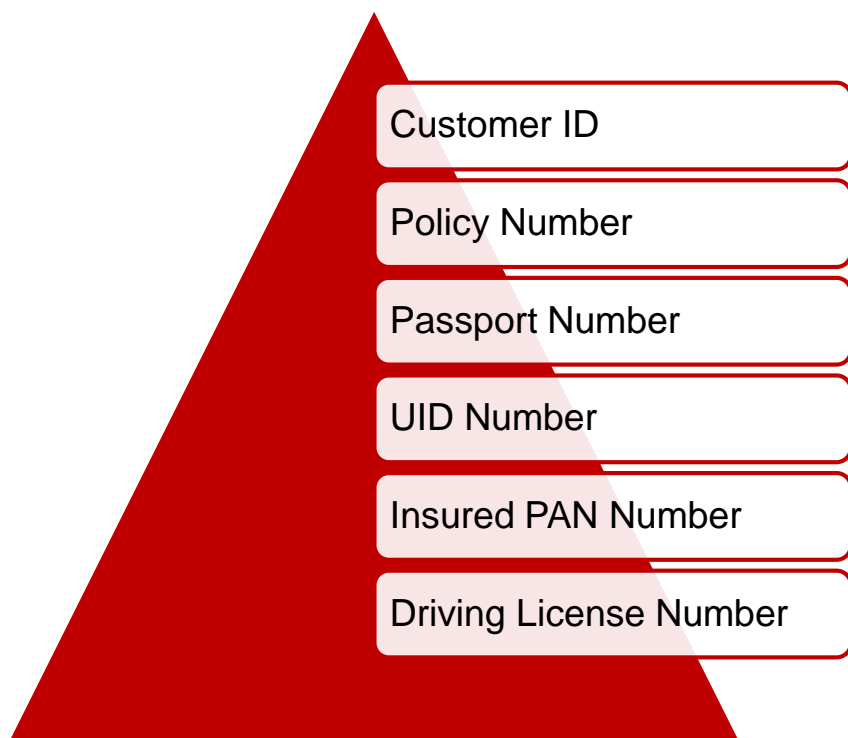
Depending on the search parameters, the search result may list multiple policies. Users need to identify the policy by checking the details that are displayed on the Search Result table.

The screenshot below represents the Search Result section in the Policy Search screen.

Search Result Section

4.1.2 Identifying the Required Letter

After the policy has been identified, perform the following two steps to identify the required letter:

Click the **View History** icon in the **Search Result** section of the Policy Search page. (*Refer to the Search Result screen in section 4.1.1*). Clicking this icon displays the **Policy History** page.

Click the **Correspondence** tab on the **Policy History** page. Clicking this tab displays a list of letters that are available and can be processed for the selected policy. Identify the letter that is to be processed. For example, if the user wants to send a letter for claim settlement, the appropriate letter has to be identified.

The screenshots below represents the **Policy History** page.

Policy History Page

The screenshots below represents the **Policy History** page and **Correspondence** tab in the **Policy History** page.

4.1.3 Downloading the Letter

Users can download a letter by clicking the required letter name link in the Letter Name column (*Refer to the Correspondence tab screenshot in section 4.1.2 to view the link*). After the letter is downloaded, it can be either sent through e-mail or to appropriate mail address to the customer, agent or any other entity.

Section 5: Processing Reports

5.1 Processing Reports: Overview

Users can generate the following two types of reports:

Batch Reports	Manual Reports
• These reports are periodic and are generated automatically when the scheduled batch runs • Once the System Administrator sets the required report in the batch, the report will be automatically generated on the scheduled time.	• These are adhoc reports and are generated when a user provides inputs for certain fields in the Reports page of the application. • India Post users can generate, download, save and print manual reports.

5.2 Processing Reports in the System

Processing manual reports in the system involves the following two steps:

Providing Report Parameters

Generating the Report
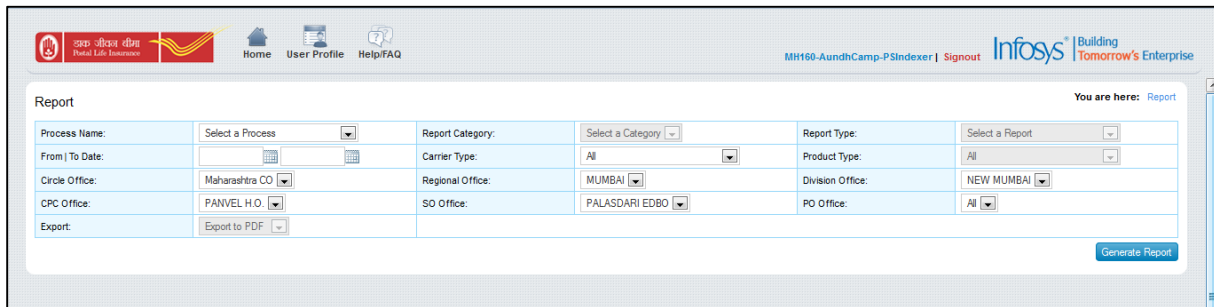
5.2.1 Providing Report Parameters

It is suggested that users provide maximum inputs to generate the required report.

Clicking the **Reports** link on the Dashboard takes the users to the Report page. The users must enter appropriate details about the reports that need to be processed.

The screenshot below shows the **Report** page and the table that follows provides information on the report inputs that are to be provided by users.

Report Page

Page Elements: Report inputs

Serial Number	Field Name	Important Notes
1	Process Name	Users need to select a value from the following drop-down list: ■ Loan ■ Policy Servicing ■ Request Indexing ■ Claims ■ Accounting
2	Report category	Users can select from the following two options: ■ Detailed ■ Consolidated

Serial Number	Field Name	Important Notes
3	From date & To date	Users need to select the date range for the report by selecting the From date and To date.
4	Report Type	The types of reports have been discussed in one of the earlier sections. Refer to those sections of this manual for the same. These report types are listed in the drop-down for this field. Users need to select an appropriate option.
5	Product Type	This drop-down lists the products stored in the database. Users can select the option All or any one of the options listed.
6	Carrier Type	If the user wants reports on the basis of PLI or RPLI separately he has to select as per his requirement.
7	Circle Office	This drop-down lists all the division names. Users can select All or any one division name.
8	Division Office	This drop-down lists all the CPC names. Users can select All or any one CPC name.
9	CPC Office	This drop-down lists all the PO names. Users can select All or any one PO name.
10	PO Office	Users need to enter the appropriate PO code.
11	Export	The user can export the report to Excel or PDF.
12	Generate Report	Clicking this button generates the report based on the provided inputs.

5.2.2 Generating the Report

After the user has entered all the required inputs related to the report that they want to generate, they need to click the **Generate Report** button in the **Report** page to display the report. Users can then save the report and print it, if required.

Glossary

Term	Definition
Logging in	Logging in is the process through which the user of an application is identified and authenticated.
User Profile	User profile is a collection of personal data associated to a specific user.
Inbox	Inbox refers to the section of the application where tasks are listed and users view the assigned tasks.
Intimation	Intimation refers to any communication sent to the customer in the form of e-mail, letter or SMS.
Fields	Fields refer to the components on the application screens
Batch	Batch refers to the scheduled function that the system performs automatically at a scheduled time.
Adhoc	Adhoc refers to the function that the user has to perform to generate the document.