

India Post

Postal Life Insurance

Application Training Program

Advisor Profile Management Operating Manual



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Executive Summary

About the Manual

India Post, Government of India, has implemented the PMACS® application to maintain the activities of its Advisors and Advisor Coordinators. This application helps in finding the advisors' records, paying commission, licensing, measuring performance and termination. In this regard, Postal Officers must follow new processes and use the new application to create new advisor profiles.

This manual contains the following sections:

- 1 • New Advisor Profile – Overview
- 2 • Getting Started with PMACS®
- 3 • New Advisor Profile Creation
- 4 • Advisor Profile Management
- 5 • Termination of Advisors

Scope of the Document

This document will teach India Post users to create new advisor profiles and their management in the PMACS® application. Users should know:

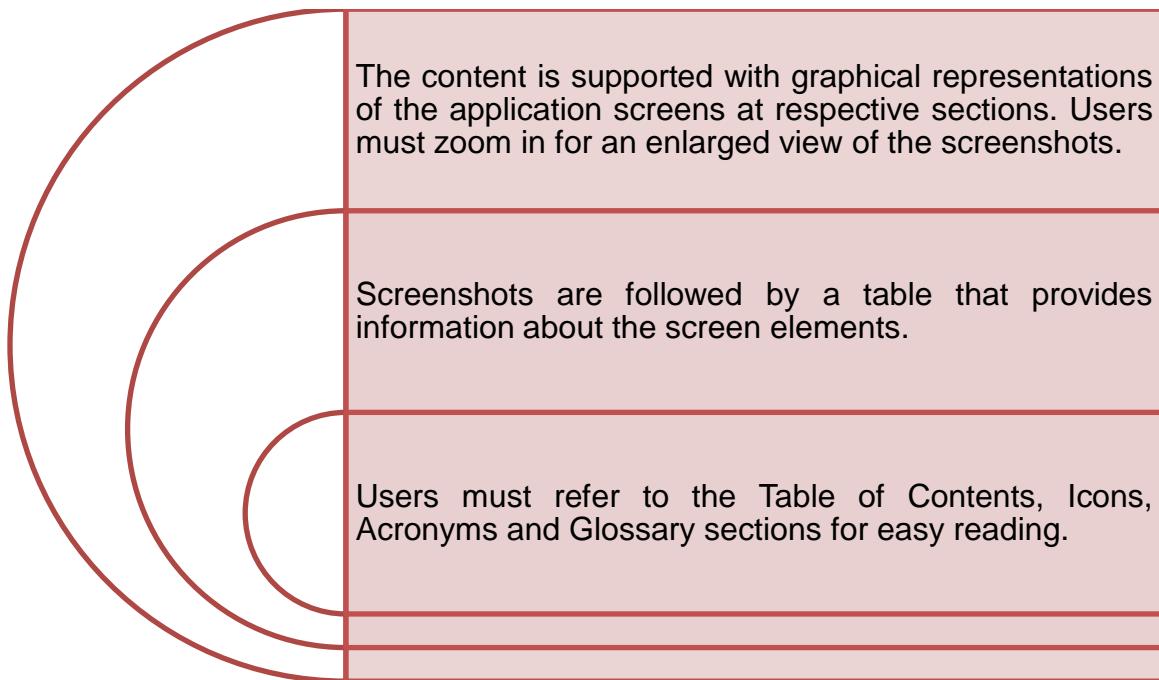
- Basic concepts of Advisor Profile Management
- Basic knowledge of computers
- Basic knowledge of moving through application screens

Audience

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

-  Divisional Superintendent
-  Advisor Coordinators
-  India Post team
-  PMACS® users

Guidelines to Read the Document



Typographical Conventions

Bold

- User Interface Elements
- Clickable Items
- Process Names

Blue

- Cross References
- Table Name
- Screenshot Label

Italic

- Cross References
- Emphasis



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 in this document.



Notes



Critical Information



Error Messages



Zoom



Process



Data Entry Operator



Scanner



Example



Screenshot



Glossary



Advisor



Indexer

Acronyms

PLI	• Postal Life Insurance
RPLI	• Rural Postal Life Insurance
PO	• Post Office
ASP	• Assistant Superintendent
DoB	• Date of Birth
ECMS	• Enterprise Content Management System
POLI	• Post Office Life Insurance Rules — 2011
PAN	• Permanent Account Number
CPMG	• Chief Post Master General
DSP	• Divisional Superintendent
DPS	• Director Postal Services
AC	• Advisor Coordinator
PMACS®	• Producer Management and Compensation System

Section 1: New Advisor Profile – Overview

1.1 Overview

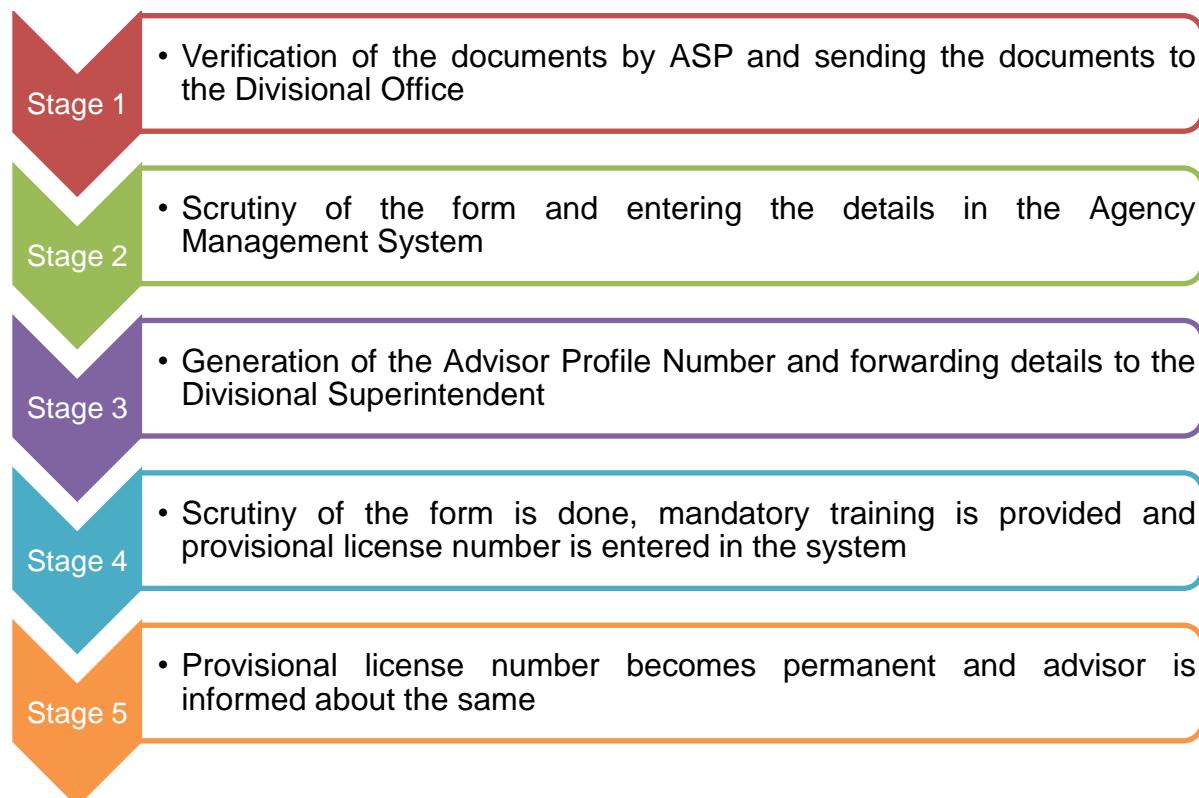
There are certain regulatory guidelines and requirements which have been issued by India Post PLI. An advisor must fulfill those requirements before selling Insurance.



All the details related to the demographics, business obtained, commission paid, etc. of an advisor have to be managed and stored somewhere. Hence, Advisor Profile Management needs to be efficiently managed.



The new advisor ([Refer to Def. 12 under Section 5 POLI RULES – 2011](#)) profile creation process begins with the candidate filling up the application form along with the required documents. The documents are then sent to the Assistant Superintendent (ASP). After the receipt of the application form, the following stages are involved in the processing:



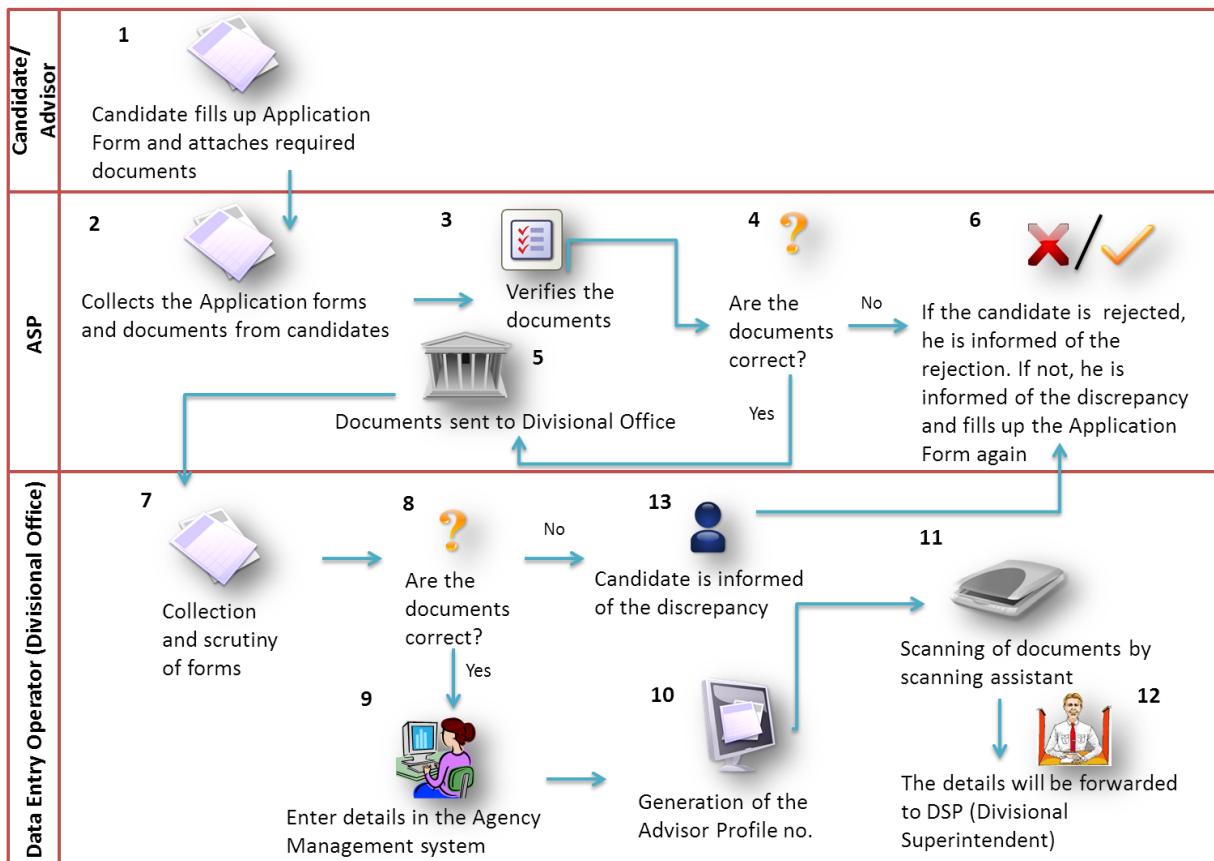
1.2 Process Flow Diagrams



The process flow diagram presented below shows the new advisor profile creation and license renewal follow-up steps in detail.



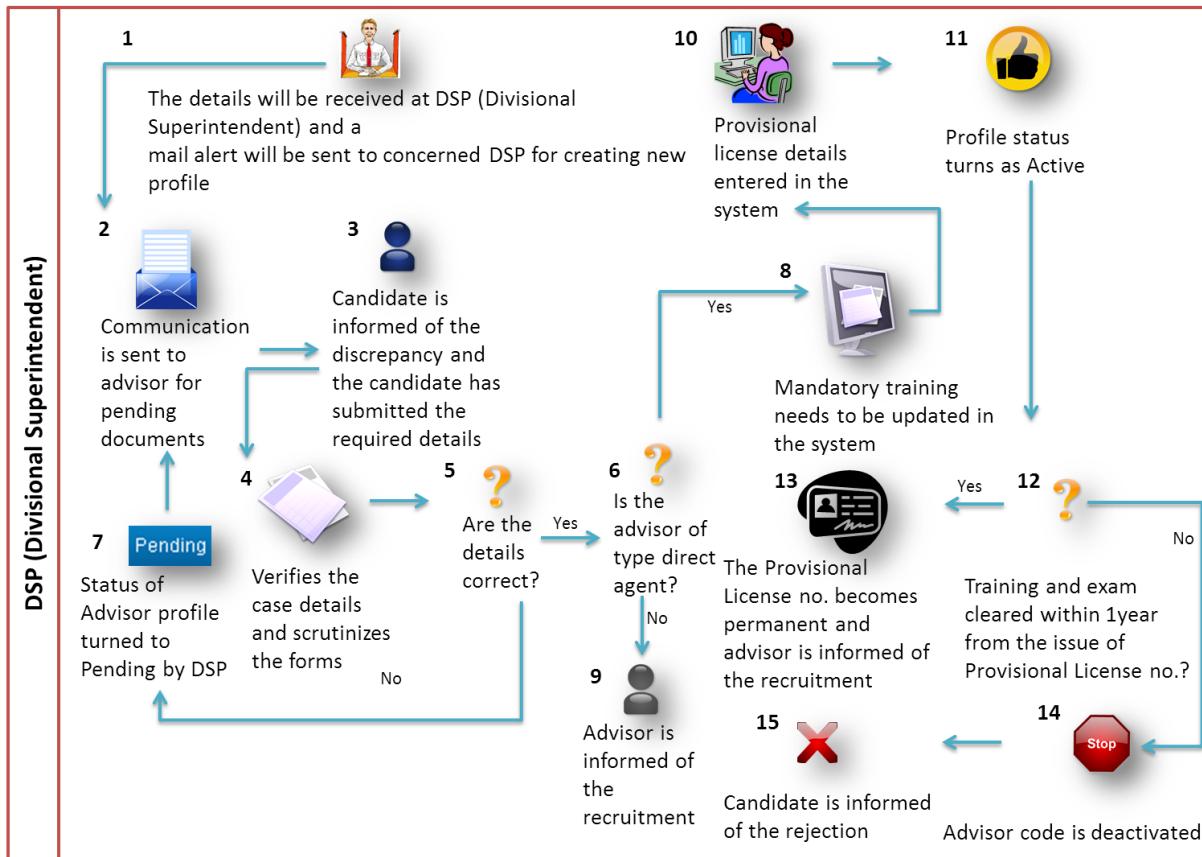
It is suggested that users zoom in the document for better readability.



