

USER GUIDE FOR PREMIUM COLLECTION BY EMPOWERED AGENTS

Ver. 2.1.3

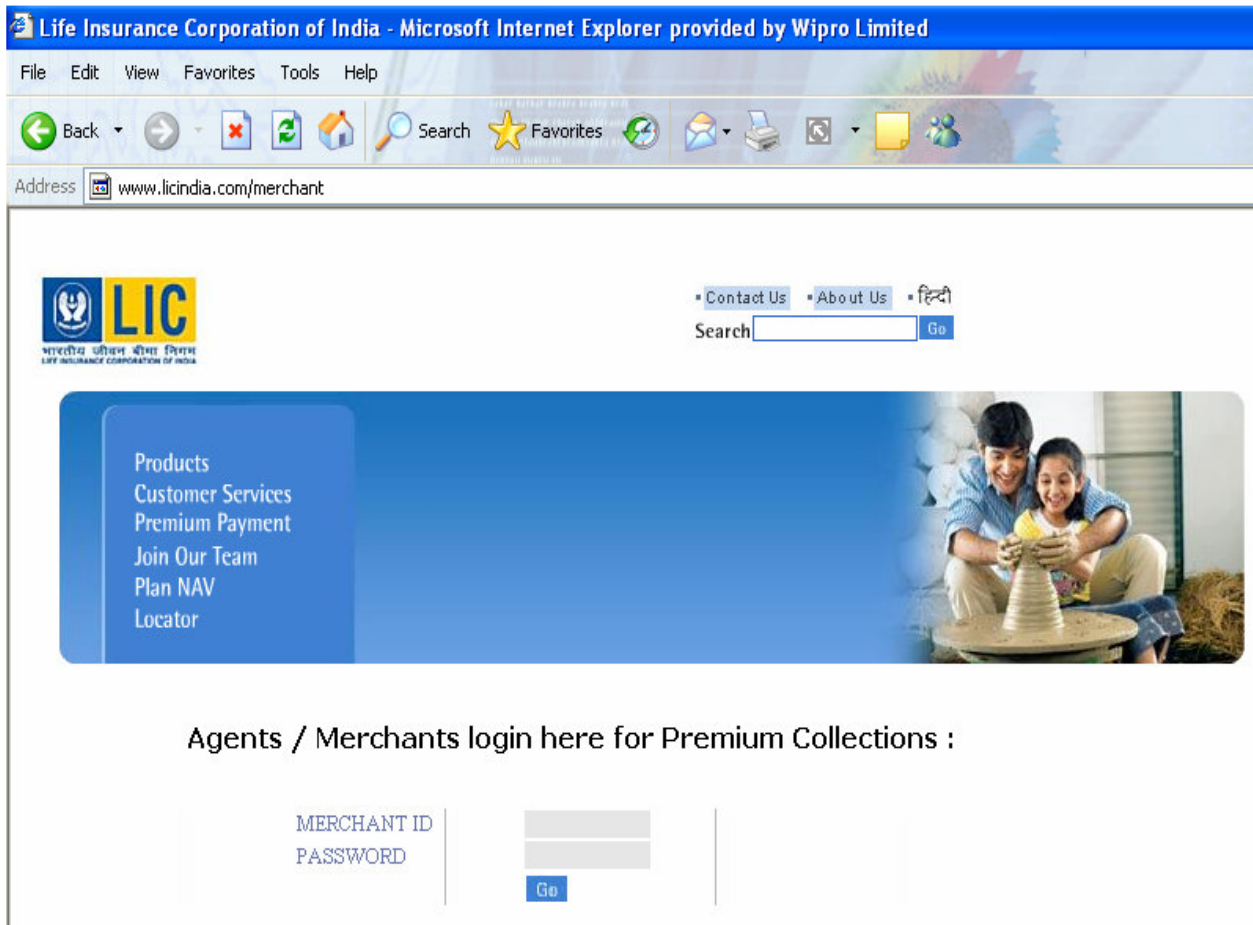
03rd August 2009

**Prepared by
Central Office, Information Technology Department,
Mumbai**

GUIDELINES FOR AGENTS AND BRANCH FOR PREMIUM COLLECTION BY AGENTS (CHEQUE AND CASH).

1. To enter the web-site for premium collection by Agents , the user has to key-in <http://www.licindia.in/merchant/>

This will lead to the screen shown below.

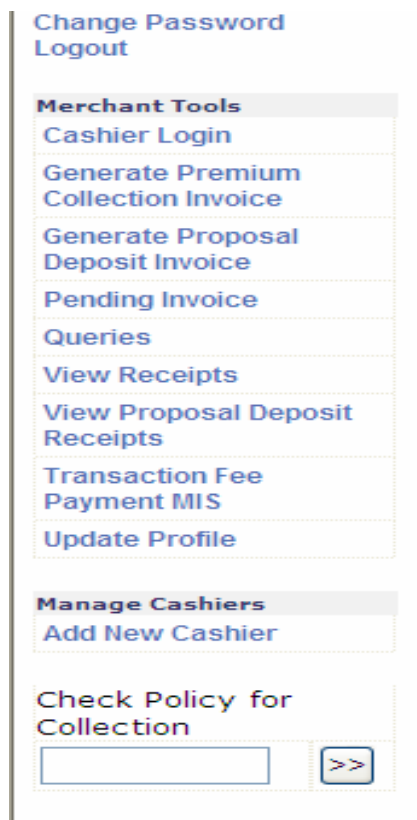


2. The Empowered Agents can login using their Merchant-ID and the password emailed by Central Office IT Department.

MERCHANT ID	<input type="text"/>
PASSWORD	<input type="password"/>
	<input type="button" value="Go"/>

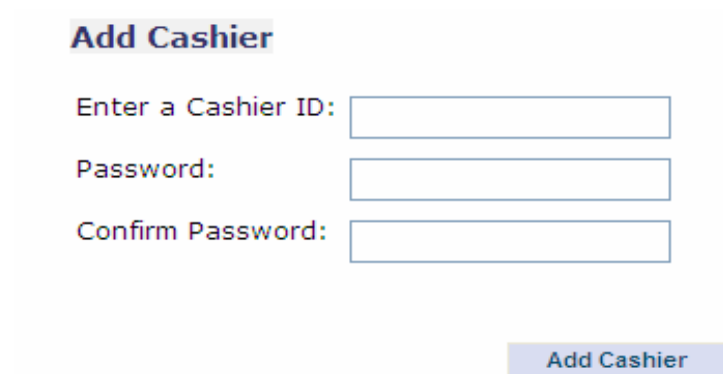
Very important: - This application is doing actual financial transactions. It is must that secrecy of the password is to be maintained by the Empowered Agent.

After successful login, the Empowered Agents will be having the following options available on the screen:-



The screenshot shows a vertical menu of options. At the top are 'Change Password' and 'Logout'. Below is a section titled 'Merchant Tools' containing: 'Cashier Login', 'Generate Premium Collection Invoice', 'Generate Proposal Deposit Invoice', 'Pending Invoice', 'Queries', 'View Receipts', 'View Proposal Deposit Receipts', 'Transaction Fee Payment MIS', and 'Update Profile'. Below that is a section titled 'Manage Cashiers' with 'Add New Cashier'. At the bottom is a section titled 'Check Policy for Collection' with an input field and a '>>' button.

When the empowered agent logs in for the first time, he has to create / add new Cashier through the option “Add New Cashier” (available under Tools: - Manage Cashiers) giving them the Cashier-ID:-



The 'Add Cashier' form has three input fields: 'Enter a Cashier ID:', 'Password:', and 'Confirm Password:'. Below the fields is an 'Add Cashier' button.

Note: You are allowed to add maximum 5 Cashiers.

3. The premium collections are to be done by the cashiers using the option “Cashier Login” under “Merchant Tools”. For this the Agent has to enter his login and password , as shown below:

E.g. Of the cashier will key-in his user-id and password.

