Bajaj Allianz Life Insurance Co. Ltd. WEO Agency Maintenance (User Manual)

WEO Agency Maintenance (User Manual)

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1 INTRODUCTION

1.1 About This Document

This is the User Manual for WEO Agency Maintenance.

1.2 Basis Of Document

This document is based on the Agency Maintenance of WEO Indigo - OPUS.

1.3 Objectives

The primary objective of this document is to give a detailed walkthrough for the Agency Maintenance module of WEO.

1.4 Related Documents

1.5 Document Structure

2 CONCEPTS AND PROCESS FOR AGENCY MAINTENANCE

2.1 Concept for Agency Maintenance

This module is meant for maintaining ICCs of Bajaj Allianz Life. Following options are available:

Create Agent

New Agent is created based on Branch code and STM code selected.

• Update ICC Details Details of agent selected from the agent list can be updated.

2.2 Work-Flow

2.2.1 Login



Screen Name	Indigo-OPUS Login Screen
Description	The user has to login into the system with a valid username and password to access
	the system.
Next Screen	WEO Main Menu is visible on successful authentication of the logged in user.

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On Error Forgot Password / Login Screen

2.2.2 Forgot Password

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	Hint Answer		
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Screen Name	Indigo-OPUS Forgot Password Screen
Description	The user has to answer the Hint Question correctly to get a new password.
Next Screen	Indigo-OPUS Login Screen with the new password is visible on successful
	authentication of the hint answer.
On Error	Forgot Password / Login Screen

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2.2.3 New Password Screen

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Screen Name	Indigo-OPUS Forgot Password Screen
Description	The user is issued a new password, through which the user can login to the system.
	The user can later change the password, if required, from the Change Profile option
	in the system
Next Screen	WEO Main Menu is visible on successful authentication of the logged in user.
On Error	Forgot Password / Login Screen

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2.2.4 WEO Main Menu

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⊡ <u>New Business</u>		
⊡ <u>Cashier</u>		
⊡ <u>Customer Partner</u>		
➡ Agency Maintenance		
⊡ <u>Home</u>		
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Screen Name	Indigo-OPUS WEO Main Menu
Description	This is the WEO Main Menu. The user can choose any of the options available in
	the menu.
Next Screen	Depends on what option the user chooses from the menu
On Error	

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2.2.5 Main Agency Maintenance Screen

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⊡ <u>Cashier</u>					
⊡ <u>Customer Partner</u>					
Agency Maintenance					
⊡ <u>Home</u>					
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Screen Name	Indigo-OPUS WEO Agency Maintenance Screen
Description	This is the main Agency Maintenance Screen.
Next Screen	Agency Maintenance Screen
On Error	

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2.2.6 Agency Maintenance Screen

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Screen Name	Indigo-OPUS WEO Agency Maintenance Screen	
Description	This screen helps user search Agents based on Branch code and STM code as	
	criteria. Agents from list can be Updated from here. Also new Agents can be added	
	based on selected Branch code and STM code.	
	User can Exit Screen using Link 'Exit'.	
Next Screen	Based on Button clicked.	
On Error		

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2.2.7 Add/Update Agent Screen

Screen Name	Indigo-OPUS WEO Print Add/Update Agent Screen	
Description	This screen allows user to Add new Agent or Update existing Agents that is	
	selected from the Agency Maintenance Screen's Search Results. The fields	
	'Partner id', 'Address' and 'ICC Name' are fetched from Search Customer-Partner	
	Screen.	
	User can Exit Screen Using 'Cancel And Exit' link	
Next Screen	Agency Maintenance Screen.	
On Error	Add/Update Agent Screen.	

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Search Customer-Partner Screen

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The user can exit from the system by selecting the **Logout** option from the screen.