The numbers indicate the sequence of steps within the process



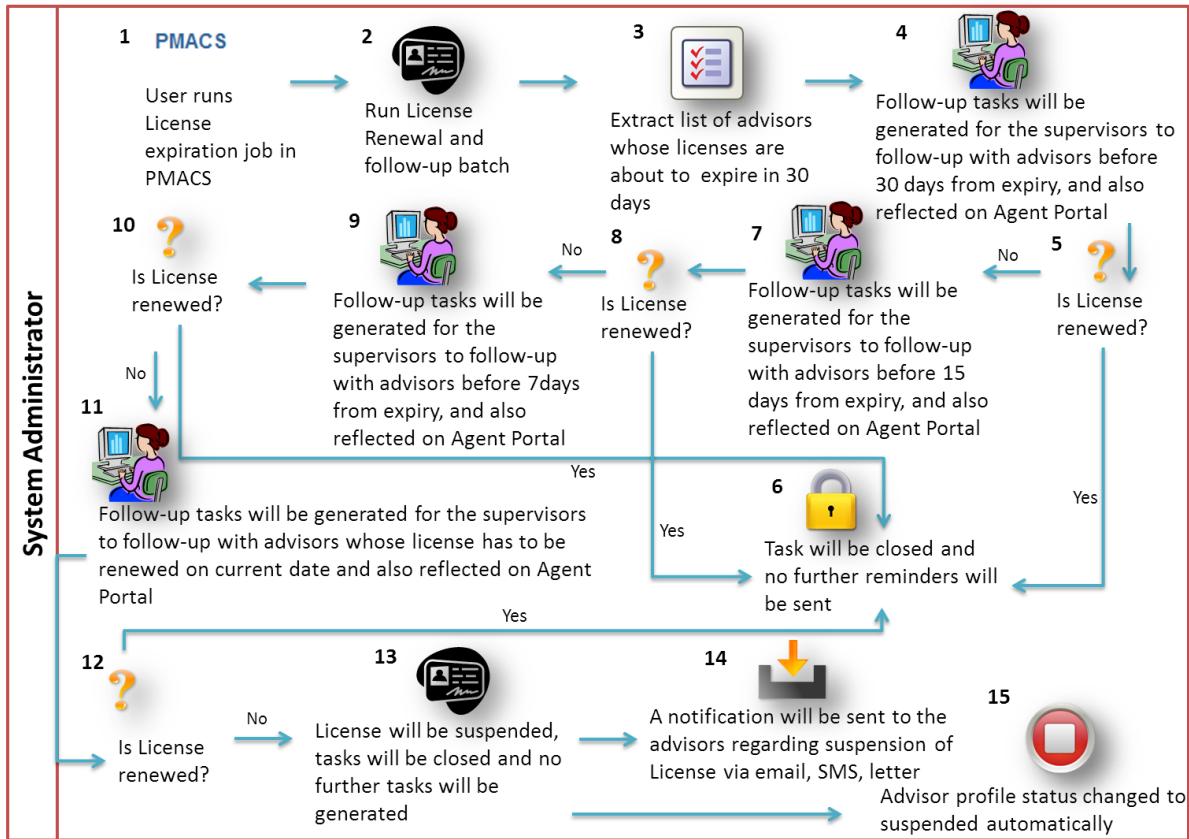
New Advisor Creation I – Process Flow



The numbers indicate the sequence of steps within the process



New Advisor Creation II – Process Flow



License Renewal Follow-up – Process Flow

Section 2: Getting Started with PMACS®

2.1 Introduction

The PMACS® (Producer Management and Compensation System) application can be signed in from any India Post workplace. All users must log in using their credentials. These credentials consist of a user name and a password.

2.2 Login



Users must log in to the application in the following manner:





The screenshot below shows the Login screen.

Gateway to Insurance Application

User ID
Password

Forgot Password ? Sign In

Copyrights © Infosys BPO Limited

Infosys Building Tomorrow's Enterprise

PMACS® Login Screen



This action will take the user to the PMACS Home Page screen which is shown in the screenshot below.

Home User Profile Help/FAQ PMACS | Logout Infosys Building Tomorrow's Enterprise

PRODUCT INFORMATION

Product Information

AGENT MANAGEMENT

Allows user to add agent profiles, search agents and commission maintenance

DB Administrator Copyrights © Infosys BPO Limited PALASDARI EDBO

PMACS® Home Page



2.3 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.
	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 .
	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 .
	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.
	The user must click the Submit button to submit details that are entered.

Section 3: New Advisor Profile Creation



New Advisor Profile creation allows the user to create a new Advisor or a new Advisor Coordinator profile.



The advisor profile is created by the Data Entry Operator at the Divisional Office. Documents are verified by the ASP and sent to the Divisional Office. The complete process is explained in detail below.

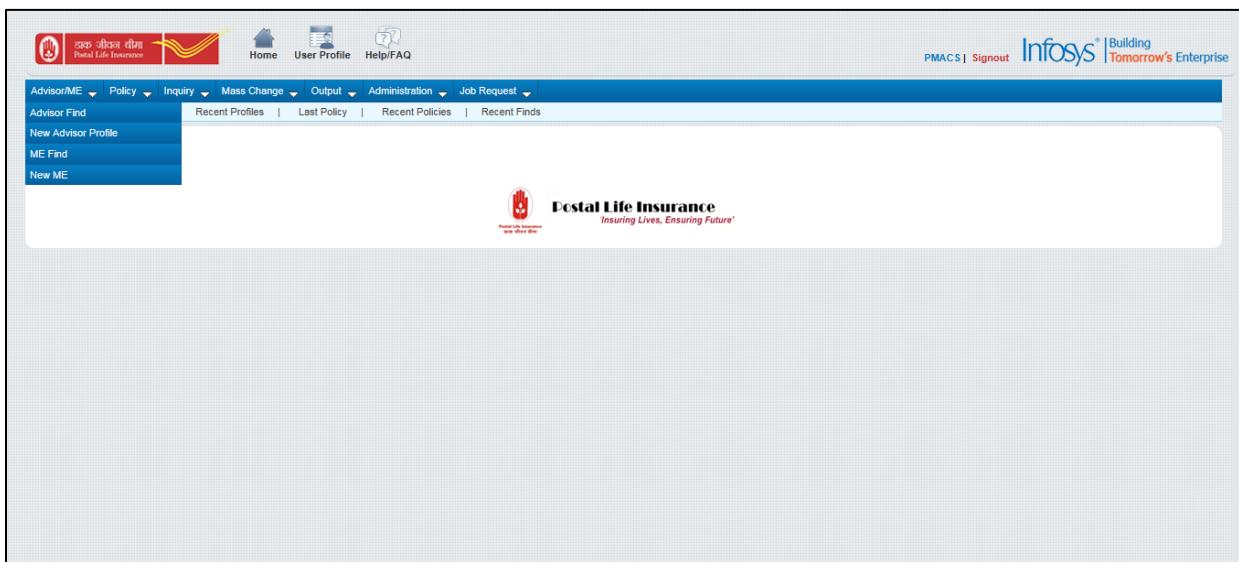
3.1 Profile Add – New Profile Options



Users must click on **New Advisor Profile** option under the **Advisor/ME** tab to create an advisor profile.



The screenshot below shows the New Advisor Profile – Advisor/ME Tab and Profile Add – New Profile Options page. The table that follows provides information on the important elements of this page.



The screenshot displays the Postal Life Insurance website interface. At the top, there is a header with the India Post logo, the text "भारतीय डिप्ट डिविलियरमेंट्स", and "Postal Life Insurance". Below the header are navigation links for Home, User Profile, and Help/FAQ. On the right side of the header, there are links for "PMACS | Signout" and the Infosys logo with the tagline "Building Tomorrow's Enterprise". The main menu bar has dropdowns for "Advisor/ME", "Policy", "Inquiry", "Mass Change", "Output", "Administration", and "Job Request". Under the "Advisor/ME" dropdown, the "New Advisor Profile" option is highlighted. The main content area shows a table with four rows: "Recent Profiles", "Last Policy", "Recent Policies", and "Recent Finds". At the bottom of the page, there is a footer with the "Postal Life Insurance" logo and the tagline "Insuring Lives, Ensuring Future".

New Advisor Profile – Advisor/ME Tab





Profile Add - New Profile Options
Select the Options for the new profile and click Continue.

Add New Profile

Advisor Coordinator Option

The new profile reports to an Advisor Coordinator already in PMACS.
 The new profile is an Advisor Coordinator I need to add to PMACS.

Person Option

The new profile is a person.
 The new profile is a Corporates/Groups
 Advisor Undergoing Training

Continue Cancel

Profile Add – New Profile Options



Page Elements: Profile Add – New Profile Details

Serial Number	Advisor Coordinator Options	Description
1	The new profile reports to an Advisor Coordinator already in PMACS.	Users must select this option to create an Advisor profile.
2	The new profile is an Advisor Coordinator I need to add to PMACS.	Users must select this option to create an Advisor Coordinator profile.

Serial Number	Person Options	Description
1	The new profile is a person.	Users must select this option to create a person profile.
2	The new profile is a Corporates/Groups.	Users must select this option to create a corporate/group profile.



If the checkbox for **Advisor Undergoing Training** is selected, then the **Advisor Undergoing Training** profile indicator will be turned to 'Y'. It will also be reflected on the **Profile maintenance – Basic** page for that particular profile, once the profile is created.

Page Elements: Profile Add – New Profile Details

Serial Number	Field Name	Notes
1	Continue	<p>If the new profile reports to an Advisor Coordinator already in PMACS, then clicking the Continue button will move the user to the Profile Add – Select New Advisor Coordinator page.</p> <p>If the new profile is of an Advisor Coordinator, then clicking the Continue button will move the user to Profile Add – Enter Profile details page.</p>
2	Cancel	Users must click the Cancel button to return to the PMACS Home page.



Resolving Important Error Messages

Critical Error Messages and Required Action

Serial Number	Condition	Error Message	Required Action
1	If the Advisor Coordinator option is selected and Person option is not selected and Continue button is pressed	Please indicate if the new profile is a Person.	Users must select the Person Option from the choices provided.
2	If no radio button option is selected for Advisor Coordinator option and Person option and Continue button is pressed	Please indicate if the new profile is a Advisor Coordinator.	Users must select the Advisor Coordinator Option from the choices provided.

3.2 Profile Add – Select New Advisor Coordinator



Profile Add – Select New Advisor Coordinator page appears when the **Advisor Coordinator Option** is selected as ‘The new profile reports to an Advisor Coordinator already in PMACS.’



The screenshot below shows the **Profile Add – Select New Advisor Coordinator** page. The table that follows provides information on the important elements of this page.



Profile Add - Select New Advisor Coordinator
Enter criteria and click Search to find Advisor Coordinator Profiles. Click the Select hyperlink in the Action column to continue with the Profile Add process.

AC Profile # AC Profile Name Search Clear

AC Profile #	AC Profile Name	Profile Type	Status	Person

AC Profile #	AC Profile Name	Profile Type	Status	Person

Profile Add – Select New Advisor Coordinator



In this page, users must enter the search for the Advisor Coordinator based on two criteria:

AC Profile #

AC Profile Name

Page Elements: Profile Add – Select New Advisor Coordinator Details

Serial Number	Field Name	Notes
1	AC Profile #	Users must enter the AC Profile # or Profile Number prefix in the textbox. Profile # is Unique Identification number through which Advisor or Advisor Coordinator can be identified.
2	AC Profile Name	Users must enter the AC Profile Name in the textbox. This is one of the search criteria; which is included to give additional search option to the user.



On clicking the **Search** button all the profiles with the matching search criteria will be reflected. Users must click the **Select** button to select a AC Profile.