Welcome, RAJESH
GUPTA
Change Password

Logout

Merchant Tools

- Cashier Login
- Generate Premium Collection Invoice
- Generate Proposal Deposit Invoice
- Pending Invoice
- Queries
- View Receipts

Cashier Login

Cashier ID:

Password:

Submit

4. The successful login by a cashier will lead to the screen below where cashier is having the following options (under Cashier Tools):-

- a. Premium Collection
- b. ULIP Premium Collection
- c. Generate Premium Collection Invoice
- d. Proposal Deposit Collection
- e. Generate Proposal Deposit Invoice
- f. View Proposal Deposit Receipts

Welcome, cs001
Change Cashier Password

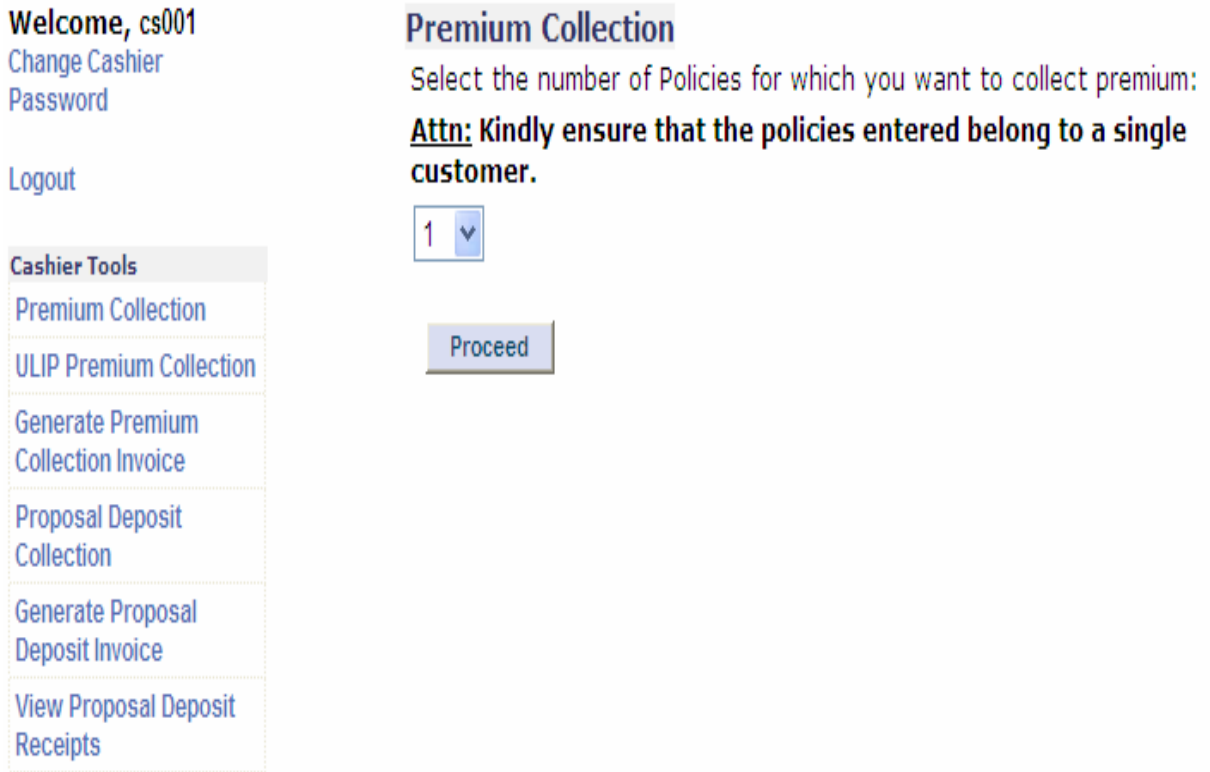
Logout

Cashier Tools

- Premium Collection
- ULIP Premium Collection
- Generate Premium Collection Invoice
- Proposal Deposit Collection
- Generate Proposal Deposit Invoice
- View Proposal Deposit Receipts

Welcome Cashier cs001

- Premium Collection:** - Selecting the Premium Collection option by a Cashier will show the following screen. Here the Cashier will be prompted to select the Number of policies for which he wants to collect the premium (i.e. policies of the same policy-holder) from a drop-down box. A Cashier can collect, at a time, premium for 20 policies ONLY.



Welcome, cs001
Change Cashier
Password
Logout

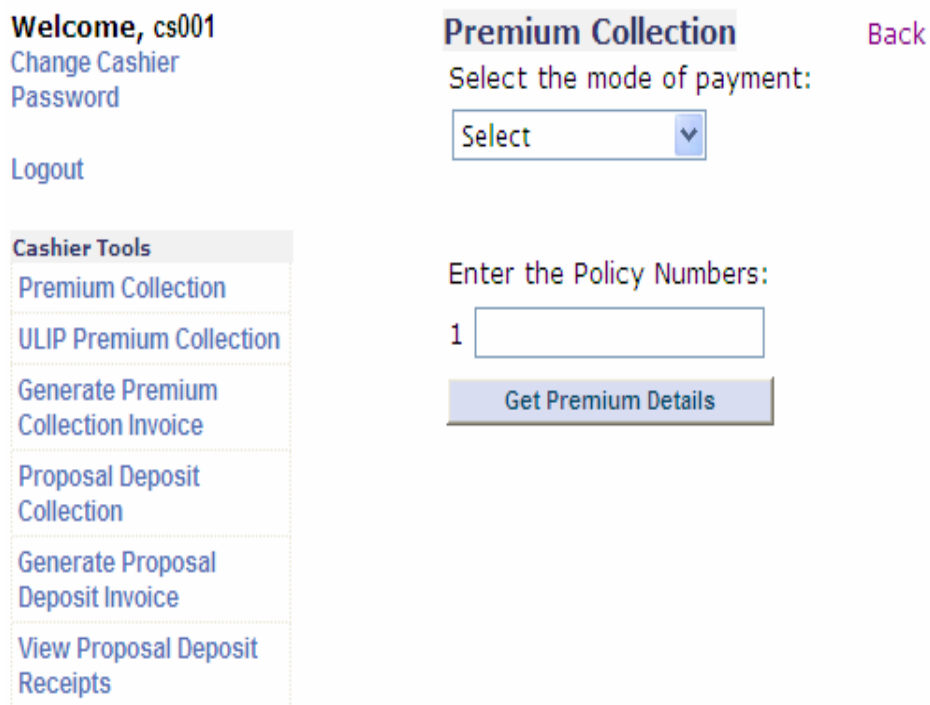
Cashier Tools
Premium Collection
ULIP Premium Collection
Generate Premium Collection Invoice
Proposal Deposit Collection
Generate Proposal Deposit Invoice
View Proposal Deposit Receipts

Premium Collection
Select the number of Policies for which you want to collect premium:
Attn: Kindly ensure that the policies entered belong to a single customer.

1 ▼

Proceed

- On selecting the number of policies for which premium is to be collected and clicking the “Proceed” button (displayed above), the Cashier will get the following page on the screen.



Welcome, cs001
Change Cashier
Password
Logout

Cashier Tools
Premium Collection
ULIP Premium Collection
Generate Premium Collection Invoice
Proposal Deposit Collection
Generate Proposal Deposit Invoice
View Proposal Deposit Receipts

Premium Collection [Back](#)
Select the mode of payment:
Select ▼

Enter the Policy Numbers:
1

Get Premium Details

7. The cashier has been provided 2 options as “mode of payment”, namely
- a. Cash only
 - b. Cheque and Cash

Accordingly, the cashier has to select the appropriate option from the drop-box (as shown in the picture below).

Select the mode of payment:

The screenshot shows the 'Premium Collection' interface. On the left is a sidebar with 'Welcome, cs001' and various tools. The main area has a 'Premium Collection' header and a 'Back' link. Below the header, it says 'Select the mode of payment:' followed by a dropdown menu. The dropdown is open, showing 'Select' at the top, 'Cash only', and 'Cheque and Cash'. Below the dropdown is a text input field labeled 'Enter the Policy Numbers:' with the number '1' and a 'Get Premium Details' button.

For e.g. If the premium (alongwith late fee, if any) is paid partly by cheque and partly by cash then the Cashier has to select the “Cheque and Cash” option. Depending on the choice of the Cashier he is forwarded to the screens for collecting “Cash only” or “Cheque & Cash”. After selecting the appropriate option and keying the policy number/s (and cheque details in case of cheque payment) the Cashier has to click on “Get Premium Details” button to get the details.

This screenshot shows the 'Premium Collection' screen after the 'Cheque and Cash' option has been selected. The dropdown menu now displays 'Cheque and Cash'. The 'Enter the Policy Numbers:' field contains '1' followed by '830338590'. Below this, there are fields for 'Cheque No:' (123456), 'Cheque Date (dd/mm/yyyy):' (06/05/2009), and 'Cheque MICR No:' (123456789). A 'Get Premium Details' button is visible at the bottom.

