

Steps for Proposal Completio under "ANANDA"

1	CHECK THAT AGENTS MOBILE NUMBER IS LINKED WITH ADHAR
2	LA MOBILE NUMBER IS LINKED WITH ADHAR
3	NON MEDICAL/ LESS THAN 15 LACS/ NOT NACH MODE/NOMINEE NOT MINOR/DEV OFF MHR NOT REQ/MAJOR LIFE/PRV PROPOSAL AT STD RATE/NO DATE BACK
4	IF ALL ABOVE ARE TRUE THEN CHECK FOR MICROSOFT EDGE BROWSER IN YOUR LAPTOP
5	GOTO SITE https://onlinesales.licindia.in/eSales/e2e
6	ON THE FIRST SCREEN YOU WILL SEE INSTRUCTIONS
7	e-KYC
	CLICK ON NO 2-> Click here to download zipped Aadhaar File: Click here
	KEY IN ADHAR DETAILS OF AGENT AND DOWNLOAD (ONLY ONCE) (WRITE DOWN PASSCODE)
	(KEY IN ADHAR NUMBER -> KEY IN SECURITY CODE -> otp will be sent on mobile -> now key in OTP and above that key in simple passcode. Please write down this code as this is a password of e-kyc file.)
8	e-SIGN
	CLICK ON NO 3-> 3. To generate Aadhar VID, use this link : Click here
	GENERATE VID OF AGENT (KEY IN ADHARNO OF AGENT) (SMS/MAIL TO AGENT) (note down this number)
	GENERATE VID OF LA (KEY IN ADHARNO OF LA) (SMS/MAIL TO LA) (note down this number)
9	AFTER ALL ABOVE STEPS CLICK ON BOX FOR I AGREE.
10	ENTER MERCHANT ID AND PASSWORD
11	KEY IN AGENTS MOBILE NUMBER (WHICH IS LINKED WITH ADHAR)
	PASSCODE OF AGENTS ADHAR
12	CLICK ON CONTINUE
13	OTP WILL BE SENT TO AGENTS MOBILE-AFTER KEYING IN THAT ->ALL ADHAR DETAILS WILL BE DISPLAYED.
14	CLICK ON CONTINUE
15	GENERAL INFORMATION PAGE WILL BE DISPLAYED
16	CLICK ON PREMIUM-CALCULATOR & LEAD GENERATION
17	SELECT PLAN NUMER
18	ENTER DTOB AND OTHER DETAILS
19	CONFIRM AND PROCEED
20	GENERATE LEAD (THIS WILL CREATE ACCESS-ID -> NOTE DOWN THIS ACCESS ID IT WILL REQUIRE FURTHER -> CHECK MAIL OF LA's MAIL ID)
21	PROCEED
22	NOW IT WILL GO TO OFFLINE KYC OF LA
23	GENERATE ZIP FILE OF LA's ADHAR (NOTE DOWN PASSOCDE)
	(KEY IN ADHAR NUMBER -> KEY IN SECURITY CODE -> otp will be sent on mobile -> now key in OTP and above that key in simple passcode. Please write down this code as this is a password of e-kyc file.)

24	PROCEED
25	ON THE SCREEN KEY IN MOBILE NO OF LA
	KEY IN PASSCODE OF ADHAR FILE
	SELECT FILE FROM DOWNLOADS
	PROCEED
	OTP WILL BE SENT TO LA'S MOBILE-AFTER KEYING IN THAT ->ALL ADHAR DETAILS WILL BE DISPLAYED.
26	CONTINUE
27	KEY IN ADDRESS AND OTHER DETAILS
28	SAVE AND PROCEED
29	PLACE OF BIRTH AND EDUCATION DETAILS
29	SAVE AND PROCEED
30	ENTER OCCUPATION AND OTHER DETAILS
31	SAVE AND PROCEED
32	ENTER PRV POLICY DETAILS
33	SAVE AND PROCEED
34	SELECT LIVE AND DEAD FAMILY HISTORY
35	SAVE AND PROCEED
36	MEDICAL AND OTHER DETAILS
37	SAVE AND PROCEED
38	BANK AND NOMINEE DETAILS
39	SAVE AND PROCEED
40	CORONA QUESTIONARE
41	SAVE AND PROCEED
42	CLICK ON I AGREE FOR DECLAIRATION
43	FILL ACR COMPLETELY (AGENTS CONFIDENTIAL REPORT)
44	SAVE AND PROCEED
45	IT WILL SHOW THREE TABS
46	VIEW PROPOSAL ----- EDIT PROPOSAL --- ATTACH BOC
	ATTACH BOC TO THE PROPOSAL
	AFTER SUCCESSFUL ATTACHMENT OF BOC MAIL WILL BE SENT TO LA -> IT WILL CONTAIN A LINK FOR APPROVAL
	IF LA APPROVES ON LINK -> IT WILL LEAD TO E-SIGN THROUGH LINK -> CLICK ON SUBMIT
47	CLICK ON E-SIGN TAB IN TOP LINE
48	FOR ACR -> KEY IN ACCESS ID (GENERATED IN POINT NO 20) -> CLICK ON SUBMIT