The screenshot below shows the **New Advisor Coordinator Search** Result page. The table that follows provides information on the important elements of this page.

AC Profile #	AC Profile Name	Profile Type	Status	Person	Action
MA00072296	22ndJulyMGAgent	Divisional Superintendent	Active	N	Select

New Advisor Coordinator Search Result



Page Elements: New Advisor Coordinator Search Result Details

Serial Number	Field Name	Notes
1	AC Profile #	Profile Number of the Advisor Coordinator is displayed.
2	AC Profile Name	Profile Name of the Advisor Coordinator is displayed.
3	Profile Type	Profile Type of the Advisor Coordinator is displayed.
4	Status	Current status of the Advisor Coordinator is

Serial Number	Field Name	Notes
		displayed.
5	Person	Person Indicator, e.g. Y is displayed.
6	Action	It displays Select hyperlink against each row which is used to select the profile.
7	Search	Users must enter the search data and click the Search button. This shows the Advisor Coordinators profile returned from the search criteria provided.
8	Clear	Users must click the Clear button to clear the entered data in the text boxes.
9	Back	Users must click the Back button to go to the Profile Add – New Profile Options page.
10	Cancel	Users must click the Cancel button to go to the PMACS Home Page .



Resolving Important Error Messages

Critical Error Messages and Required Action

Serial Number	Error Message	Required Action
1	Your selected criteria did not return any rows. Please change your selections and try again.	Users must change the selection criteria and try again.

3.3 Profile Add – Enter Profile Details



Profile Add – Enter Profile Details page appears when the Advisor Coordinator Option is selected as ‘**The new profile is an Advisor Coordinator I need to add to PMACS.**’



Screenshot below shows the **Profile Add – Enter Profile Details** page. The table that follows provides information on the important elements of this page.

Profile Add – Enter Profile Details



Page Elements: Details for Profile Add – Enter Profile Details

Serial Number	Field Name	Notes
1	Profile Type	Users must click the arrow to open the drop-down and select the required value. It is used to select the Profile Type, since there are multiple types of Advisors present.
2	Office type	This will only be enabled when the profile is made as a ‘Non-person’. Users must click the arrow to open the drop-down



Serial Number	Field Name	Notes
		and select the required value. It is used to select the Office type.
3	Office code	This will only be enabled when the profile is made as a ' Non-person '. It is used to enter the Office code.
4	Advisor sub-Type	Users must click the arrow to open the drop-down and select the required value. It is used to select the Advisor sub-Type.
5	Effective Date	Users must enter the Effective Date in dd/mm/yyyy format. It is used to tell the effective date through which user can find the profile.
6	Distribution Channel	User must select the checkbox for the Distribution Channel . Distribution Channel is the channel from where the products will be sold.
7	Product Class	User must select the checkbox for the Product Class . Products and their codes are sold through a Distribution Channel.
8	Select All	Users must click the Select All hyperlink to check all rows in the selection grid.
9	Clear All	Users must click the Clear All hyperlink to un-check all rows in the selection grid.
10	Continue	Users must click the Continue button to go to the Profile Add – Enter Name & PAN Number Information page.
11	Back	Users must click the Back button to return to the Profile Add – Select New Advisor Coordinator page.
12	Cancel	Users must click the Cancel button to return to the PMACS Home Page .



Resolving Important Error Messages

Critical Error Messages and Required Action

Serial Number	Condition	Error Message	Required Action
1	If the Profile type is not selected and Continue button is pressed.	Please select a Profile Type.	Users must select the Profile Type from the drop-down list.

3.4 Profile Add – Enter Name & PAN Number Information



Profile Add – Enter Name & PAN Number Information page appears on clicking the **Continue** button.



The screenshot below shows the **Profile Add – Enter Name & PAN Number Information** page. The table that follows provides information on the important elements of this page.



Profile Add - Enter Name & PAN Number Information
Enter Name & PAN Number Information for the new profile.

Name	
Last Name	<input type="text"/>
First Name	<input type="text"/>
Middle Name	<input type="text"/>
PAN Number	
PAN Number	<input type="text"/> P <input type="text"/>

Continue Back Cancel

Profile Add – Enter Name & PAN Number Information



Page Elements: Details for Profile Add – Enter Profile Details

Serial Number	Field Name	Notes
1	Last Name	Users must enter the last name.
2	First Name	Users must enter the first name.
3	Middle Name	Users must enter the middle name.
4	Continue	Users must click the Continue Button to go to the Profile Add – Confirms page.
5	Back	Users must click the Back button to return to the Profile Add – Enter Profile Details page.
6	Cancel	Users must click the Cancel button to return to the PMACS Home Page .



Profile Add – Enter Name & PAN Number Information page appears on clicking the **Continue** button. Permanent Account Number (PAN) will be stored in the system as *predefined format*.

Format for the PAN will be as:

- First three letters will be alphabets.
- Fourth letter will be static and will be 'P'. Also, if the Advisor Coordinator is a non-person, then the static text will be 'C'.
- Fifth letter will be an alphabet.
- Sixth, seventh, eighth and ninth letters will be numbers.
- Tenth will be an alphabet.

Eg

ABHPK156L is an example of a PAN number.



Resolving Important Error Messages

Critical Error Messages and Required Action

Serial Number	Condition	Error Message	Required Action
1	If the PAN number entered already exists for some other profile.	PAN number entered already exists for another advisor's profile and cannot be for this profile.	Users must enter the PAN number which does not exist for another advisor's profile.
2	PAN number should be of 10 characters. If the PAN number length doesn't match.	Please enter a 10 digit Permanent Account Number (PAN).	Users must enter the 10 digit PAN number.
3	PAN number should be entered in the standard format as shown above. If the PAN doesn't match with the format as	Please enter correct PAN.	Users must enter the PAN number as per the standard format.

Serial Number	Condition	Error Message	Required Action
	already defined in the system.		
4	If the Last name is not entered and Continue button is pressed.	Please enter a Last name.	Users must enter the last name of the Advisor.
5	If the First name is not entered and Continue button is pressed.	Please enter a First name.	Users must enter the first name of the Advisor.

3.5 Profile Add – Confirms



Profile Add – Confirms page appears on clicking the **Continue** button. Here, the user will be asked to confirm the data entered.



The screenshot below shows the **Profile Add – Confirms** page. The table that follows provides information on the important elements of this page.



Profile Add - Confirms
Confirm the data entered or defaulted. Enter detailed name and PAN number information for the new profile if necessary.

Profile			
Advisor Coordinator	22ndJulyMAgent	Profile Type	Departmental Employee
Effective Date	20/12/2013	Build Option	New Agent And Profile
Person Indicator	Y	Advisor Undergoing Training	N
Office Type		Office Code	

Name			
Last Name	Jain	First Name	Deep
Middle Name		Service Number	
Title	<input type="button" value="▼"/>	Professional Title	<input type="button" value="▼"/>
Designation/Rank	<input type="button" value="▼"/>		

Personal Information			
Gender	<input type="button" value="Unknown"/>	Category	<input type="button" value="Unknown"/>
Date Of Birth	<input type="button" value="20/12/2013"/>	Marital Status	<input type="button" value="Unknown"/>

PAN Number Information	
PAN Number	ADFPS1246V

[Continue](#) [Back](#) [Cancel](#)

Profile Add – Confirms**Page Elements: Profile Add – Confirms Details**

Serial Number	Field Name	Notes
1	Service Number	Users must enter the Service Number in the text box provided.
2	Title	Users must select the Title of the person from the drop-down list.
3	Professional Title	Users must select the Professional Title from the drop-down list.
4	Designation/Rank	Users must select the Designation/Rank of the person from the drop-down list.
5	Gender	Users must select the Gender of the person from the drop-down list.
6	Category	Users must select the Category of the person from the drop-down list.
7	Date of Birth	Users must select the Date of Birth of the person. Date of Birth is mandatory here.

Serial Number	Field Name	Notes
8	Marital Status	Users must select the Marital Status of the person from the drop-down list.
9	Continue	Users must click the Continue button to go to the Profile Add – Additional Information page.
10	Back	Users must click the Back button to return to the Profile Add – Enter name & PAN Information page.
11	Cancel	Users must click the Cancel button to return to the PMACS Home Page .



Resolving Important Error Messages

Critical Error Messages and Required Action

Serial Number	Condition	Error Message	Required Action
1	If the Date of Birth is not entered and Continue button is pressed.	Please enter a valid Date of Birth	Users must enter the valid Date Of Birth.



Confirmation message appears on clicking the **Continue** button.



The screenshot below shows the confirmation message that profile has been successfully created along with the **Profile Number** and **Profile Name**.



The screenshot shows the 'Profile Add - Additional Profile Information' page. At the top, there are links for Home, User Profile, and Help/FAQ. The main content area has a table titled 'Additional Profile Information' with rows for 'Add Address - 0 Added', 'Check Profile Activation Edits - Not Checked', 'Add Phone - 0 Added', 'Add Superior Advisor - 0 Added', 'Add E-mail - 0 Added', and 'Add Bank - 0 Added'. Below this is a section titled 'Edits' with a checkbox for 'Run Profile Activation Edits'. A message box in the center says 'Message from webpage' with the text 'Profile successfully created with Profile Number - DE00000111 and Profile Name - diptiJain' and an 'OK' button. At the bottom, it shows 'DB Administrator', 'Copyrights @ Infosys BPO Limited', and 'PALASDARI EDBO'.



Click **Ok**.



3.6 Profile Add – Additional Profile Information



Profile Add – Additional Profile Information page appears on clicking the **Ok** button. Here, the user can add additional details for an advisor profile.



The screenshot below shows the **Profile Add – Additional Profile Information** page. The table that follows provides information on the important elements of this page.



Profile Add - Additional Profile Information
Use the hyperlinks below to enter additional profile information. Click Done to bypass or complete this process.

Additional Profile Information	
Add Address - 0 Added	Check Profile Activation Edits - Not Checked
Add Phone - 0 Added	Add Superior Advisor - 0 Added
Add E-mail - 0 Added	Add Office Affiliation - 0 Added
Add Bank - 0 Added	
Edits	
Run Profile Activation Edits <input checked="" type="checkbox"/>	

Done

Profile Add – Additional Profile Information**Page Elements: Details for Profile Add – Additional Profile Information**

Serial Number	Field Name	Notes
1	Add Address	Users must click the hyperlink to add address to pass the validation check.
2	Add Phone	Users must click the hyperlink to add phone number.
3	Add Email	Users must click the hyperlink to add Email.
4	Add Bank	Users must click the hyperlink to add bank details.
5	Add Superior Advisor	Users must click the hyperlink to add superior advisor details.
6	Add Office Affiliation	Users must click the hyperlink to add office affiliation. Every profile (Person) needs to be affiliated to an office.
7	Check Profile Activation Edits	Users must click the hyperlink to Check profile activation edits. This is to perform validation check; system will not allow completion of profile until the validation check criteria are not

Serial Number	Field Name	Notes
		completed.

Clicking on the **Done** Button will take the user to:

If 'Run Profile Activation Edit' option is checked

- The user will be navigated to the **Profile Update Message** page. After the user clicks on **OK**, the data for the advisor profile will be saved and the Advisor number will be created.

If 'Run profile Activation Edit' option is un-checked

- The data for the advisor profile will be saved and the Advisor number will be created.



The Indexer must enter payment details in the **Initial Premium Receipt** screen. Cheque payment details for multiple cheques must be added using **Add Another Cheque** button. Once the profile is made as 'Active', the advisor will be allowed to sell policies.



If the profile is of type '**Direct Agent**', the profile will be created in the **Pending** status. Mandatory training for those advisors will have to be updated in the '**Training**' tab. Also, License needs to be added to the profiles to make them Active.



After the profile is created for an Advisor, scanning will be done (this will be handled by ECMS).

3.7 Scanning Documents Using the ECMS



The Scanning Assistant scans all the documents at DO (Divisional Office) by performing the steps below.

Checks that the bundles are correctly marked with their codes and are as per the list attached.

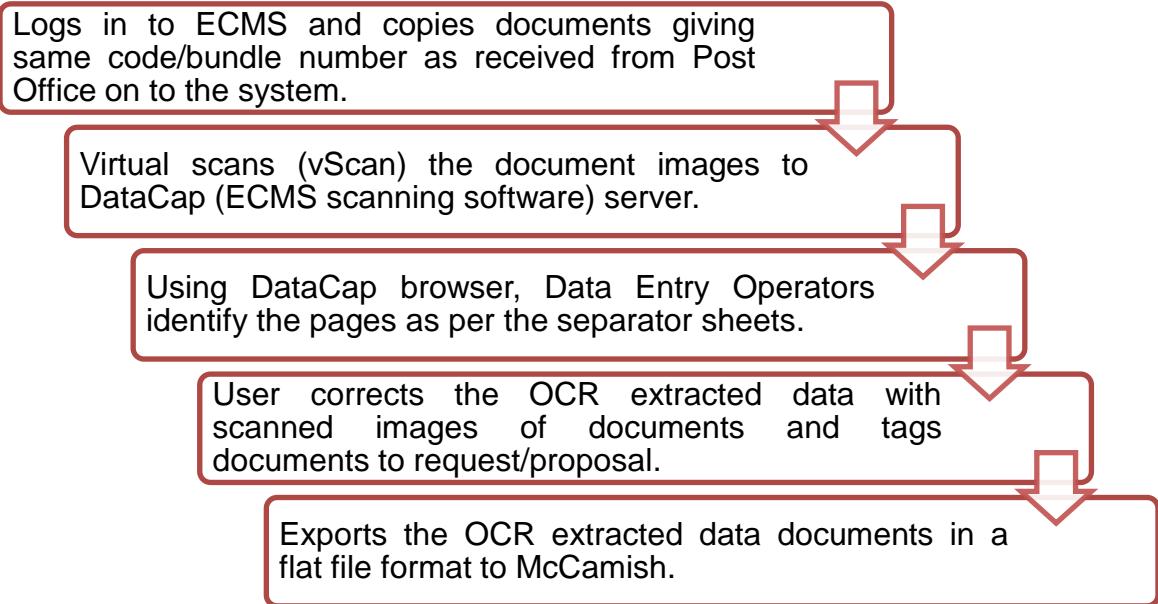
Adds separator sheets with barcode markings between and within the set of documents.