The cheque MICR No. is a mandatory field. If the MICR no. is not available the cashier has to enter zeros. If the total premium amount is paid ONLY by cheque then “Zero” amount has to be entered in Cash amount column.

VERY IMPORTANT: In case of cheque collections, the Invoice can be deposited ONLY at LIC Branch Office i.e. Invoices for collections made by cheque cannot be deposited at Axis Bank. Agents are therefore requested to select LIC Branch only at the time of Invoice Generation involving even a single cheque.

Also note that if the total cash amount in a single invoice is greater than Rs.50000/- kindly select LIC B.O. ONLY for depositing the collected amount. Please don't select AXIS bank for cash transactions (in a single invoice) greater than Rs.50000/- .

8. On clicking the “Get Premium Details” button the screen will display the details of policy/ies where premium is / are due. Also it will allow the Cashier to select and change the number of installments under the displayed policy/policies for which he wants to collect the premium.

The screenshot shows a web application interface for LIC. On the left is a navigation menu with options like 'Welcome, cs001', 'Change Cashier Password', 'Logout', and 'Cashier Tools' (including Premium Collection, ULIP Premium Collection, Generate Premium Collection Invoice, Proposal Deposit Collection, Generate Proposal Deposit Invoice, and View Proposal Deposit Receipts). The main content area is titled 'Policies due for Payment:' and includes a 'Back to Policy Input Page' link. Below this is a table with the following data:

Sr No	Policy No	Policy Holder	FUP	Prm Amt	Inst
1	830338590	Sri Ashokkumar Shantilal Patel,	26/05/2009	5469.70	<input type="button" value="v"/>

Below the table, the text reads 'Kindly select the number of dues for payment' followed by a 'Submit' button and a link: 'Click here for another Premium Collection Transaction'.

On selecting the number of installments under all the displayed policies the Cashier has to click on “Submit” button.

9. The following screens are shown for the collection for “Cheque & Cash” wherein after keying in the policy number/s Cashier is shown the particulars of the entered policy Number/s and is prompted to enter various details like Cash-Cheque details, particulars of Bank Branch (whether it is a Home Branch etc. to be informed by the LIC Branch Office) :-

Welcome, cs001

Change Cashier
Password

Logout

Cashier Tools

- Premium Collection
- ULIP Premium Collection
- Generate Premium Collection Invoice
- Proposal Deposit Collection
- Generate Proposal Deposit Invoice
- View Proposal Deposit Receipts

Check Policy for Collection

 >>

Policies due for Payment:

[Back to Policy Input Page](#)

Sr No	Policy No	Policy Holder	FUP	Prm Amt	Inst	Late Fee	Tot Amt
1	830338590	Sri Ashokkumar Shantilal Patel,	26/05/2009	5469.70	1	0.0	5,469.70

Cheque No:

Cheque Date:

Bank Type:

 Bank Name:

 Bank Branch:

Total Amount to be collected 5469.70

Enter cheque amount

Enter cash amount

Please click on Validate Amount button to enable Confirm Payment

Bank Type: Branch Office generally has four codes for the Bank Type. Branch would guide Agents in providing valid values for this field.

Welcome, cs001

Change Cashier
Password

Logout

Cashier Tools

- Premium Collection
- ULIP Premium Collection
- Generate Premium Collection Invoice
- Proposal Deposit Collection
- Generate Proposal Deposit Invoice
- View Proposal Deposit Receipts

Check Policy for Collection

 >>

Policies due for Payment:

[Back to Policy Input Page](#)

Sr No	Policy No	Policy Holder	FUP	Prm Amt	Inst	Late Fee	Tot Amt
1	830338590	Sri Ashokkumar Shantilal Patel,	26/05/2009	5469.70	1	0.0	5,469.70

Cheque No:

Cheque Date:

Bank Type:

Bank Name:

Bank Branch:

Total Amount to be collected 5469.70

Enter cheque amount

Enter cash amount

Please click on Validate Amount button to enable Confirm Payment

10. After keying in all the details related to payment mode (Cash / Cheque) and Bank details the Cashier has to click on the “**Validate Amount**” button (displayed above) for validation of the amount entered. In respect of cheque payment, short remittance upto Re. 1/- is allowed.

Welcome, cs001
Change Cashier
Password

Logout

Cashier Tools
Premium Collection
ULIP Premium Collection
Generate Premium Collection Invoice
Proposal Deposit Collection
Generate Proposal Deposit Invoice
View Proposal Deposit Receipts

Check Policy for Collection
 >>

Policies due for Payment: [Back to Policy Input Page](#)

Sr No	Policy No	Policy Holder	FUP	Prm Amt	Inst	Late Fee	Tot Amt
1	830338590	Sri Ashokkumar Shantilal Patel.	26/05/2009	5469.70	1	0.0	5,469.70

Cheque No:

Cheque Date:

Bank Type:

Bank Name:

Bank Branch:

Total Amount to be collected: 5469.70

Enter cheque amount:

Enter cash amount:

Please click on Validate Amount button to enable Confirm Payment

After successful validation, the Cashier is prompted to confirm payment by clicking on “**Confirm Payment**” button.

11. On confirmation the following screen will be displayed, showing the details of the transaction.

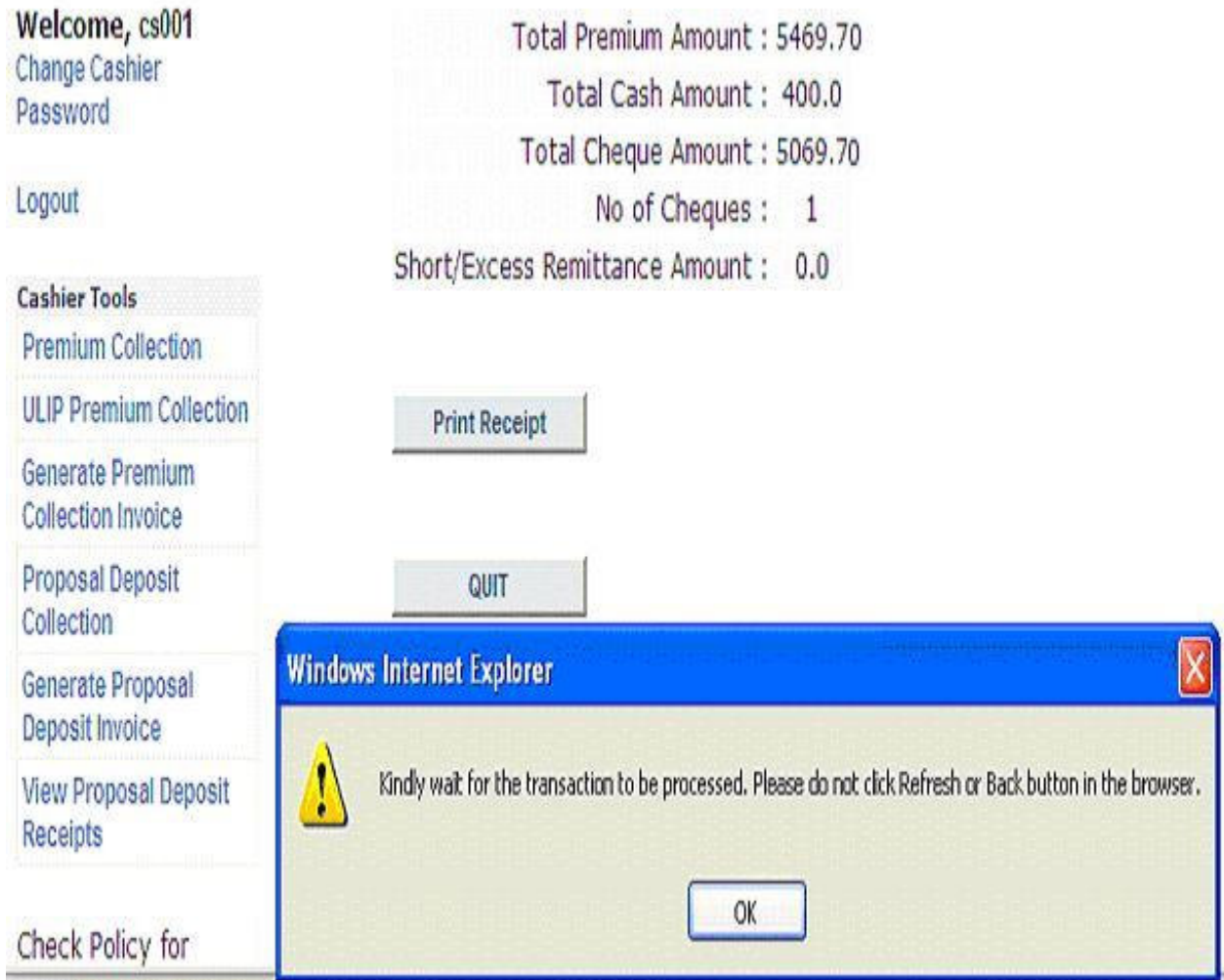
Welcome, cs001
Change Cashier
Password

Logout

Cashier Tools
Premium Collection
ULIP Premium Collection
Generate Premium Collection Invoice
Proposal Deposit Collection
Generate Proposal Deposit Invoice
View Proposal Deposit Receipts