Scans documents and saves images labeled as per the scanners naming convention on to the local desktop.

Checks images for clarity and confirms that all documents are scanned.



Separator sheets allow the ECMS system to separate each page based on request type and supporting document category. These sheets are reusable, as are the barcodes printed on them.



DataCap web service must be pre-installed on each Desktop



Desktop operator will also be allowed to perform operations like page identification and verification on the other batches while documents get uploaded in the background.



After the scanning is completed, a mail alert will be sent to the concerned DSP/ASP (HQ) making him aware of the new profile created. Since, the new profile for all the advisors apart from Direct Agent will be created in Active status; DSP/ASP (HQ) will check all the documents and the details entered.



For a Direct Agent profile to be moved to Active status, DSP/ASP (HQ) would require to enter the provisional license details. Provisional license details will be generated by an external system and will be updated in PMACS® manually. Once license details are entered, profile status will become active (provided the training is completed).



In case the profile is moved to Pending status and the reason in the status reason dropdown is selected as Documents awaited/ Discrepancy found, a letter will be generated automatically to be sent to the advisor with reference to the documents pending.

Section 4: Advisor Profile Management

4.1 Advisor Find



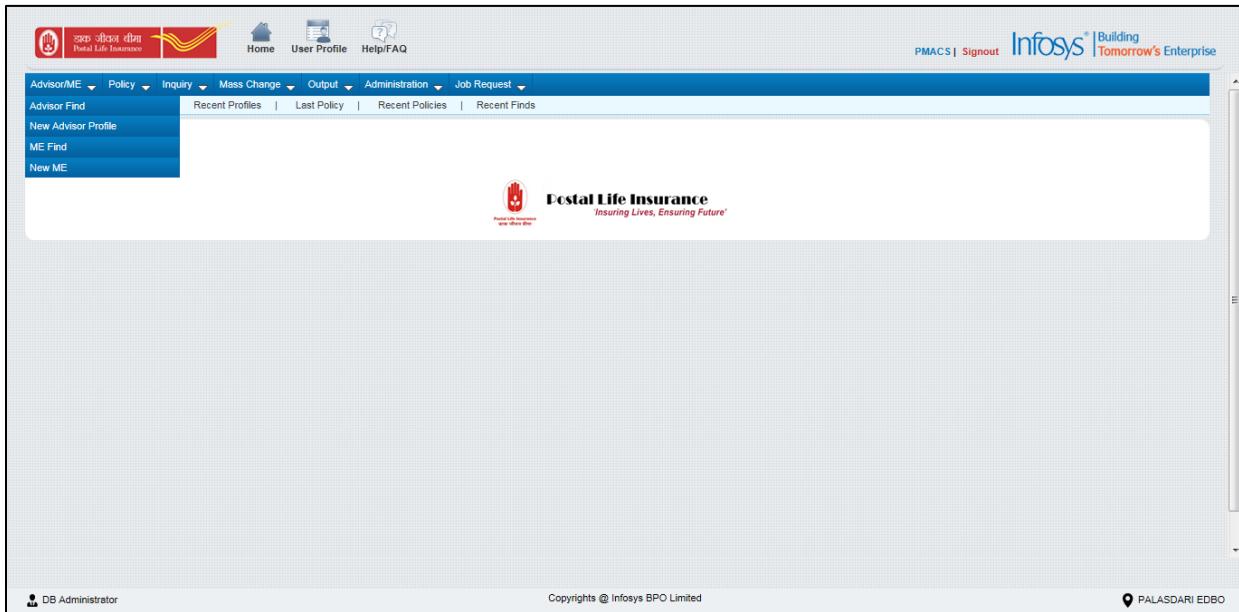
The **Advisor Find** option will help the user to find Advisor profiles which matches the search criteria such as First Name, Last Name, Advisor Profile #, Advisor Coordinator etc.



PMACS® users can access the **Advisor Find** option on the top of the page menu bar under the **Advisor/ME** Option.



The screenshot below shows the **Advisor Profile Find** page. The table that follows provides information on the important elements of this page.





Advisor Find



Page Elements: Advisor Find Details

Serial Number	Field Name	Notes
1	Search Type	Users can select the search type from the drop-list. (PMACS Default will be the default selected option.)
2	People Only	This radio button will be selected by default on this page. It is used to filter the profiles of Category “Persons”.
3	Corporates/Groups Only	When Corporates/Groups Only radio button is selected, the Last name, First Name and Middle name fields will disappear and Advisor Name field will appear. It is used to filter the profiles of Category “Corporates/Groups Only”.
4	Both	When Both radio button is selected, the Last name, First Name and Middle name fields will



Serial Number	Field Name	Notes
		disappear and Advisor Name field will appear. It is used to filter the profiles of Category “Persons” and “Corporates/Groups”.
5	Advisor name	Advisor Name field will appear only when the radio button for Corporates/Groups Only or Both is selected. It is used to find the Advisor using Advisor Name.
6	Last Name	Last Name field will appear only when the radio button for People Only is selected. It is used to find the Advisor using Last Name.
7	First Name	First Name field will appear only when the radio button for People Only is selected. It is used to find the Advisor using First Name.
8	Middle Name	Middle Name field will appear only when the radio button for People Only is selected. It is used to find the Advisor using Middle Name.
9	Distribution Channel	Users must click the arrow to open the drop-down and select the required value. It is used to find the Advisor using Distribution Channel.
10	Advisor Profile #	Users can enter the Advisor Profile Number in the text box. It is used to find the Advisor using Advisor Profile Number.
11	Advisor Coordinator	‘Find’ push button is attached to the Advisor Coordinator text box for searching for an Advisor Coordinator. This push button will navigate the user to Advisor Coordinator Find page.
12	Superior Advisor Find Filter	Users must click the arrow to open the drop-down and select the required value. It is used to find the Advisor using Superior



Serial Number	Field Name	Notes
		Advisor.
13	Superior Advisor	'Find' push button is attached to the Superior Advisor text box for searching for a Superior Advisor. This push button will navigate the user to Advisor Profile Find page on which the Superior Advisor option will not be there and rest everything will be same as Advisor Find Page .
14	Profile Type	Users must click the arrow to open the drop-down and select the required value. It is used to find the Advisor using Profile Type.
15	Contract holders Only	Users can click on the check box for selecting the option ' Contract holders Only '. It is used to find the Advisor using Contract holders Only.
16	Status	Users must click the arrow to open the drop-down and select the required value. It is used to find the Advisor using Status.
17	License #	Users must enter the License Number in the text box provided. It is used to find the Advisor using License number.
18	External Advisor #	Users can enter the External Advisor Number in the text box provided. It is used to find the Advisor using External Advisor number.
19	External Number Type	Users must click the arrow to open the drop-down and select the required value. It is used to find the external Advisor using External Number type.
20	Address State	Users must click the arrow to open the drop-down and select the required value. It is used to find the Advisor using Address State.



Serial Number	Field Name	Notes
21	Address Type	<p>Users must click the arrow to open the drop-down and select the required value.</p> <p>It is used to find the Advisor using Address Type.</p>
22	Phone #	<p>Users must click the arrow to open the drop-down and select the required value.</p> <p>It is used to find the Advisor using Phone Number.</p>
23	Phone Type	<p>Users must click the arrow to open the drop-down and select the required value.</p> <p>It is used to find the Advisor using Phone Type.</p>
24	Office Code	<p>Users can enter the Office Code in the text box provided.</p> <p>It is used to find the Advisor using Office Code.</p>
25	Office Type	<p>Users must click the arrow to open the drop-down and select the required value.</p> <p>It is used to find the Advisor using Office Type.</p>
26	Advisor Undergoing Training	<p>Users must click on the check box for selecting the option 'Advisor Undergoing Training'.</p> <p>It is used to find the Advisor who are undergoing training.</p>
27	Advisor Coordinator Only	<p>Users must click on the check box for selecting the option 'Advisor Coordinator Only'.</p> <p>It is used to find the Advisor Coordinator.</p>
28	All Dates	All Dates are selected as default.
29	Status Date	<p>When the Status Date radio button is selected, a date range would appear as shown below:</p> <p style="text-align: center;">From <input type="text"/> To <input type="text"/></p> <p>All the advisor profiles with the status as selected falling within the date range as specified will be shown in the searched results.</p>

Serial Number	Field Name	Notes
30	License Date	<p>When the License Date radio button is selected, a date range would appear as shown below:</p> <p style="text-align: center;">From <input type="text"/> To <input type="text"/> </p> <p>All the advisor profiles with the License date falling within the date range as specified will be shown in the searched results.</p>
31	Search	<p>Users must click the Search button to go to the Profile List Page.</p> <p>After pressing the Search button, if the search criteria entered returns more than 10,000 rows as results, then a validation message will appear as 'You Query returned XXXXXXXX rows, and exceeds the maximum query size of 10,000 rows. Please make your search more specific and try again' and the user will be returned to the current page.</p>
32	Clear	Users must click the Clear button to clear all the search criteria as entered.

4.2 Profile List



The screenshot below shows the **Profile List** page. It displays match which fulfills the specified criteria. The table that follows provides information on the important elements of this page.



Profile List

The profiles that match the specified criteria are displayed below. Click the Detail hyperlink in the Action column to view the details.

[Return to advisor Profile Find](#) | [Export to Excel](#)

Advisor #	Advisor Name	Profile Type	PAN Number	Advisor Coordinator	Status	Person	Action
DA00051458	Ankit Jain	Direct Agent		Surjeeth Halan	Active		Detail
DA00166809	Anurag Jain	Direct Agent		Meenut DSP	Active		Detail
DE00000110	Deep Jain	Departmental Employee		22ndJulyMGAgent	Pending		Detail
DE00000109	Deep Jain	Departmental Employee - ASPOs/ASRMs	ADFPS1246V	22ndJulyMGAgent	Pending		Detail
DE00000111	dipti Jain	Departmental Employee	ASDPF1234V	22ndJulyMGAgent	Pending		Detail
CPMG00000085	Dipti Jain	CPMG	ASDPG1234B		Pending		Detail
DO00044592	Gaurav Jain	Development Officer		Bangalore West Division DSP	Active		Detail
DA00236462	Jolly Jain	Direct Agent	LLLPB7414H	Aurangabad Division DSP	Active		Detail
DA00054030	kalpesh Jain	Direct Agent	BDDPF1332R	Kumar Navin	Active		Detail
DO00047183	Nishant Jain	Development Officer		Udaipur Division DSP	Active		Detail
DA00062079	Saurabh Jain	Departmental Employee	DEDPS4678D	Aurangabad Division DSP	Active		Detail

[Return to advisor Profile Find](#) | [Export to Excel](#)

Profile List



Page Elements: Advisor Profile List Details

Serial Number	Field Name	Notes
1	Advisor #	Advisor Number of the profile is displayed.
2	Advisor Name	Advisor Name of the profile is displayed.
3	Profile Type	Profile Type of the profile is displayed.
4	PAN Number	PAN Number of the profile is displayed.
5	Advisor Coordinator	Advisor Coordinator name will be shown as a hyperlink and when clicked user will be navigated to the Profile – Maintenance Basic page.
6	Status	Shows the status of the profile.
7	Action	This column will have a <i>Detail</i> hyperlink in each row.
8	Return to Advisor Profile Find	Return to Advisor Profile Find hyperlink is above the search results. This will take the

Serial Number	Field Name	Notes
		user to the Advisor Profile Find page.
9	Export to Excel	This will export the search results in an excel sheet.
10	Detail	Users must click the Detail Hyperlink in the search results row to go to the Profile Maintenance – Basic page of the Advisor.

4.3 Profile Maintenance – Basic



PMACS® application helps users to manage advisors and maintain all of the information related to advisors.



PMACS® users can access the **Profile maintenance – Basic** page through the **Advisor Find** option on the top of the page menu bar from the **Advisor/ME** Option. Also, if a user clicks on the **Last Profile** option on the bar just below the Menu bar, the **Profile Maintenance – Basic** page will appear.



For any Advisor profile, **Profile Maintenance – Basic** page will be a *default* page.

The Profile Maintenance-Basic page has two components:

Page header tile that displays the key profile data elements

Horizontal Menu bar that enables user to maintain advisor profile information



The screenshot below shows **Menu Bar and Profile Maintenance – Basic** page. The table that follows provides information on the important elements of this page.

Postal Life Insurance Home User Profile Help/FAQ

Advisor/ME Policy Inquiry Mass Change Output Administration Job Request

Home | Last Profile Recent Profiles Last Policy Recent Policies Recent Finds

PMACS | Signout Infosys Building Tomorrow's Enterprise

Menu Bar

Profile Maintenance - Basic
View the Basic information for the selected profile.

Advisor Name	ALOK SINGH	Advisor Coordinator	Alok Singh	Profile Type	Direct Agent - Ex Servicemen
Advisor#	DA00000108		Status	Active	Update

Profile/Advisor Detail

Advisor Name	Mr. ALOK SINGH
Title	None
Designation/Rank	
Service Number	

PAN Number Information

PAN Number	DRRPR1211R
------------	------------

Status Information

Status	Active
Reason	None
Status Date	19/12/2013
Effective Date	19/12/2013
Termination Date	
Advisor Undergoing Training	N

Distribution Channel

Distribution Channel	Primary	Start Date	End Date
India Post	Y	19/12/2013	

External Number

Type	Number	Series
------	--------	--------

Product Class

Product Class	Primary	Start Date	End Date
TRADITIONAL	Y	19/12/2013	
ULIP	N	19/12/2013	

Page Header

Horizontal Menu Bar

Profile Maintenance – Basic



Page Elements: Profile Maintenance – Basic Details

Serial Number	Hyperlinks	Functions
---------------	------------	-----------

Serial Number	Hyperlinks	Functions
1	Update hyperlink in Advisor Name grid	Users must click the Update hyperlink to go to the Profile Maintenance – Name Update page.
2	Update hyperlink in PAN Number Information grid	Users must click the Update hyperlink to go to the Profile Maintenance – PAN Number Information Update page.
3	Update hyperlink in Status Information grid	Users must click the Update hyperlink to go to the Status Information Update page.
4	Update hyperlink in Personal Information grid	Users must click the Update hyperlink to go to the Profile Maintenance – Personal Information page.
5	Add hyperlink for each row in Distribution channel grid	Users must click the Update hyperlink to go to the Profile Maintenance – Distribution Channel page.
6	Add hyperlink for each row in External Number grid	Users must click the Update hyperlink to go to the Profile Maintenance – External Number Add/Update page.
7	Add hyperlink for each row in Product Class grid	Users must click the Update hyperlink to go to the Profile Maintenance – Product Class Add/Update page.

4.4 Profile Maintenance – Name Update



Profile Maintenance – Name Update page will allow the user to update the name information for the current profile.



User will be navigated to **Profile Maintenance – Name Update** page by clicking on the **Update** link on the **Advisor Name** grid on the **Profile Maintenance – Basic** page.



The screenshot below shows **Profile Maintenance – Name Update** page. The table that follows provides information on the important elements of this page.

The screenshot shows the 'Profile Maintenance - Name Update' page. At the top, there are navigation links for Home, User Profile, Help/FAQ, PMACS, Signout, and Infosys. Below the header, a sub-navigation bar includes Advisor/ME, Policy, Inquiry, Mass Change, Output, Administration, and Job Request. Under the main title, it says 'Update the name for the current profile.' A table displays advisor details: Advisor Name (ALOK SINGH), Advisor Coordinator (Alok Singh), Profile Type (Direct Agent - Ex Servicemen), Advisor# (DA00000108), Status (Active). Below the table are tabs for Profile/Advisor Detail, Relationships, Regulatory Compliance, Commission Admin, and Inquiry. A form titled 'Update Profile Name' contains fields for Last Name (SINGH), First Name (ALOK), Middle Name, Title (Mr.), Professional Title (None), Designation/Rank, and Service Number. Buttons for Submit and Cancel are at the bottom of the form.

Profile Maintenance – Name Update



Page Elements: Profile Maintenance – Name Update Details

Serial Number	Field Name	Notes
1	Last Name	Users must enter the last name of the advisor in the text box provided.
2	First Name	Users must enter the first name of the advisor in the text box provided.
3	Middle Name	Users must enter the middle name of the advisor in the text box provided.
4	Title	Users must select the title of the advisor from the drop-down list.
5	Professional Title	Users must select the Professional Title of the advisor from the drop-down list
6	Designation/Rank	Users must select the designation of the advisor from the drop-down list.

Serial Number	Field Name	Notes
7	Service Number	Users must enter the service number in the text box provided.
8	Submit	Users must click the Submit button to go to the Profile Maintenance – Basic page after the changes are saved.
9	Cancel	Users must click the Cancel button to go to the Profile Maintenance – Basic page without any changes being saved.

4.5 Profile Maintenance – PAN Information Update



Profile Maintenance – PAN Information Update page will allow the user to update PAN Number Information for the current profile.



User will be navigated to this page by clicking on the **Update** link on the **PAN Number Information** grid on the **Profile Maintenance – Basic** page.



The screenshot below shows **Profile Maintenance – PAN Information Update** page. The table that follows provides information on the important elements of this page.



The screenshot shows the 'Profile Maintenance - PAN Information Update' page. At the top, there are navigation links for Home, User Profile, and Help/FAQ. On the right, there are links for PMACS, Signout, and Infosys. The main content area has tabs for Advisor/ME, Policy, Inquiry, Mass Change, Output, Administration, and Job Request. Below these are links for Home, Last Profile, Recent Profiles, Last Policy, Recent Policies, and Recent Finds. The main form is titled 'Profile Maintenance - PAN Information Update' and contains instructions to 'Update the PAN information below.' It includes a table with columns for Advisor Name (ALOK SINGH), Advisor# (DA00000108), Advisor Coordinator (Alok Singh), Profile Type (Direct Agent - Ex Servicemen), and Status (Active). Below the table are tabs for Profile/Advisor Detail, Relationships, Regulatory Compliance, Commission Admin, and Inquiry. A section titled 'Update PAN Information' contains a 'PAN Number' input field with the value 'D R R P R 1 2 1 1 R'. There are 'Submit' and 'Cancel' buttons at the bottom.

Profile Maintenance – PAN Information Update



This screenshot shows the 'Update PAN Information' section. It features a blue header bar with the text 'Update PAN Information'. Below it is a table with a single row and multiple columns. The first column is labeled 'PAN Number' and contains the sample value 'D R R P R 1 2 1 1 R'. The other columns are mostly empty blue boxes.

PAN Number Sample



Permanent account number will be in the format as shown above and format will be stored in the system as predefined one. ([Refer to section 3.5](#))

Page Elements: Profile Maintenance – PAN Information Update Details

Serial Number	Buttons	Functions
1	Submit	Users must click the Submit button to go to the Profile Maintenance – Basic page after the changes are saved.
2	Cancel	Users must click the Cancel button to go to the Profile Maintenance – Basic page without any changes being saved.



PAN number is not mandatory.

4.6 Profile Maintenance – Status Information Update



Profile Maintenance – Status Information Update will help the user to update the Status Information for the current profile.



User will be navigated to this page by clicking on the **Update** link on the **Status Information** grid on the **Profile Maintenance – Basic** page.



The screenshot below shows **Status Information Update** page. The table that follows provides information on the important elements of this page.

The screenshot shows the 'Status Information Update' page. At the top, there's a navigation bar with links like Home, User Profile, Help/FAQ, Advisor/ME, Policy, Inquiry, Mass Change, Output, Administration, Job Request, PMACS, Signout, and Infosys logo. Below the navigation is a sub-navigation menu with links for Home, Last Profile, Recent Profiles, Last Policy, Recent Policies, and Recent Finds. The main content area is titled 'Status Information Update' with the sub-instruction 'Update the status information below.' It displays a table with advisor details: Advisor Name (ALOK SINGH), Advisor# (DA00000108), Advisor Coordinator (Alok Singh), Profile Type (Direct Agent - Ex Servicemen), and Status (Active). Below the table are tabs for 'Profile/Advisor Detail', 'Relationships', 'Regulatory Compliance', 'Commission Admin', and 'Inquiry'. A large form titled 'Add/Update Status Information' is centered, containing fields for Status (Active), Status Reason (None), Status Date (19/12/2013), Effective Date (19/12/2013), and Termination Date. At the bottom of the form are 'Submit' and 'Cancel' buttons.

Status Information Update



Page Elements: Status Information Update Details



Serial Number	Field Name	Notes
1	Status	Status will be displayed as selected on the previous screen.
2	Status Reason	Users must select the status reason from the drop-down list. The list will change depending on the Status selected.
3	Status Date (DD/MM/YYYY)	For Status as Active: Status Date defaulted to the profile creation date. For Status as Pending/Suspended/Terminated: Date defaulted to current date. The purpose of this date is to identify the profile creation date.
4	*Effective Date (DD/MM/YYYY)	For Status as Active/ Pending: Date defaulted to the profile creation date and is editable. For Status as Suspended/ Terminated: Date defaulted to the profile creation date and is non-editable. The purpose of the date is to identify the date from which the profile is effective/suspended or terminated.
5	*Termination Date (DD/MM/YYYY)	For Status as Active/ Pending/Suspended: Field is disabled For Status as Terminated: Field is enabled and mandatory Profiles which are already suspended, this field will be disabled.
6	Submit	Users must click the Submit button to go to the Profile Maintenance – Basic page after the changes are saved.
7	Cancel	Users must click the Cancel button to go to the Profile Maintenance – Basic page without any changes being saved.



Resolving Important Error Messages

Critical Error Messages and Required Action

Serial Number	Condition	Error Message	Required Action
1	If the status is selected as Active: If the status reason is not selected and Submit button is pressed.	Please select a status reason.	Users must enter the status reason.
2	If the status is selected as Active: If the Effective date is not filled and Submit button is pressed.	Please enter a valid Effective Date.	Users must enter the effective date.
3	If the status is selected as Suspended: If the status reason is not selected and Submit button is pressed.	Please select a status reason.	Users must enter the status reason.

4.7 Profile Maintenance – Personal Information



Profile Maintenance – Personal Information Update will allow the user to update the personal information of an advisor.



User will be navigated to this page by clicking on the **Update** link on the **Personal Information** grid on the **Profile Maintenance – Basic** page.



The screenshot below shows **Profile Maintenance – Personal Information Update** page. The table that follows provides information on the important elements of this page.

Profile Maintenance – Personal Information Update



Page Elements: Profile Maintenance – Personal Information Update Details

Serial Number	Field Name	Notes
1	Gender	Allows the user to enter/edit the gender of the advisor from the drop-down list.

Serial Number	Field Name	Notes
2	Category	Allows the user to enter/edit the category of the advisor from the drop-down list.
3	Marital Status	Allows the user to enter/edit the marital status of the advisor from the drop-down list.
4	*Date of birth (DD/MM/YYYY)	Allows the user to enter the date of birth of an advisor.
5	*Date of death (DD/MM/YYYY)	Allows the user to enter the date of death of an advisor.
6	Submit	Users must click the Submit button to go to the Profile Maintenance – Basic page after the changes are saved.
7	Cancel	Users must click the Cancel button to go to the Profile Maintenance – Basic page without any changes being saved.

4.8 Profile Maintenance – Distribution Channel

Add/Update



Profile Maintenance – Distribution Channel Add/Update will allow the user to update the Distribution channel for a particular profile.



User will be navigated to this page by clicking on the **Update** link on the **Distribution Channel** grid on the **Profile Maintenance – Basic** page.



The screenshot below shows **Profile Maintenance – Distribution Channel Add/Update** page. The table that follows provides information on the important elements of this page.



Profile Maintenance - Distribution Channel Add/Update
Add/Update a Distribution Channel for the current profile.

Advisor Name	ALOK SINGH	Advisor Coordinator	Alok Singh	Profile Type	Direct Agent - Ex Servicemen
Advisor#	DA00000108			Status	Active

Profile/Advisor Detail | **Relationships** | **Regulatory Compliance** | **Commission Admin** | **Inquiry**

Add/Update Distribution Channel

Distribution Channel	India Post
Start Date	19/12/2013
End Date	

Submit | **Cancel**

Profile Maintenance – Distribution Channel Add/Update**Page Elements: Profile Maintenance – Distribution Channel Add/Update Details**

Serial Number	Field Name	Notes
1	Distribution Channel	The current selection will be shown as default.
2	*Start Date (DD/MM/YYYY)	Date is defaulted to the date when that particular distribution channel was added, however the field is editable. The purpose of this field is to identify the date from which distribution channel is started.
3	End Date (DD/MM/YYYY)	End Date on which the particular distribution channel will be active. The purpose of this field is to identify the date from which distribution channel will be ended. User can submit without entering this End date. However, this end date can be updated at any later point of time.
4	Submit	Users must click the Submit button to go to the Profile Maintenance – Basic page after the changes are saved.

Serial Number	Field Name	Notes
5	Cancel	Users must click the Cancel button to go to the Profile Maintenance – Basic page without any changes being saved.

4.9 Profile Maintenance – External Number

Add/Update



Profile Maintenance – External Number Add/Update will allow the user to update the details regarding the external number for that profile.



User will be navigated to this page by clicking on the **Update** link on the **External Number** grid on the **Profile Maintenance – Basic** page.



The screenshot below shows **Profile Maintenance – External Number Add/Update** page. The table that follows provides information on the important elements of this page.