Total Premium Amount : 5469.70
Total Cash Amount : 400.0
Total Cheque Amount : 5069.70
No of Cheques : 1
Short/Excess Remittance Amount : 0.0

If the details displayed are correct the Cashier has to click on “Print Receipt” button shown above. Once the “Print Receipt” button is clicked the transaction is successful and cannot be reverted back under any circumstances. Hence it is advised to exercise due diligence before clicking on “Print Receipt” button. After clicking the “Print Receipt” button the screen will display the following screen and will prompt the Cashier to click on “OK” button (displayed below the message “Kindly wait for the transaction to be processed. Please do not click on Refresh or Back button in the browser”).



12. On clicking the “OK” button, a premium receipt is generated in a separate window. Cashier has to print this receipt on his / her local laser printer.



Collecting Center : A001

Transaction No. : 136266

Date (Time) : 14/05/2009 (17:07:00)

Branch Code : CBK1
PCMC, Network Operating Center
1st Floor, Jeevan Seva Annexe,
S.V.Road, Santacruz(W)
Mumbai - 400 054
Ph. : +91-022-1251
e-mail : bo_cbk1@licindia.com

RENEWAL PREMIUM RECEIPT

Received with thanks Rs. 5,469.70 from policyholder Shri/Smt.
towards the following policy/ies

Policy No Name Agency Code	Plan Term D.O.C.	Inst. Prem(Rs) Mode Sum Assured	No Of Inst Due Fr Due To	Total Premium Late Fee Total Amt	Branch Next Due
830338590 00006839	93 25 26/05/1990	5,469.70 YLY 1,00,000.00	1 05/09 05/09	5,469.70 0.00 5,469.70	TEST 05/10
Page Total (Rs)		5,469.70		5,469.70 0.00 5,469.70	
Grand Total (Rs)		5,469.70		5,469.70 0.00 5,469.70	

RUPEES FIVE THOUSAND FOUR HUNDRED SIXTY-NINE AND SEVENTY PAISE ONLY

Paid by Cash :400.00

Paid by Cheque :5,069.70

Cheque No :123456

Cheque Date :06/05/2009

0

Consolidated Stamp Duty Paid
Mudrank 0915/592/CR 76/M 1 Dated 19/03/2009

For Life Insurance Corporation of India,
RAJESH GUPTA(02951148)

This receipt is subject to realisation of cheque amount.

Zindagi Ke Saath Bhi, Zindagi Ke Baad Bhi

Page 1 of 1

No Revenue Stamp is required to be affixed, since Consolidated Stamp duty is paid by CRM, Central Office and appropriate Mudrank No. is printed on the receipt.

13. ULIP Renewal Premium Collection: - Selecting the ULIP Premium Collection option by a Cashier will show the following screen. Here the Cashier will be prompted to select the mode of payment.

Welcome, cs001
Change Cashier
Password
Logout

ULIP Premium Collection
Select the mode of payment:
 Cash Only
 Cheque Only

14. According to the mode of payment selected further details has to be keyed in like cheque number / date /MICR code. The cashier will also be asked to key in the policy number for which he wants to collect the premium. For ULIP collection a Cashier can collect, at a time, premium for ONLY one policy. He will also be required to select whether the amount collected is for renewal premium or additional premium (TOP-UP).

Welcome, cs001
Change Cashier
Password
Logout

ULIP Premium Collection
Select the mode of payment:
 Cash Only
 Cheque Only

Cheque No: Cheque Date (dd/mm/yyyy): Cheque MICR No:

Enter Policy Number:

Renewal Premium Additional Premium(Top Up)

Cashier Tools
Premium Collection
ULIP Premium Collection
Generate Premium Collection Invoice
Proposal Deposit Collection
Generate Proposal Deposit Invoice
View Proposal Deposit Receipts

15. On completing all the details on the screen and selecting the appropriate option, the Cashier has to click on “Get Premium Details” button. On clicking the “Get Premium Details” button, the next screen will display details of the customer, policy details, units under the policy, fund type, etc if the policy is due for payment / satisfies TOP-UP conditions. Cashier should confirm the details before proceeding further. This will help in avoiding wrong collections.

Policies For Premium Payment

Customer Name: Anil Krishna Chavre,					
Policy No	Plan	FUP	Prm Amt	Inst	Tot Amt
893478190	180	14/05/2009	2,500.00	1	2500.0
No.of Units	Fund Type	Last Accounting Date		Last Charge Recovery Date	
1419.031	Growth	09/02/2009		14/03/2009	
Cheque No		Cheque Date		Micr No	
123457		07/05/2009		123456788	

The Cashier after confirming the details has to key in various details like Cash amount or Cheque details, particulars of Bank Branch and click on “Proceed” button (displayed below).

Welcome, cs001

Change Cashier

Password

Logout

Cashier Tools

Premium Collection

ULIP Premium Collection

Generate Premium Collection Invoice

Proposal Deposit Collection

Generate Proposal Deposit Invoice

View Proposal Deposit Receipts

Check Policy for Collection



Policies For Premium Payment

Customer Name: Anil Krishna Chavre,					
Policy No	Plan	FUP	Prm Amt	Inst	Tot Amt
893478190	180	14/05/2009	2,500.00	1	2500.0
No.of Units	Fund Type	Last Accounting Date		Last Charge Recovery Date	
1419.031	Growth	09/02/2009		14/03/2009	
Cheque No		Cheque Date		Micr No	
123457		07/05/2009		123456788	
Bank Name			Bank Branch		
Corporation Bank			Nariman Point Branch		
Cheque Amount			2500		
Please verify the displayed details and proceed.					
<input type="button" value="Proceed"/>					

IT IS IMPORTANT to note here that the transaction of ULIP will either be in Cash or in Cheque ONLY. The collection of ULIP premium (renewal or TOP-UP) should NOT be accepted part in Cash and part in Cheque. Similarly the Merchant / Cashier should ensure that the cheque collected for ULIP is a **LOCAL CHEQUE ONLY**. Under no circumstances the cheque collected should be an OUTSTATION cheque.

16. On clicking the “Proceed” button the screen will display a screen where the Cashier will be prompted to click on “ OK” button (displayed below the message “Kindly wait for the transaction to be processed. Please do not click on Refresh or Back button in the browser”). Once the “OK” button is clicked the transaction is successful and cannot be reverted back under any circumstances. Hence it is advised to exercise due diligence before clicking on “OK” button.

After clicking “OK” button the following screen will be displayed giving details of the successful transaction. A link “[Click here to Print / View your Premium payment receipt](#)” (as displayed below) will also be provided just below the details of successful transaction, to view and print the premium receipt.

Welcome, cs001
Change Cashier
Password
Logout

Your Transaction was successful

Transaction No	MER00136267
Transaction Date	14/05/2009

- Cashier Tools
- Premium Collection
- ULIP Premium Collection
- Generate Premium Collection Invoice
- Proposal Deposit Collection
- Generate Proposal Deposit Invoice
- View Proposal Deposit Receipts

[Click here to Print/View your Premium payment receipt.](#)

Your available Limit is **Rs. 28,493.00**

[Click here for another ULIP Premium Collection](#)

17. On clicking the link button, a premium receipt is generated in a separate window. Cashier has to print this receipt on his / her local laser printer.