Advisor Name	ALOK SINGH	Advisor Coordinator	Alok Singh	Profile Type	Direct Agent - Ex Servicemen								
Advisor#	DA00000108			Status	Active								
Profile/Advisor Detail		Relationships		Regulatory Compliance									
				Commission Admin									
Add/Update External Number <table border="1"> <tr> <td>External Number Type</td> <td><input type="text"/></td> </tr> <tr> <td>External Number Series</td> <td><input type="text"/> There is no External Number Series available.</td> </tr> <tr> <td>External Number</td> <td><input type="text"/> 0 digits/characters</td> </tr> <tr> <td>On Policy/Group</td> <td><input type="checkbox"/></td> </tr> </table>						External Number Type	<input type="text"/>	External Number Series	<input type="text"/> There is no External Number Series available.	External Number	<input type="text"/> 0 digits/characters	On Policy/Group	<input type="checkbox"/>
External Number Type	<input type="text"/>												
External Number Series	<input type="text"/> There is no External Number Series available.												
External Number	<input type="text"/> 0 digits/characters												
On Policy/Group	<input type="checkbox"/>												
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>													

Profile Maintenance – External Number Add/Update



The table provided below gives information on the different screen elements available on this page along with their description.

Page Elements: Profile Maintenance – External Number Add/Update Details

Serial Number	Field Name	Notes
1	External Number Type	Users must select the external number type from the drop-down list.
2	External Number Series	Gives the external number details (if present)
3	External Number	Users must enter the external number from the drop-down list.
4	On Policy/Group	Users must select the check box to select the On Policy/Group.
5	Submit	Users must click the Submit button to go to the Profile Maintenance – Basic page after the changes are saved.
6	Cancel	Users must click the Cancel button to go to the Profile Maintenance – Basic page without any changes being saved.

4.10 Profile Maintenance – Product Class Add/Update



Profile Maintenance – Product Class Add/Update will allow the user to update the details regarding the product class for that profile.



User will be navigated to this page by clicking on the **Update** link on the **Product Class** grid on the **Profile Maintenance – Basic** page.



The screenshot below shows **Profile Maintenance – Product Class Add/Update** page. The table that follows provides information on the important elements of this page.

Profile Maintenance – Product Class Add/Update



The table provided below gives information on the different screen elements available on this page along with their description.

Page Elements: Profile Maintenance – Product Class Add/Update Details

Serial Number	Field Name	Notes
1	Product Class	The current selection will be shown as default.
2	*Start Date (DD/MM/YYYY)	Date defaulted to the date when that particular product class was added, however the field is editable. This date is the beginning date from which the product is operational.
3	End Date	End Date is the last date on which profile will be in

Serial Number	Field Name	Notes
	(DD/MM/YYYY)	active status. However it is not mandatory at the time of adding. User can update at any later point of time as well.
4	Submit	Users must click the Submit button to go to the Profile Maintenance – Basic page after the changes are saved.
5	Cancel	Users must click the Cancel button to go to the Profile Maintenance – Basic page without any changes being saved.

4.11 Profile Maintenance – Address



Through **Profile/Advisor Detail** tab, the user will be able to add basic details required for an advisor.



The screenshot below shows **Profile/Advisor Detail** tab.

Advisor Name	Alok Singh	Advisor Coordinator	Profile Type	Divisional Superintendent
Advisor#	AC00000107		Status	Terminated

Profile/Advisor Detail Tab



The **Profile Maintenance-Address** page can be accessed by clicking **Address** on the **Profile/Advisor Detail** menu bar.



The screenshot below shows **Profile Maintenance – Address** tab. The table that follows provides information on the important elements of this page.

The screenshot shows the 'Profile Maintenance - Address' page. At the top, there's a navigation bar with links like Home, User Profile, Help/FAQ, PMACS, Signout, and Infosys. Below the navigation is a sub-navigation bar with links for Advisor/ME, Policy, Inquiry, Mass Change, Output, Administration, and Job Request. Under the main title, it says 'Profile Maintenance - Address' and 'View the address information for the current profile.' There are two address blocks:

Advisor Name	Alok Singh	Advisor Coordinator	Profile Type	Divisional Superintendent
Advisor#	AC00000107		Status	Terminated

Below the table are tabs for Profile/Advisor Detail, Relationships, Regulatory Compliance, Commission Admin, and Inquiry. The 'Relationships' tab is active. It contains a 'Permanent (Default)' section with an address for 'abgd REyki Mandla 124567 Madhya Pradesh INDIA'. A note says '* Linked to 1 Other Profile(s)'. There's also an 'Official' section with an address for 'ABCH QWERT Mandla 123456 Madhya Pradesh INDIA'. At the bottom of the page are buttons for 'Add New Address', 'Mark Undeliverable', 'Update', and 'Delete'.

Profile Maintenance - Address



Different blocks for different addresses are mentioned below.

Official

Permanent

Communication



These blocks will have the address as entered through the **Add New Address** hyperlink. Also, block for any address would appear only if the address for that address type block has been entered.

Page Elements: Profile Maintenance-Address Details

Serial Number	Hyperlinks	Functions
1	Add New Address	This hyperlink will be on the top and below the blocks for the address. Users must click the hyperlink to go to the Profile Maintenance – Address Add/Update page.
2	Mark Undeliverable	Users must click the Mark Undeliverable hyperlink to mark the address as undeliverable.
3	Update	Users must click the Update hyperlink to update the Address.
4	Delete	Users must click the Delete hyperlink to delete the Address.
5	Mark Default	Users must click the Mark Default hyperlink to make the particular address type as default. <ul style="list-style-type: none"> ■ This hyperlink will appear only if the concerned address type is not marked as default in PMACS® for that profile. ■ This hyperlink will not appear on the box if the address type is already marked as default.

4.11.1 Profile Maintenance – Address Add/Update



Users will be able to add address details for an advisor through **Profile Maintenance – Address Add/Update** page.



The screenshot below shows **Profile Maintenance – Address Add/Update** page. The table that follows provides information on the important elements of this page.



The screenshot shows the 'Profile Maintenance - Address Add/Update' page. At the top, there are navigation links for Home, User Profile, Help/FAQ, Advisor/ME, Policy, Inquiry, Mass Change, Output, Administration, and Job Request. Below these are links for Home, Last Profile, Recent Profiles, Last Policy, Recent Policies, and Recent Finds. On the right, there are PMACS Signout and Infosys Building Tomorrow's Enterprise links. The main form has fields for Advisor Name (Alok Singh), Advisor# (AC00000107), Advisor Coordinator, Profile Type (Divisional Superintendent), Status (Terminated), and an Update button. Below this is a tabbed section with 'Profile/Advisor Detail', 'Relationships', 'Regulatory Compliance', 'Commission Admin', and 'Inquiry'. A large 'Add/Update Address' section contains fields for Address Type (dropdown), Address, Village, Taluka, City, Country (read-only India), State (dropdown), District (dropdown), and Pin Code. There are also 'Submit' and 'Cancel' buttons.

Profile Maintenance – Address Add/Update



Page Elements: Profile Maintenance – Address Add/Update Details

Serial Number	Field Name	Notes
1	Address Type	Users must select the Address Type from the drop-down list.
2	Address	Users must enter the Address in the text box provided.
3	Village	Users must enter the Village name in the text box provided.
4	Taluka	Users must enter the Taluka name in the text box provided.
5	City	Users must enter the City name in the text box provided.
6	Country	Country will reflect as India in a read-only text box.
7	State	Users must select the State from the drop-down list.
8	District	Users must select the District from the drop-

Serial Number	Field Name	Notes
		down list.
9	Pin Code	Users must enter the Pin Code in the text box provided.
10	Submit	Users can click the Submit button to initiate the edit process. If the edit process is not successful, the user is returned to the current page to correct the entry. If edits are passed, then the user is taken back to the previous page which is Profile Maintenance – Address page.
11	Cancel	Users must click the Cancel button to go to the Profile Maintenance – Address page.

4.12 Profile Maintenance – Phone



The **Profile Maintenance-Phone** page enables to add, update or delete phone information for an advisor profile.



The **Profile Maintenance-Phone** page can be accessed by clicking **Phone** on the **Profile/Advisor Detail** menu bar.



The screenshot below shows **Profile Maintenance – Phone** page. The table that follows provides information on the important elements of this page.



Profile Maintenance - Phone
View the phone information for the current profile.

Advisor Name	Alok Singh	Advisor Coordinator	Profile Type	Divisional Superintendent
Advisor#	AC00000107		Status	Terminated

Profile/Advisor Detail | Relationships | Regulatory Compliance | Commission Admin | Inquiry

Add New Phone Number

Official Landline (Default)	
1	022-55555158 Ext.

Add New Phone Number | Update · Delete

Profile Maintenance – Phone



Different blocks for different phone number types are mentioned below.

Official Landline

Resident Landline

Official Mobile

Resident Mobile



These blocks will have the Phone information as entered through the **Add New Phone Number** hyperlink. Also, block for any Phone type would appear only if the Phone details for that Phone type block has been entered.

Page Elements: Profile Maintenance – Phone Details

Serial Number	Hyperlinks	Functions
1	Update	Users must click the Update hyperlink to update the Phone details.

Serial Number	Hyperlinks	Functions
2	Delete	Users must click the Delete hyperlink to delete the Phone details.

4.12.1 Profile Maintenance – Phone Add/Update



Users can click on the **Add New Phone Number** hyperlink to display the phone type dropdown on the **Profile Maintenance – Phone Add/Update** page. Once the phone type is selected, the box formats for entering the phone numbers will appear accordingly.



The screenshot below shows **Profile Maintenance – Phone Add/Update** page. The table that follows provides information on the important elements of this page.

Advisor Name	Alok Singh	Advisor Coordinator	Profile Type	Divisional Superintendent	
Advisor#	AC00000107		Status	Terminated	
Profile/Advisor Detail		Relationships	Regulatory Compliance	Commission Admin	Inquiry
Add Phone Number Phone Type: Resident Landline Phone Number: () Extension:					

Profile Maintenance – Phone Add/Update



Page Elements: Details for Profile Maintenance – Phone Add/Update

Serial Number	Field Name	Notes
1	Phone Type	This will display the phone type selected to be updated like Permanent, Communication, Official or Mobile.
2	Phone Number	<ul style="list-style-type: none"> ■ If Phone type is Permanent/ Communication/official then Phone number format should be. STD code in the first text box and phone number in the second text box and the total length of the number should be 11 digits.3 ■ If Phone type is Mobile, then Phone number format should be 'XXXXXXXXXX'.
3	Extension	Users can enter the extension number in the text box provided. It will appear only for the Phone Type as "Permanent/ Communication/ Official"
4	Submit	Users must click the Submit button to initiate the edit process. If the edit process is not successful, the user is returned to the current page to correct the entry. If edits are passed then the user is taken back to the previous page which is Profile Maintenance – Phone page.
5	Cancel	Users must click the Cancel button to return to the Profile Maintenance – Phone page.

4.13 Profile Maintenance – Email



Users can click the **Email** option on the **Profile/Advisor Detail** drop-down menu of the **Profile Maintenance-Basic** page to display the **Profile Maintenance-Email** page.



The screenshot below shows **Profile Maintenance – E-mail** page. The table that follows provides information on the important elements of this page.



Profile Maintenance – Email



Different blocks for different E-Mail Address types are mentioned below.

Official

Permanent

Communication



These blocks will have the E-mail address as entered through the **Add New E-mail Address** hyperlink. Also, block for any E-mail address type would appear only if the E-mail address for that E-mail type block has been entered.

Page Elements: Profile Maintenance – Email Details

Serial Number	Hyperlinks	Functions
1	Update	Users must click the Update hyperlink to update the E-mail address details.

Serial Number	Hyperlinks	Functions
2	Delete	Users must click the Delete hyperlink to delete the E-mail address details.

4.13.1 Profile Maintenance – Email Add/Update



User will be able to add/update email details for an advisor through **Profile Maintenance – Email Add/Update** page.



The screenshot below shows **Profile Maintenance – E-mail Add/Update** page. The table that follows provides information on the important elements of this page.

Profile Maintenance – Email Add/Update



Page Elements: Profile Maintenance – Email Add/Update Details

Serial Number	Field Name	Notes

Serial Number	Field Name	Notes
1	E-mail Type	Users can select the e-mail type from the drop-down list.
2	E-mail Address	Users can enter the e-mail address in the text box provided.
3	Submit	Users must click the Submit button to initiate the edit process. If the edit process is not successful, the user is returned to the current page to correct the entry. If edits are passed then the user is taken back to the previous page which is Profile Maintenance – E-mail page.
4	Cancel	Users must click the Cancel button to go to the Profile Maintenance – E-mail page.

4.14 Profile Maintenance – Authority



The authority for an advisor will automatically be calculated, once License is added. It will also be reflected on **Profile Maintenance – Authority** page. However, user will also have the option to add authority to an advisor profile manually.



Profile Maintenance – Authority page can be accessed by clicking **Authority** from the **Regulatory Compliance** tab. Once clicked, system displays the corresponding lines of authority for the advisor selected.



The screenshot below shows **Profile Maintenance – Authority** page. The table that follows provides information on the important elements of this page.



Postal Life Insurance

Profile Maintenance - Basic
View the Basic information for the selected profile.