Collecting Center : A001

Transaction No. : 136267

Date (Time) : 14/05/2009 (17:59:25)

Branch Code : CBK1
PCMC, Network Operating Center
1st Floor, Jeevan Seva Annexe,
S.V.Road, Santacruz(W)
Mumbai - 400 054
Ph. : +91-022-1251
e-mail : bo_cbk1@licindia.com

RENEWAL PREMIUM RECEIPT

Received with thanks Rs. 2,500.00 from policyholder Shri/Smt.Anil Krishna Chavre,
towards the following policy/ies

Policy No Name Agency Code	Plan Term D.O.C.	Inst. Prem(Rs) Mode Sum Assured	No Of Inst Due Fr Due To	Total Premium Late Fee Total Amt	Branch Next Due
893478190 Chavre, A.K. 01724887	180 20 14/08/2007	2,500.00 QLY 1,00,000.00	1 05/09 05/09	2,500.00 0.00 2,500.00	887 08/09
Page Total (Rs)		2,500.00		2,500.00 0.00 2,500.00	
Grand Total (Rs)		2,500.00		2,500.00 0.00 2,500.00	

FUND TYPE: Growth

Units allocated will be intimated separately in this policy.

RUPEES TWO THOUSAND FIVE HUNDRED ONLY

Paid by Cash :0.00

Paid by Cheque :2,500.00

Cheque No :123457

Cheque Date :07/05/2009

Anil Krishna Chavre,
House-5484,Shreekrishna Ngr,
Opp.Nalini Krishna Store,
Ambemath East,Dt.Thana
421501

Consolidated Stamp Duty Paid

For Life Insurance Corporation of India,
RAJESH GUPTA(02951148)

This receipt is subject to realisation of cheque amount.

Zindagi Ke Saath Bhi, Zindagi Ke Baad Bhi

18. ULIP additional Premium Collection (TOP-UP): - If the Cashier has to collect amount for additional premium (TOP-UP), the Cashier will have to select the appropriate mode of payment (Cash or Cheque) as already described above under point no. 13, the radio button for “Additional Premium” (as shown below) and enter the policy number. On keying in the details the Cashier has to click on “Get Premium Details” button.

19. On clicking the “Get Premium Details” button the next screen will display details of the customer, policy details, units under the policy, fund type, etc; if the policy is satisfies TOP-UP conditions. Cashier should confirm the details before proceeding further. This will help in avoiding wrong collections.

Customer Name: Tushar Suresh Naik				
Policy No	Plan	FUP	Prm Amt	
893681462	181	10/06/2009	2,500.00	
No.of Units	Fund Type	Last Accounting Date	Last Charge Recovery Date	
857.643	Growth	16/03/2009	10/03/2009	
Cash Amount			0.0	
Please verify the displayed details and proceed.				
Proceed				
Back				

The Cashier after confirming the details has to key in various details like Cash amount or Cheque details, particulars of Bank Branch and click on “Proceed” button (displayed above).

20. On clicking the “Proceed” button the screen will display a screen where the Cashier will be prompted to click on “OK” button (displayed below the message “Kindly wait for the transaction to be processed. Please do not click on Refresh or Back button in the browser”). Once the “OK” button is clicked the transaction is successful and cannot be reverted back under any circumstances. Hence it is advised to exercise due diligence before clicking on “OK” button.

Welcome, cs001
 Change Cashier
 Password
 Logout
Cashier Tools
 Premium Collection
 ULIP Premium Collection
 Generate Premium Collection Invoice
 Proposal Deposit Collection
 Generate Proposal Deposit Invoice
 View Proposal Deposit Receipts
 Check Policy for Collection
 >>

Policies For Premium Payment

Customer Name:	Tushar Suresh Naik			
Policy No	Plan	FUP	Prm Amt	
893681462	181	10/06/2009	2,500.00	
No.of Units	Fund Type	Last Accounting Date	Last Charge Recovery Date	
857.643	Growth	16/03/2009	10/03/2009	
Cash Amount			<input type="text" value="2000"/>	
Please verify the displayed details and proceed.				
<input type="button" value="Proceed"/>				

Windows Internet Explorer

Kindly wait for the transaction to be processed. Please do not click Refresh or Back button in the browser.

After clicking “OK” button the following screen will be displayed giving details of the successful transaction. A link “[Click here to Print / View your Premium payment receipt](#)” (as displayed below) will also be provided just below the details of successful transaction, to view and print the premium receipt.

Welcome, cs001

[Change Cashier](#)

[Password](#)

[Logout](#)

Cashier Tools

[Premium Collection](#)

[ULIP Premium Collection](#)

[Generate Premium
Collection Invoice](#)

[Proposal Deposit
Collection](#)

[Generate Proposal
Deposit Invoice](#)

[View Proposal Deposit
Receipts](#)

Your Transaction was successful

Transaction No	MER00136269
Transaction Date	14/05/2009

[Click here to Print/View your Premium payment receipt.](#)

Your available Limit is **Rs. 24,493.00**

[Click here for another ULIP Premium Collection](#)

21. On clicking the link button, a premium receipt is generated in a separate window. Cashier has to print this receipt on his / her local laser printer.



Collecting Center : A001

Transaction No. : 136269

Date (Time) : 14/05/2009 (18:41:51)

Branch Code : CBK1
PCMC, Network Operating Center
1st Floor, Jeevan Seva Annexe,
S.V.Road, Santacruz(W)
Mumbai - 400 054
Ph. : +91-022-1251
e-mail : bo_cbk1@licindia.com

ADDITIONAL PREMIUM RECEIPT

Received with thanks Rs. 2,000.00 from policyholder Shri/Smt.Tushar Suresh Naik towards the following policy/ies

Policy No Name Agency Code	Plan Term D.O.C.	Inst. Prem(Rs) Mode Sum Assured	No Of Inst Due Fr Due To	Total Premium Late Fee Total Amt	Branch Next Due
893681462 Naik T.S. 02852935	181 20 10/12/2007	0.00 QLY 0.00	1 05/09 05/09	2,000.00 0.00 2,000.00	935 09/09
Page Total (Rs)		0.00		2,000.00 0.00 2,000.00	
Grand Total (Rs)		0.00		2,000.00 0.00 2,000.00	

FUND TYPE: Growth

Units allocated will be intimated seperately in this policy.

RUPEES TWO THOUSAND ONLY

Tushar Suresh Naik
S/12-402, Golden Nest Phase 3,
Mira Bhayander Road,
Mira Road East, Thane
401107

Consolidated Stamp Duty Paid

For Life Insurance Corporation of India,
RAJESH GUPTA(02951148)

Zindagi Ke Saath Bhi, Zindagi Ke Baad Bhi

22. After collecting premium for all the policies the Agent is required to generate an Invoice (collection summary of payment/s received) from the “Generate Premium Collection Invoice” option available under “Cashier Tools” (Cashier’s login page) as well as “Merchant Tools” (Merchant’s login page). The following screen will be displayed: -

Welcome, RAJESH GUPTA
Change Password
Logout

Merchant Tools
Cashier Login
Generate Premium Collection Invoice
Generate Proposal
Deposit Invoice

Invoice Generation Confirmation

By clicking on **Generate Invoice** you can generate the Invoice for all the pending transactions.

Please Confirm Where Do You Want To Deposit Invoice Amount

LIC Branch Branch Code

Axis Bank

Here the agent has to opt the destination (LIC Branch or Axis Bank) where he intends to deposit the amount and click on the “Submit” button. **The agent can even deposit the amount at LIC Satellite Sampark Office.** However while choosing the branch code at the time of Invoice generation the parent branch code has to be entered. **Agents should ensure that the money is deposited at the selected Office within 48 hours of the Date & time of the invoice generation.**

After clicking on the “Submit” button (as shown below), the screen will display the details of the Office selected for depositing of Invoice amount and will ask for confirmation. The Merchant / Cashier should confirm whether the displayed details are correct. Only if it is correct the Cashier / Merchant should click on “Generate Invoice” button.

Welcome, cs001
 Change Cashier
 Password

Logout

Invoice Generation - Branch Confirmation
 Branch Code: 883
 Branch Name: LIC OF INDIA,BOMBAY B O 883,

Generate Invoice Back

Cashier Tools
 Premium Collection
 ULIP Premium Collection
 Generate Premium Collection Invoice

On clicking the “Generate Invoice” button following screen will be displayed.