Advisor Name	ALOK SINGH	Advisor Coordinator	Alok Singh	Profile Type	Direct Agent - Ex Servicemen
Advisor#	DA00000108			Status	Active
			Update		
Profile/Advisor Detail		Relationships		Regulatory Compliance	
Advisor Name Advisor Name: Mr. ALOK SINGH Title: None Designation/Rank: Service Number:		Authority Insurance Licensing Training		Commission Admin Primary Start Date End Date	
		India Post Y 19/12/2013		Update	
Add					
External Number					
Type	Number	Series	Add		
Product Class					
Product Class	Primary	Start Date	End Date		
TRADITIONAL	Y	19/12/2013		Update	
ULIP	N	19/12/2013		Update	
Add • Change Primary					
PAN Number Information PAN Number: DRRPR1211R					
Update					
Status Information Status: Active Reason: None Creation Date: 19/12/2013					

Regulatory Compliance Tab



Profile Maintenance - Authority
View Advisor Authority data below. Change the filter criteria and click Search to refine the results.

Advisor Name	ALOK SINGH	Advisor Coordinator	Alok Singh	Profile Type	Direct Agent - Ex Servicemen
Advisor#	DA00000108			Status	Active
			Update		
Profile/Advisor Detail		Relationships		Regulatory Compliance	
Add Authority Carrier: <input type="button" value="▼"/> Validation Role: <input type="button" value="▼"/>		Authority Type <input type="button" value="▼"/>		Active Only <input checked="" type="checkbox"/> Search Clear	
Items 1 - 1 of 1 First Prev Next Last Page <input type="text"/> Go					
Carrier	Authority Type	Validation Role	Start Date	End Date	In Use Begin
<input type="button" value="▼"/>	<input type="button" value="▼"/>	<input type="button" value="▼"/>	<input type="button" value="▼"/>	<input type="button" value="▼"/>	<input type="button" value="▼"/>
	Life	Producer/Writing Agent	19/12/2013		19/12/2013
Items 1 - 1 of 1 First Prev Next Last Page <input type="text"/> Go					
Add Authority					

Profile Maintenance – Authority



Page Elements: Profile Maintenance – Authority Details

Serial Number	Field Name	Notes
1	Carrier	Users must select the Carrier type from the drop-down.



Serial Number	Field Name	Notes
		down list.
2	Authority Type	Users must select the Authority Type from the drop-down list. Authority type means which authority the advisor can hold. Eg : Life
3	Validation Role	Users must select the Validation Role from the drop-down list.
4	Active Only	By default, Profiles are selected as Active.

The complete list of Authority available to the advisor will be listed by default on the Authority page. The grid will have the following information:

Page Elements: Profile Maintenance – Authority Details

Serial Number	Field Name	Notes
1	Carrier	Displays the Name of the carrier
2	Authority Type	Displays the Type of authority e.g. Life
3	Validation Role	Displays the Validation role
4	Start Date	Displays the Authority Start date
5	End Date	Displays the Authority End date
6	In Use Begin	Displays the Authority in-use begin date. Default is system date.
7	In Use End	Displays the Authority in-use end date. Default is blank.
8	Action	It has the ' Update ' Hyperlink against each row.
9	Add Authority	If clicked, the system initiates the Add Authority process by displaying the Authority Add/Update page. The link appears both above and below the

Serial Number	Field Name	Notes
		grid.
10	Update	If clicked, the system initiates the update Authority process by displaying the Authority Add/Update page. The link appears on each row in the Action column in the selection list.

4.14.1 Profile Maintenance – Authority Add/Update



Profile Maintenance – Authority Add/Update page allows the user to Add/Update Authority.



The user is navigated to this page once the hyperlink as **Add Authority** or **Update** is clicked on the **Authority** page. All these fields will be disabled and will show the selection as done when the Authority was added, if the **Update** link is clicked on the **Authority** page.



The screenshot below shows **Profile Maintenance – Authority Add/Update** page. The table that follows provides information on the important elements of this page.



Profile Maintenance – Authority Add/Update



Page Elements: Profile Maintenance – Authority Add/Update Details

Serial Number	Field Name	Notes
1	Authority Type	Displays the authority type. Authority type means which authority the advisor can hold. Eg : Life
2	Validation Role	Users must select the validation role from the drop-down list.
3	Carrier	Users must select the Carrier from the drop-down list.
4	Resident Status	(Enabled and Default as Resident) Users must select the Resident Status from the drop-down list.
5	Start date (DD/MM/YYYY)	Date from which Authority of the role (Advisor) begins. Authority of an Advisor begin date identifies for how many days (months), an Advisor is active.



Serial Number	Field Name	Notes
6	End Date (DD/MM/YYYY)	Date on which Authority of the role (Advisor) ends. Date on which Authority of an Advisor ends, which identifies for how many days (months), an Advisor is active.
7	Submit	Users must click the Cancel Button to stop the Add or Update process and returns the user to the Authority tile.
8	Cancel	Users must click the Submit button to initiate the edit process. If unsuccessful, the user is returned to the page to correct. If successful, the system saves the changes to the database, creates history and returns the user to the Authority tile.

4.15 Profile Maintenance – Insurance Licensing



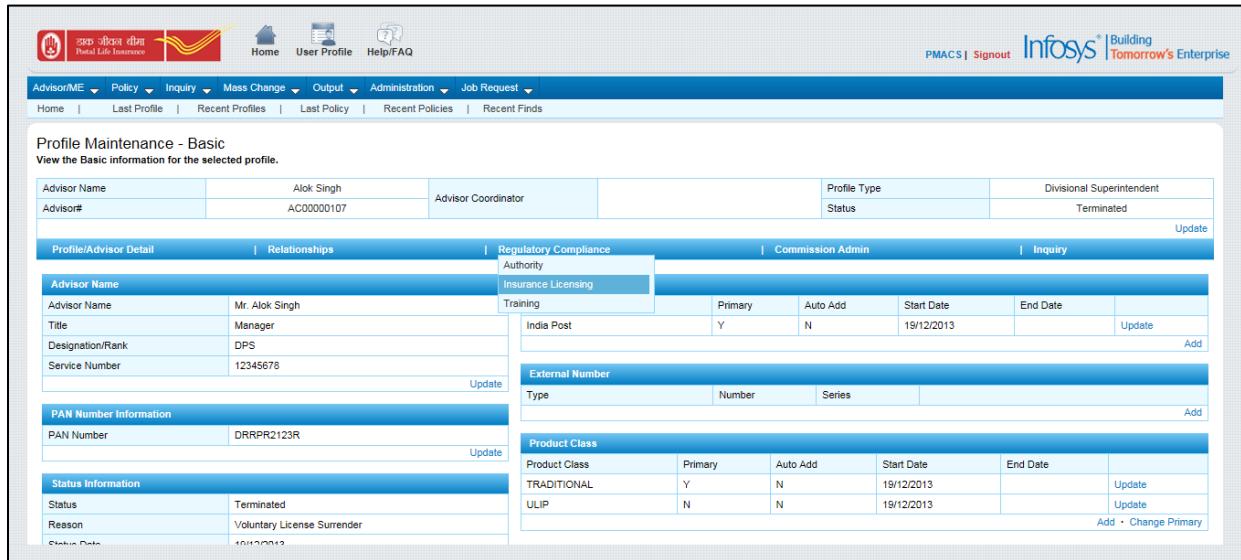
Profile Maintenance – Insurance Licensing page will display the summary of the license an Advisor.



Profile Maintenance – Insurance Licensing page can be accessed by clicking **Insurance Licensing** from the **Regulatory Compliance** tab.



The screenshot below shows **Profile Maintenance – Insurance Licensing** page. The table that follows provides information on the important elements of this page.



The screenshot shows the 'Profile Maintenance - Basic' page. At the top, there's a navigation bar with links like 'Home', 'User Profile', 'Help/FAQ', and 'PMACS | Signout'. On the right, the Infosys logo is visible. Below the navigation, there's a breadcrumb trail: 'Home | Last Profile | Recent Profiles | Last Policy | Recent Policies | Recent Finds'. The main content area is titled 'Profile Maintenance - Basic' and says 'View the basic information for the selected profile.' It contains several tabs: 'Profile/Advisor Detail', 'Relationships', 'Regulatory Compliance', 'Commission Admin', and 'Inquiry'. The 'Regulatory Compliance' tab is currently selected and expanded, showing sections for 'Authority' (with 'Insurance Licensing' selected), 'Training' (listing 'India Post' with status 'Y'), 'External Number', and 'Product Class'. Each section has an 'Add' button and an 'Update' button.

Regulatory Compliance Tab





Profile Maintenance – Insurance Licensing



Page Elements: Profile Maintenance – Insurance Licensing Details

Serial Number	Hyperlink	Functions
1	Add New License	Users must click the Add New License hyperlink to go to the License Add Step 2 – Available Licenses page.

4.15.1 License Add Step 2 – Available Licenses



License Add Step 2 – Available Licenses page can be accessed by clicking the **Add New License** hyperlink.



The screenshot below shows **License Add Step 2 – Available Licenses** page. The table that follows provides information on the important elements of this page.



The screenshot shows a web-based application interface for managing advisor profiles. At the top, there's a navigation bar with links for Home, User Profile, and Help/FAQ. On the right side of the header, there are links for PMACS, Signout, and the Infosys logo. Below the header, a sub-navigation menu includes Advisor/ME, Policy, Inquiry, Mass Change, Output, Administration, and Job Request. Under Administration, there are links for Home, Last Profile, Recent Profiles, Last Policy, Recent Policies, and Recent Finds.

The main content area is titled "License Add Step 2 - Available Licenses". It displays a table with advisor details: Advisor Name (Alok Singh), Advisor# (AC00000107), Advisor Coordinator, Profile Type (Status), and Divisional Superintendent (Terminated). There are "Update" and "Delete" buttons at the bottom of this table.

Below this, there are tabs for Profile/Advisor Detail, Relationships, Regulatory Compliance, Commission Admin, and Inquiry. The "Inquiry" tab is currently selected. A search grid is shown with columns for Select, Line Code (L), Line Name (Life), and Authority Type (Life). It includes "Select All" and "Clear All" checkboxes. At the bottom of the grid are "Continue", "Back", and "Cancel" buttons.

License Add Step 2 – Available Licenses



Page Elements: License Add Step 2 – Available Licenses Details

Serial Number	Hyperlinks	Functions
1	Select All	Users must click the Select All hyperlink to check all rows in the selection grid.
2	Clear All	Users must click the Clear All hyperlink to uncheck all rows in the selection grid.
3	Back	Users must click the Back Button to go to the previous page.
4	Cancel	Users must click the Cancel Button to stop the add license process and go to the License Inquiry page.
5	Continue	Users must click the Continue button to initiate the edit process. If passed the user is moved to the Enter License Details page. If not, the user is returned to the current page to correct the entry.

4.15.2 License Add Step 3 – License Details



License Add Step 3 – License Details page can be accessed by clicking the **Continue** button.



The screenshot below shows **License Add Step 3 – License Details** page. The table that follows provides information on the important elements of this page.

License Add Step 3 – License Details



Page Elements: License Add Step 3 – License Details

Serial Number	Hyperlinks	Actions
1	Add/Update	Users must click this link to display the Update License Details page where the user can add the details.
2	Remove	Users must click this link to remove the selected Line combination from the grid.
3	Remove All	Displays a warning message “ Do you really want to remove all license lines for this

Serial Number	Hyperlinks	Actions
		Circle?" If the user clicks Cancel , they are returned to the page. If the user clicks OK , the Circle is removed from the add process.
4	Back	Users must click the Back Button to go to the previous page.
5	Cancel	Users must click the Cancel Button to stop the add license process and go to the License Inquiry page.
6	Submit	Users must click the Submit button to initiate the edit process. If passed the user is moved to the next page.

4.15.3 Update License Details



The screenshot below shows **Update License Details** page. The table that follows provides information on the important elements of this page.

Update License Details





Page Elements: Update License Details

Serial Number	Field Name	Notes
1	License Line	Displays the License Line.
2	License Type	Users must select the License Type from the drop-down list.
3	License #	Users must enter the License Number in the text box provided.
4	Resident Status	Users must select the resident status from the drop-down list.
5	License date (DD/MM/YYYY)	Users must select the license date from the calendar.
6	Renewal Date (DD/MM/YYYY)	Renewal date denotes the date on which the license to be renewed. However user needs not to enter the renewal date. System denotes the next renewal date as one year from the current date. After submitting, user can view the renewal date on the screen.
7	Authority Date (DD/MM/YYYY)	Users must select the authority date from the calendar.
8	Back	Users must click the Back button to go to the previous page.
9	Submit	Users must click the Submit button to initiate the edit process. If passed the user is returned to the Enter License Details page.
10	Update Renewal Date	<p>Clicking the Update Renewal Date button will cause the system to attempt to calculate the next renewal date. The following actions could result:</p> <ul style="list-style-type: none">■ If the system cannot calculate the renewal date, the system displays the following message: "Please enter the license Renewal Date."■ If the system successfully calculates a renewal date, it displays the new date in the Renewal Date field and displays the message

Serial Number	Field Name	Notes
		<p>“Renewal Date Updated.”</p> <ul style="list-style-type: none"> ■ The user should not update the renewal date. The system will automatically calculate it and update in the renewal date section.

4.15.4 License Add Step 3 – License Details



License Add Step 3 – License Details page will show the summary of the details entered in previous page. It is a final confirmation screen. User needs to press the **Submit** button if details entered are found to be ok.



The screenshot below shows **License Add Step 3 – License Details** page. The table that follows provides information on the important elements of this page.

The screenshot displays the "License Add Step 3 - License Details" page. At the top, there's a navigation bar with links for Home, User Profile, Help/FAQ, PMACS, and Infosys. Below the navigation is a sub-navigation menu with links for Advisor/ME, Policy, Inquiry, Mass Change, Output, Administration, and Job Request. Under the main title, there's a sub-header "License Add Step 3 - License Details" followed by a sub-instruction "Enter the details associated with each license you would like to add." A table follows, showing advisor details: Advisor Name (Alok Singh), Advisor# (AC00000107), Advisor Coordinator, Profile Type (Divisional Superintendent), and Status (Terminated). Below the table are tabs for "Profile/Advisor Detail", "Relationships", "Regulatory Compliance", "Commission Admin", and "Inquiry". A second table lists license details: Line (Life), Type (Agent), License # (1226), Resident, License Date (17/12/2013), Renewal Date (17/12/2014), Authority Date (20/12/2013), and buttons for "Update" and "Remove All". At the bottom are "Submit", "Back", and "Cancel" buttons.

License Add Step 3 – License Details



Page Elements: License Add Step 3 – License Details

Serial Number	Buttons	Functions
1	Back	Users must click the Back button to go to the previous page.
2	Cancel	Users must click the Cancel button to stop the add License process and returns the user to the Profile Maintenance – Insurance Licensing page.
3	Submit	Users must click the Submit button to add the license to Advisor's profile.

4.15.5 Profile Maintenance – License Detail



Profile Maintenance – License Detail page can be accessed by clicking **Insurance Licensing** from the **Regulatory Compliance** tab. On the **Insurance Licensing** page, the user will be required to click on the **Detail** button as will be seen in the **Action** column.



The screenshot below shows **Profile Maintenance – License Detail** page. The table that follows provides information on the important elements of this page.

The screenshot displays the 'Profile Maintenance - License Detail' page. At the top, there are navigation links for Home, User Profile, and Help/FAQ. The main header is 'Profile Maintenance - License Detail'. Below it, a sub-header says 'View details for the selected license below.' A table summarizes advisor and license details:

Advisor Name	Alok Singh	Advisor Coordinator	Profile Type	Divisional Superintendent
Advisor#	AC00000107		Status	Terminated

Below the table, there are tabs for 'Profile/Advisor Detail', 'Relationships', 'Regulatory Compliance', 'Commission Admin', and 'Inquiry'. The 'Regulatory Compliance' tab is active. It contains a table for 'License Detail' with columns for License Line, License Type, Resident Status, License #, Status, Status Reason, External ID, Follow Up Date, Authority Date, Status Date, License Date, Renewal Date, Termination Date, and User Responsible. A note at the bottom says 'Change License Status to: Expired' with a dropdown menu and an 'Update' button.

Profile Maintenance – License detail



Page Elements: Profile Maintenance – License detail

Serial Number	Hyperlinks	Functions
1	Return to License Enquiry	<p>Users must click the hyperlink to go to the License Inquiry page.</p> <p>The Update (Hyperlink) process has two modes:</p> <ul style="list-style-type: none"> ■ If the user clicks the Update hyperlink and the Change License Status to drop-down is blank or null, the normal update process is initiated. ■ If the user selects a new status with the Change Status to drop-down and clicks the Update hyperlink, the status update process is initiated.

4.15.6 License Update Entry



License Update Entry page will allow the authorized user to change the details for the license of an advisor.



The screenshot below shows **License Update Entry** page. The table that follows provides information on the important elements of this page.

The screenshot displays the 'License Update Entry' page of the Postal Life Insurance system. At the top, there's a navigation bar with links like Home, User Profile, Help/FAQ, and PMACS Signout. The main content area has tabs for Advisor/ME, Policy, Inquiry, Mass Change, Output, Administration, and Job Request. Below these tabs, there are links for Home, Last Profile, Recent Profiles, Last Policy, Recent Policies, and Recent Finds. The central part of the screen is titled 'License Update Entry' and contains a sub-instruction 'Update the detailed License information below.' There are several input fields and dropdown menus for updating advisor details. A table at the bottom summarizes the 'Update License Details' for an advisor named Alok Singh (Advisor# AC00000107). The table includes columns for Advisor Name, Advisor Coordinator, Profile Type, Divisional Superintendent, Status, and Status Reason. The 'Status' field is set to 'Terminated'. The 'Status Reason' dropdown menu is open. Other fields include License Line (Life), License Type (Agent), Resident Status (Resident), License # (5555), Authority Date (20/12/2013), Status Date (20/12/2013), License Date (17/12/2013), Renewal Date (17/12/2014), Termination Date (blank), and User Responsible (sadhakar.gummadi). Buttons for 'Submit' and 'Cancel' are at the bottom right of the form.





License Update Entry

Page Elements: License Update Entry Detail

Serial Number	Buttons	Functions
1	Submit	Users must click the Submit button to initiate the edit process. If the edit process is not successful, the user is returned to the current page to correct the entry. If edits are passed then the user is taken to the Profile Maintenance – License Detail page.
2	Cancel	Users must click the Cancel button to go to the License Detail page.

4.16 License Renewal Follow-up



The system follows the License status and generate follow-up task by setting up rules in the system. This rule is for the license follow-up before the license renewal date.

Different reminders for follow-up are described below.

Reminder No: 1

- First notice will be generated for the license renewal 1 month before the License expiry date.

Reminder No: 2

- Second notice will be generated for the license renewal 15 days before the License expiry date, if not renewed already.

Reminder No: 3

- Third notice will be generated for the license renewal 7 days before the License expiry date, if not renewed already.

Reminder No: 4

- Final notice will be generated for the license renewal on the License expiry date, if not renewed already.

4.17 Expiry of a License or License Follow-up

Currently the license is issued to advisors of type **Direct Agents**. License to a Direct Agent is issued in 2 steps:

When an advisor (Direct Agent) is recruited, he/she is required to undergo a mandatory training in the first year. He/she will be allocated with a Provisional License Number at the time of recruitment. In case, the Advisor is unable to clear the Licentiate examination, the license will be **Suspended**.



If the Direct Agent clears the Licentiate examination in the first year and the mandatory training is completed, the License number becomes permanent. Otherwise the status will be **Suspended**. Alerts in form of SMS, e-mail, letter, etc. will be sent to the advisor.

License renewal can be set in 2 ways:

New License Renewal

- First renewal happens after a defined period just after the new license is issued to an a. Hence, in this case the renewal rule for license will be 1 year. (This will be used for renewal of provisional license.)

Susequent Renewals

- In this case, the renewal rule for license will be set as 3 years (as per IRDA rule) from the date of issuance of Permanent License Number.

4.18 Deactivation of an Advisor Code



License can be cancelled manually through the License Update Entry page. Advisor Number will be deactivated and the profile will be moved to Suspended status soon after the License renewal date is elapsed. The License renewal date will be based on the License renewal rule set during the data setup activity.

Section 5: Termination of Advisors

5.1 Advisor Termination



PMACS® application helps user to terminate an advisor(s) profile at any point in time based on the authority level. Authority level is defined in the system to some users. The user will have to mention the reason of termination for that particular advisor.



Advisor profile can be terminated from the **Profile Maintenance-Basic** screen. For terminating a profile, user needs to select the status as **Terminated** and then click on **Update**.



The screenshot below shows **Advisor Termination** option.

The screenshot displays the 'Profile Maintenance - Basic' screen of the PMACS application. At the top, there are navigation links for Home, User Profile, Help/FAQ, and Infosys. The main content area is titled 'Profile Maintenance - Basic' and shows basic information for an advisor named Alok Singh. Below this, there are tabs for 'Profile/Advisor Detail', 'Relationships', 'Regulatory Compliance', 'Commission Admin', and 'Inquiry'. Under 'Profile/Advisor Detail', the advisor's name is listed as Mr. Alok Singh, and the status is set to 'Terminated'. The 'Status' dropdown menu also includes options like 'Active', 'Pending', and 'Suspended'. Other sections visible include 'Distribution Channel', 'External Number', 'Product Class', and 'Personal Information'. The 'Status Information' section shows the advisor was terminated on 19/12/2013 due to voluntary license surrender.

Advisor Termination





Once the user clicks on the **Update** hyperlink, with the Change status dropdown selected as **Terminated**, the user will be navigated to **Status Information Update** page.



Directorate, CPMG, DPS, DSP/ASP (HQ) will have the authority to terminate the advisors. However, DSP/ ASP (HQ) will have the authority only to terminate advisors which fall in hierarchy level below their respective hierarchy levels.



The screenshot below shows **Status Information Update** page. The table that follows provides information on the important elements of this page.

The screenshot displays the 'Status Information Update' page. At the top, there's a header bar with the India Post logo, navigation links like Home, User Profile, Help/FAQ, and a signout link. Below the header is a menu bar with Advisor/ME, Policy, Inquiry, Mass Change, Output, Administration, and Job Request. Underneath the menu is a sub-navigation bar with Home, Last Profile, Recent Profiles, Last Policy, Recent Policies, and Recent Finds. The main content area is titled 'Status Information Update' and contains a sub-instruction 'Update the status information below.' It shows a table with advisor details: Advisor Name (Alok Singh), Advisor# (AC00000107), Advisor Coordinator, Profile Type (Divisional Superintendent), and Status (Terminated). Below this is a grid with tabs for Profile/Advisor Detail, Relationships, Regulatory Compliance, Commission Admin, and Inquiry. A modal window titled 'Add/Update Status Information' is open, containing fields for Status (Active), Status Reason (dropdown menu), Status Date (20/12/2013), Effective Date (19/12/2013), and Termination Date. At the bottom of the modal are 'Submit' and 'Cancel' buttons.

Status Information Update



Page Elements: Status Information Update Details

Serial Number	Field Name	Notes
1	Status	Status is displayed as selected on the previous screen. In this case, it would be terminated.

Serial Number	Field Name	Notes
2	Status Reason	Users must select the Status Reason from the drop-down list.
3	Status Date	For Status as Terminated: Date defaulted to current date.
4	*Effective Date (DD/MM/YYYY)	For Status as Terminated: Date defaulted to the profile creation date and is non-editable.
5	*Termination Date (DD/MM/YYYY)	Users must select the termination date from the calendar pop-up. Termination Date shows the profiles terminated on a specific date. It is mandatory to mention the Termination Date while deactivating the Advisor Profile.

5.2 Termination Date



Termination date has to be manually keyed in the system. This date will be from which the termination of the profile will come into effect.

5.3 AC Profile Termination



If an **AC profile** is to be terminated, then the AC profile should not have any active advisor under him. Otherwise, a validation will be triggered by the system which will say '**Active agents exist for this Agent Coordinator. You cannot terminate a Agent Coordinator profile if active agents exist.**'



The screenshot below shows **Profile Update Message**.



The screenshot shows a web-based application interface for managing advisor profiles. At the top, there's a navigation bar with links for Home, User Profile, and Help/FAQ. On the right side of the header, there are links for PMACS, Signout, and Infosys. The main content area has a title 'Profile Update Message' and a sub-instruction 'Review the messages below.' Below this, there's a table with two rows of data:

Advisor Name	ABCD ASWE	Advisor Coordinator	Profile Type	Divisional Superintendent
Advisor#	MA00240242		Status	Active

Below the table, there are several tabs: Profile/Advisor Detail, Relationships, Regulatory Compliance, Commission Admin, and Inquiry. A status message box says 'Active agents exist for this Agent Coordinator. You cannot terminate a Agent Coordinator profile if active agents exist.' with an 'OK' button.

Profile Update Message



For the new functionality for India Post PLI, Advisor Coordinator will be replaced by a Divisional Office and all the advisors will be tagged to their respective Divisional Offices. For an advisor profile to be terminated, there will no change apart from the reasons of termination.

5.4 Workflow

Workflow

Task	User	Approver	Location
Scan documents	Scanning Assistant	Scanning Assistant	Divisional office
Verify the new profile created	Data Entry Operator	DSP/ASP (HQ)	Divisional office
Add mandatory training details to Direct Agent's profile	Data Entry Operator	DSP/ASP (HQ)	Divisional office
Add Provisional License details to Direct	Data Entry Operator	DSP/ASP (HQ)	Divisional office



Task	User	Approver	Location
Agent's profile			
License Follow-up batch	System Administrator 1	System Administrator 2	Circle Office



Glossary

Term	Definition
Authority	The Line of business which an advisor can sell like, RPLI, PLI, ULIPs, etc.
Contracts	Contracts (selling agreement) define the selling arrangement between PLI/RPLI and an advisor.
Distribution Channels	A way of sorting profiles into predefined groupings, such as sales divisions like bank, alternate channels.
Hierarchy	Commission hierarchy in the PMACS® application enables to specify the profiles of the commission process when a specific profile is involved as a servicing or writing agent for a policy event.
Licensing	Licensing is obtaining permission from the Insurer to sell policies. Insurance Regulatory body. IRDA has set some guidelines and requirements for obtaining an insurance license before an advisor begins selling or writing insurance policies.
Line of business	A line of business such as Life, health, etc.