Welcome, cs001
 Change Cashier
 Password

Logout

Cashier Tools
 Premium Collection
 ULIP Premium Collection
 Generate Premium Collection Invoice
 Proposal Deposit Collection
 Generate Proposal Deposit Invoice
 View Proposal Deposit Receipts

LIC of India								
List of Invoice due for Payment								
Merchant ID:			A02951148					
Branch Code:			883					
Branch Name:			LIC OF INDIA,BOMBAY B O 883,					
Validation Id:			1032883					
Invoice ID	Invoice Date	Number of Transactions	Number of cheques	Number of Policies	Total cash Amount	Total cheque Amount	Total Invoice Amount	
00021059	14/05/2009	4	2	4	4400.0	7569.7	11969.7	Print Invoice

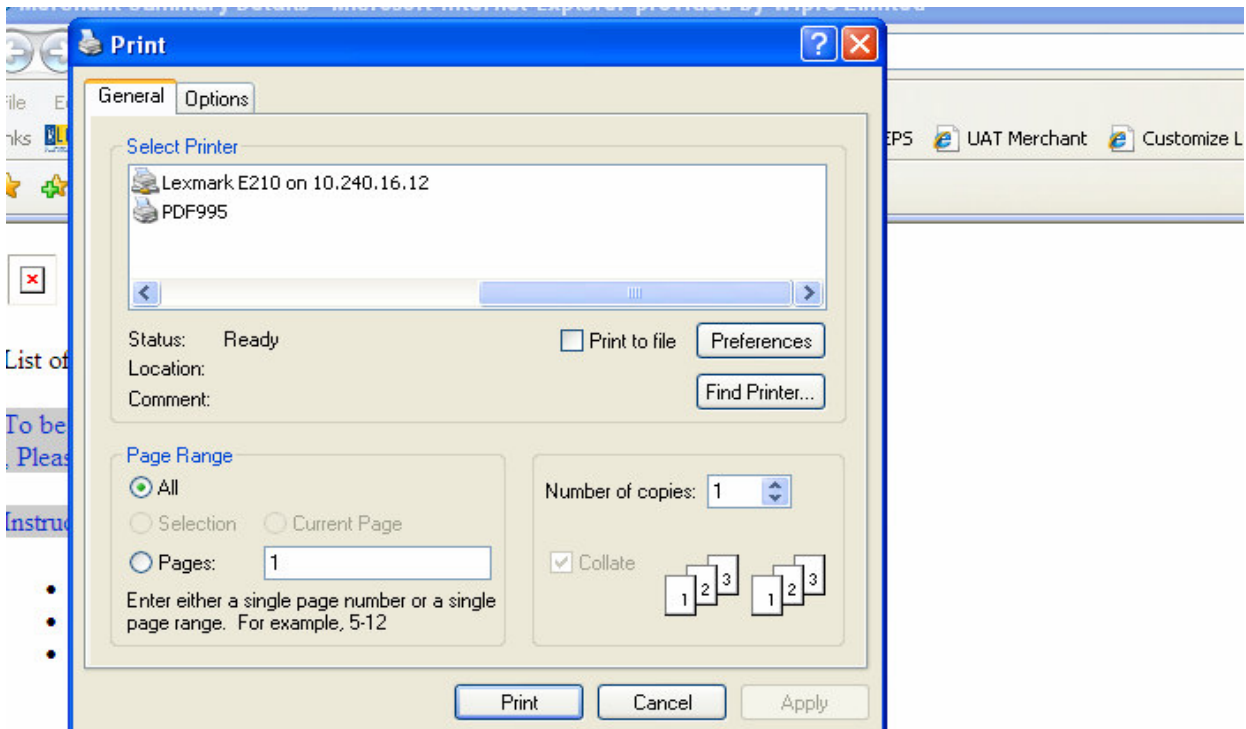
Please quote this invoice ID for reference at the LIC Branch/Bank during payment. Kindly deposit money at the earliest.

Please note that the Agent should not generate invoice for each and every transaction. Minimum one invoice should be generated for a single day’s collection/s. An invoice can also be generated for depositing of amount, where the cash limit of Rs. 1,00,000/- (or applicable as per club membership) is getting exhausted. In such situation, there can be more than one invoice for a single day. A single invoice will contain maximum 20 transactions.

If there is even a Single Cheque collection involved, Invoice can only be deposited at LIC Branch. (Very Important). Axis Bank currently does not accept cheque.

Also note that if the total cash amount in a single invoice is greater than Rs.50000/- kindly select LIC B.O. ONLY for depositing the collected amount. Please don't select AXIS bank for cash transactions (in a single invoice) greater than Rs.50000/- .

On clicking the “Print Invoice” button the following screen will be displayed. Kindly click on “Print” button to print the invoice on local printer.



Merchant ID	Invoice ID	Invoice Date	Invoice Amount	Validation Id
A02951148	00021059	14/05/2009	11,969.70	1032883

Transaction Details

Total Transactions	Total policies	Cash Amount	Cheque Amount	Number of Cheques
4	4	4,400.00	7,569.70	2

Transaction No.	Transaction Date	Cash Amt	Cheque Amt	Cheque Number	Cheque Date	Micr
00136266	14/05/2009	400.00	5,069.70	123456	06/05/2009	123456789
00136267	14/05/2009	0.00	2,500.00	123457	07/05/2009	123456788
00136268	14/05/2009	2,000.00	0.00	0		0

Sample Invoice

List of Invoice due for Payment as on 14/05/2009

To be deposited only at LIC Branch 883 (LIC OF INDIA,BOMBAY B O 883.)
Please quote the Invoice ID while making payment

Instructions to Cashier

- Please use option no.16 of Cash Module for collecting this invoice.
- DO NOT issue individual receipts for each policy.
- DO NOT USE the Miscellaneous Collection Menu for this purpose.

Merchant ID	Invoice ID	Invoice Date	Invoice Amount	Validation Id		
A02951148	00021059	14/05/2009	11,969.70	1032883		
Transaction Details						
Total Transactions	Total policies	Cash Amount	Cheque Amount	Number of Cheques		
4	4	4,400.00	7,569.70	2		
.						
Transaction No.	Transaction Date	Cash Amt	Cheque Amt	Cheque Number	Cheque Date	Micr
00136266	14/05/2009	400.00	5,069.70	123456	06/05/2009	123456789
00136267	14/05/2009	0.00	2,500.00	123457	07/05/2009	123456788
00136268	14/05/2009	2,000.00	0.00	0		0
00136269	14/05/2009	2,000.00	0.00	0		0

Kindly deposit the money within 48 hours of the 1st Transaction Date & time of the invoice generated.

23. Proposal Deposit Collection: - Selecting the Proposal Deposit Collection option by the Cashier will show the following screen. The last 3 successful transactions done by the Merchant / Cashier will be displayed at the top.

Welcome, cs001

[Change Cashier](#)

[Password](#)

[Logout](#)

Cashier Tools

[Premium Collection](#)

[ULIP Premium Collection](#)

[Generate Premium Collection Invoice](#)

[Proposal Deposit Collection](#)

[Generate Proposal Deposit Invoice](#)

[View Proposal Deposit Receipts](#)

[Check Policy for](#)

Your last Successful Proposal Deposit Collections

BOC No	BOC Date	Deposit Amt
900004	29/04/2009	11,092.00

Proposal Deposit Collection

Select the mode of payment:

Cash only

Proposers Short Name:

Deposit Type: Individual

Deposit Amount in Rs:

Deposit Plan Number:

Deposit Agency Code: 02951148

Here the Cashier will be prompted to select the mode of payment (Cash or Cheque). Here too the transaction can either be in Cash ONLY or in Cheque ONLY. The Cashier has to enter the name of the Proposer, deposit amount and the plan number.

Your last Successful Proposal Deposit Collections

BOC No	BOC Date	Deposit Amt
900004	29/04/2009	11,092.00

Proposal Deposit Collection

Select the mode of payment:

Cash only
Cash only
Cheque only

Proposers Short Name:

Deposit Type: Individual

Deposit Amount in Rs:

Deposit Plan Number:

Deposit Agency Code: 02951148

The deposit type can either be “Individual” or “Block”.

Your last Successful Proposal Deposit Collections

BOC No	BOC Date	Deposit Amt
900004	29/04/2009	11,092.00

Proposal Deposit Collection
Select the mode of payment:

Cash only ▾

Proposers Short Name:

Deposit Type: ▾

Deposit Amount in Rs:

Deposit Plan Number:

Deposit Agency Code: 02951148

After keying all the details the Cashier has to click on “Submit” button.

Your last Successful Proposal Deposit Collections

BOC No	BOC Date	Deposit Amt
900004	29/04/2009	11,092.00

Proposal Deposit Collection
Select the mode of payment:

Cheque only ▾

Cheque No: Cheque Date (dd/mm/yyyy): Cheque MICR No:

Proposers Short Name:

Deposit Type: ▾

Deposit Amount in Rs:

Deposit Plan Number:

Deposit Agency Code: 02951148

24. On clicking on the “Submit” button (shown above) the Cashier will be directed to the following screen

Welcome, cs001
 Change Cashier
 Password

Logout

Cashier Tools
 Premium Collection
 ULIP Premium Collection
 Generate Premium Collection Invoice
 Proposal Deposit Collection
 Generate Proposal Deposit Invoice
 View Proposal Deposit Receipts

Check Policy for Collection
 >>

Proposal Deposit-Collection Confirmation Page	
Cheque No:	123456
Cheque Date(dd/mm/yyyy):	06/05/2009
Cheque MICR No:	123456789
Bank Name:	
Bank Branch:	
Bank Type:	Branch Office-Bank Branch
Proposals Short Name:	Rajan S
Deposit Type:	Individual
Deposit Amount:	10000.0
Plan Number:	93
<input type="button" value="Confirm"/>	
<input type="button" value="Quit"/>	

where he / she is prompted to enter Bank details (in case of Cheque payment) like particulars of Bank Branch (whether it is a Home Branch etc. to be informed by the LIC Branch Office) :-

Welcome, cs001
 Change Cashier
 Password

Logout

Cashier Tools
 Premium Collection
 ULIP Premium Collection
 Generate Premium Collection Invoice
 Proposal Deposit Collection
 Generate Proposal Deposit Invoice
 View Proposal Deposit Receipts

Check Policy for Collection
 >>

Proposal Deposit-Collection Confirmation Page	
Cheque No:	123456
Cheque Date(dd/mm/yyyy):	06/05/2009
Cheque MICR No:	123456789
Bank Name:	Corporation Bank
Bank Branch:	Fort Branch
Bank Type:	Branch Office-Bank Branch
Proposals Short Name:	Branch Office-Bank Branch Branch Office-Bank Other Branch(Local) Other Bank-Local Outstation-Bank
Deposit Type:	
Deposit Amount:	10000.0
Plan Number:	93
<input type="button" value="Confirm"/>	
<input type="button" value="Quit"/>	

25. After completing all the details (as shown below) the Cashier has to click on the “Confirm” button.

<p>Welcome, cs001 Change Cashier Password</p> <p>Logout</p> <p>Cashier Tools</p> <ul style="list-style-type: none"> Premium Collection ULIP Premium Collection Generate Premium Collection Invoice Proposal Deposit Collection Generate Proposal Deposit Invoice View Proposal Deposit Receipts <p>Check Policy for Collection</p> <p><input type="text"/> <input type="button" value=">>"/></p>	<h3 style="text-align: center;">Proposal Deposit-Collection Confirmation Page</h3> <table border="1" style="width: 100%;"> <tr> <td style="width: 30%;">Cheque No:</td> <td><input type="text" value="123456"/></td> </tr> <tr> <td>Cheque Date(dd/mm/yyyy):</td> <td><input type="text" value="06/05/2009"/></td> </tr> <tr> <td>Cheque MICR No:</td> <td><input type="text" value="123456789"/></td> </tr> <tr> <td>Bank Name:</td> <td><input type="text" value="Corporation Bank"/></td> </tr> <tr> <td>Bank Branch:</td> <td><input type="text" value="Fort Branch"/></td> </tr> <tr> <td>Bank Type:</td> <td><input type="text" value="Branch Office-Bank Branch"/> ▼</td> </tr> <tr> <td>Proposals Short Name:</td> <td><input type="text" value="Rajan S"/></td> </tr> <tr> <td>Deposit Type:</td> <td><input type="text" value="Individual"/> ▼</td> </tr> <tr> <td>Deposit Amount:</td> <td><input type="text" value="10000.0"/></td> </tr> <tr> <td>Plan Number:</td> <td><input type="text" value="93"/></td> </tr> </table> <p style="text-align: center;"> <input type="button" value="Confirm"/> <input type="button" value="Quit"/> </p>	Cheque No:	<input type="text" value="123456"/>	Cheque Date(dd/mm/yyyy):	<input type="text" value="06/05/2009"/>	Cheque MICR No:	<input type="text" value="123456789"/>	Bank Name:	<input type="text" value="Corporation Bank"/>	Bank Branch:	<input type="text" value="Fort Branch"/>	Bank Type:	<input type="text" value="Branch Office-Bank Branch"/> ▼	Proposals Short Name:	<input type="text" value="Rajan S"/>	Deposit Type:	<input type="text" value="Individual"/> ▼	Deposit Amount:	<input type="text" value="10000.0"/>	Plan Number:	<input type="text" value="93"/>
Cheque No:	<input type="text" value="123456"/>																				
Cheque Date(dd/mm/yyyy):	<input type="text" value="06/05/2009"/>																				
Cheque MICR No:	<input type="text" value="123456789"/>																				
Bank Name:	<input type="text" value="Corporation Bank"/>																				
Bank Branch:	<input type="text" value="Fort Branch"/>																				
Bank Type:	<input type="text" value="Branch Office-Bank Branch"/> ▼																				
Proposals Short Name:	<input type="text" value="Rajan S"/>																				
Deposit Type:	<input type="text" value="Individual"/> ▼																				
Deposit Amount:	<input type="text" value="10000.0"/>																				
Plan Number:	<input type="text" value="93"/>																				

On clicking the “Confirm” button the following screen will be displayed to the Cashier / merchant giving details of the successful transaction. A link [“Click here to Print / View your Premium payment receipt”](#) (as displayed below) will also be provided just below the details of successful transaction, to view and print the premium receipt.

Welcome, cs001

[Change Cashier](#)

[Password](#)

[Logout](#)

Cashier Tools

[Premium Collection](#)

[ULIP Premium Collection](#)

[Generate Premium
Collection Invoice](#)

[Proposal Deposit
Collection](#)

[Generate Proposal
Deposit Invoice](#)

[View Proposal Deposit
Receipts](#)

Your Transaction was successful

Name of Proposer	Rajan S
BOC No	900000
BOC Date	18/05/2009
Deposit Type	Individual
Deposit Amount	10,000.00

[Click here to Print/View your proposal deposit receipt.](#)

Your available Limit is **Rs. 24,493.00**

[Click here for another Proposal Deposit Collection](#)

26. On clicking the link button, a premium receipt is generated in a separate window. Cashier has to print this receipt on his / her local laser printer.



Collecting Center : A001

BOC No. : 900000

Date (Time) : 18/05/2009 (18:04:11)

Branch. : 334

Branch Code : CBK1
PCMC, Network Operating Center
1st Floor, Jeevan Seva Annexe,
S.V.Road, Santacruz(W)
Mumbai - 400 054
Ph. : +91-022-1251
e-mail : bo_cbk1@licindia.com

PROPOSAL DEPOSIT RECEIPT

Received with thanks Rs. 10,000.00 (RUPEES TEN THOUSAND ONLY) from proposer Shri/Smt/Kum.Rajan S towards proposal deposit.

Type of Proposal Deposit : Individual

Plan (Plan Description) : 93 (New Money Back Policy - 25 years)

Agency Code : 02951148

Dev. Officer Code : 13

Paid by Cash :0.00
Cheque No :123456

Paid by Cheque :10,000.00
Cheque Date :06/05/2009

For Life Insurance Corporation of India,

RAJESH GUPTA(02951148)

This receipt is subject to realisation of cheque amount.

Acceptance of this deposit does not make the Corporation liable for acceptance of risk
-----counterfoil-----



BOC No: 900000

Date (Time): 18/05/2009(18:04:11)

Branch : 334

Type of Proposal Deposit : Individual Plan : 93 (New Money Back Policy - 25 years)

Proposers Short Name : Rajan S

Agency Code : 02951148 Agents Name : RAJESH GUPTA

Dev Officer Code : 13

Deposit Amount : Rs.10,000.00 (RUPEES TEN THOUSAND ONLY)

Paid by Cash :0.00
Cheque No :123456

Paid by Cheque :10,000.00
Cheque Date :06/05/2009

Zindagi Ke Saath Bhi, Zindagi Ke Baad Bhi

27. After completing all the proposal deposit collections, the Merchant / Cashier is required to generate an Invoice (collection summary of payment/s received) from the “Generate Proposal Deposit Invoice” option available under “Cashier Tools” (Cashier’s login page) as well as “Merchant Tools” (Merchant’s login page). The following screen will be displayed: -

Welcome, cs001
[Change Cashier](#)
[Password](#)

[Logout](#)

Cashier Tools

[Premium Collection](#)

[ULIP Premium Collection](#)

[Generate Premium Collection Invoice](#)

[Proposal Deposit Collection](#)

[Generate Proposal Deposit Invoice](#)

[View Proposal Deposit Receipts](#)

Proposal Deposit Invoice Generation Confirmation

By clicking on **Generate Invoice** you can generate the Invoice for all the pending transactions.

Here the agent has to click on the “Generate Invoice” button. On clicking the following screen will be displayed.

Welcome, cs001
[Change Cashier](#)
[Password](#)

[Logout](#)

Cashier Tools

[Premium Collection](#)

[ULIP Premium Collection](#)

[Generate Premium Collection Invoice](#)

[Proposal Deposit Collection](#)

[Generate Proposal Deposit Invoice](#)

[View Proposal Deposit Receipts](#)

[Check Policy for Collection](#)

LIC of India

List of Invoice(Proposal Deposit Transactions) due for Payment

Merchant ID:	A02951148
Branch Code:	334
Branch Name:	LIC OF INDIA, FARIDKOT BRANCH OFFICE
Validation Id:	0580334

Invoice ID	Invoice Date	Number of Transactions	Number of cheques	Total cash Amount	Total cheque Amount	Total Invoice Amount	
00021060	18/05/2009	1	1	0.0	10000.0	10000.0	<input type="button" value="Print Invoice"/>

Please quote this invoice ID for reference at the LIC Branch/Bank during payment. Kindly deposit money at the earliest.

28. The Cahier / Merchant has to click either on the “Invoice ID” (to display the Invoice details) or click on “Print Invoice” button to print the Invoice on local printer.

The screenshot shows a 'Print' dialog box with the following settings:

- Select Printer:** hp LaserJet 1300 PCL 6 (Copy 1) on 10.240.16.50
- Status:** Ready
- Page Range:** All
- Number of copies:** 1
- Collate:** Checked

Below the dialog, the following table displays invoice and transaction details:

Merchant ID	Invoice ID	Invoice Date	Invoice Amount	Validation Id
A02951148	00021060	18/05/2009	10,000.00	0580334
Transaction Details				
Total Transactions	Cash Amount	Cheque Amount	Number of Cheques	
1	0.00	10,000.00	1	

BOC No.	BOC Date	Cash Amt	Cheque Amt	Cheque Number	Cheque Date	Micr
900000	18/05/2009	0.00	10,000.00	123456	06/05/2009	123456789

Agents should ensure that the money is deposited at the selected Office within 48 hours of the Date & time of the invoice generation.

Invoices pertaining to Proposal Deposit has to be paid ONLY AT LIC Branch. (Very Important).

29. After generating the Invoices (either Premium collection Invoice/s or Proposal Deposit Invoice/s) and taking print the Invoice/s which is to be taken to the LIC Branch (Cheque Collections, Proposal Deposit Invoices and Invoices where Cash transactions of more than Rs.50000/- are involved) or Axis Bank (**ONLY** for invoices where **CASH** transactions are less than Rs.50000/-) as the case may be, for depositing the amount. **(Very Important)**.

Please ensure to have the following details while going for the payment of invoice:-

- a. Pay-in-slip
- b. Invoice Number
- c. Invoice Date
- d. Validation ID (required in case of depositing at LIC Branch)

30. The option **Pending Invoices under Merchant Tools** provides the listing and printing of outstanding Invoices to be deposited at LIC Branch or Axis Bank. Print-out of the invoice can be taken by clicking on the “Print Invoice” button against the respective Invoice-id. The detailed invoice with the Cheque details is to be submitted at the Branch.

Merchant Pending Invoices

List of Invoice due for Payment										
Merchant Id:						A02951148				
Sr. No.	Invoice ID	Date	No of Trns	No of Cheques	No of Policies	Total Cash Amt	Total Cheque Amt	Total Invoice Amt	Validation Id	
1	00021059	14/05/2009	4	2	4	4,400.00	7,569.70	11,969.70	1032883	Print Invoice

Sample Invoices

List of Invoice due for Payment as on 14/05/2009

To be deposited only at LIC Branch 883 (LIC OF INDIA,BOMBAY B O 883,)

Please quote the Invoice ID while making payment

Instructions to Cashier

- Please use option no.16 of Cash Module for collecting this invoice.
- DO NOT issue individual receipts for each policy.
- DO NOT USE the Miscellaneous Collection Menu for this purpose.

Merchant ID	Invoice ID	Invoice Date	Invoice Amount	Validation Id		
A02951148	00021059	14/05/2009	11,969.70	1032883		
Transaction Details						
Total Transactions	Total policies	Cash Amount	Cheque Amount	Number of Cheques		
4	4	4,400.00	7,569.70	2		
.						
Transaction No.	Transaction Date	Cash Amt	Cheque Amt	Cheque Number	Cheque Date	Micr
00136266	14/05/2009	400.00	5,069.70	123456	06/05/2009	123456789
00136267	14/05/2009	0.00	2,500.00	123457	07/05/2009	123456788
00136268	14/05/2009	2,000.00	0.00	0		0
00136269	14/05/2009	2,000.00	0.00	0		0

PROPOSAL DEPOSIT INVOICE

List of Invoice(Proposal Deposit Transactions) due for Payment as on 18/05/2009

To be deposited only at LIC Branch 334 (LIC OF INDIA,FARIDKOT BRANCH OFFICE)

Please quote the Invoice ID while making payment

Instructions to Cashier

- Please use option no.16 of Cash Module for collecting this invoice.
- DO NOT issue individual receipts for each policy.
- DO NOT USE the Miscellaneous Collection Menu for this purpose.

Merchant ID	Invoice ID	Invoice Date	Invoice Amount	Validation Id		
A02951148	00021060	18/05/2009	10,000.00	0580334		
Transaction Details						
Total Transactions	Cash Amount	Cheque Amount	Number of Cheques			
1	0.00	10,000.00	1			
.						
BOC No.	BOC Date	Cash Amt	Cheque Amt	Cheque Number	Cheque Date	Micr
900000	18/05/2009	0.00	10,000.00	123456	06/05/2009	123456789

31. **View Proposal Deposit Receipts**: - To view Proposal deposit receipts the Cashier / Merchant has been provided one option under “Cashier Tools”. On clicking the option “**View Proposal Deposit Receipts**” the following screen will be displayed. Here the Cashier / Merchant will be prompted to key in BOC number and BOC date.

Welcome, cs001

Change Cashier

Password

Logout

Cashier Tools

Premium Collection

ULIP Premium Collection

Generate Premium
Collection Invoice

Proposal Deposit
Collection

Generate Proposal
Deposit Invoice

View Proposal Deposit
Receipts

Enter Proposal Deposit Transaction Details

BOC No:	<input type="text"/>
BOC Date:	<input type="text"/> (dd/mm/yyyy)
<input type="button" value="Display Details"/>	

32. After keying the BOC number and BOC date, the Cashier / Merchant has to click on “Display Details” button. On clicking the following screen will be displayed.

Enter Proposal Deposit Transaction Details

BOC No:	<input type="text" value="900000"/>
BOC Date:	<input type="text" value="18/05/2009"/> (dd/mm/yyyy)
<input type="button" value="Display Details"/>	

33. On clicking on “Display Details” button the following screen will be displayed.

Merchant Proposal Deposit Collection Transaction
[Details](#) [Back](#)

SR. No.	Merchant ID	BOC No.	BOC Date	Total Amt	Deposit Type.	Short Name	Branch Code	View Receipt
1	A02951148	900000	18/05/2009	10000.0	Individual	Rajan S	334	Click

The Merchant / Cashier has to click on the link “Click” provided below the column “View Receipt” and take printout of the same.

34. The LIC Branch is having the option No.16 (FEAP Cash module) in the Normal Cash Collection menu wherein the amount can be collected at LIC branches by entering the Merchant ID, Invoice number, Invoice date, Invoice amount and Validation ID.

All the cheque’s being deposited by any Merchant, in LIC Branch Offices should invariably have the following details written behind the cheque:

- a) Policy Number
- b) Merchant ID
- c) Invoice ID

A Stamp in the following format may be put behind the cheque: -

LIC CASHIER TO COLLECT USING CASH OPTION 16
--

For any assistance write to: agent_support@licindia.com, or contact the following personnel:

Mr. Ketan Purandare (AO)	022-67090501
Mrs S K Kulkarni (AO)	022-67090502

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