Government Business Product Schemes

Bank of India

Version 1.2

Version No	Date	Author	Significant Changes
1.0	29th Oct 2022	Varsha Masurkar	Initial Version
1.1	02nd Nov 2022	Ritesh Dubey	NPS, SGB Changes
1.2	10th Nov 2022 04th Jan 2023	Ritesh Dubey	NPS Status Check, SGB , FRSB , SCSS , PPF and SSA Schemes

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User Manual for Government Business Products

Below Government Business Products Schemes are made available in Agent Login to Log Offline activities done by BC agents for below schemes.

1. National Pension Scheme (NPS)
2. Sovereign Gold Bond (SGB)
3. Floating Rate Saving Bond-RBI (FRSB)
4. Senior Citizen Savings Scheme (SCSS)
5. Public Provident Fund (PPF)
6. Sukanya Samriddhi Account (SSA)

Using the module, the offline activities will be logged at FIG and will be approved by branch once BC submits the hard copies of documents.

1. National Pension Scheme (NPS) Account Opening:

Step1: BC agent must open NPS through Online mode first through given link below:
URL:- https://www.bankofindia.co.in/NPSOnline

On this Bank page 2 options are available to open NPS:

1. CRA-KFINTECH
2. CRA-NSDL

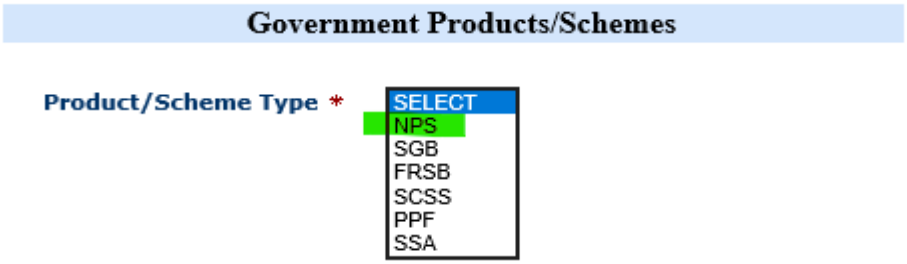
BC agent can select any of the option to open NPS account for the customer.

(Kindly refer Bank's User Manual for NPS registration).

Then they have to seed the NPS lead details in FI portal as mentioned below after successful NPS account opened.

Step2: After successful Agent Login, Go to **Lead Source Type -> Government Business Schemes** Menu.

Step 3: Below Page will be displayed to the user. Select the Scheme "NPS" from Scheme Type Dropdown to capture NPS Details of the customer.

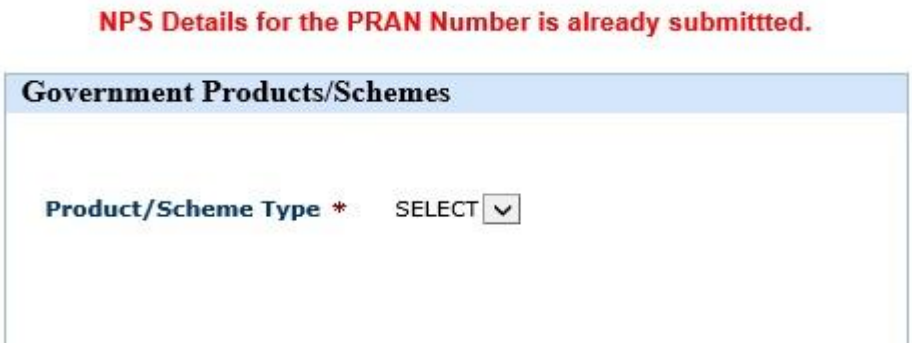


Step4: Enter the all required NPS details of the customer whose NPS account was opened by the Agents in Online mode. Click on Submit.

Note: Kindly enter all correct NPS details (PRAN, PAN and Mobile Number) in portal, in case of any field's data mismatch then NPS record will be rejected.

Step5: Agent can then click on Submit button to generate the NPS lead. On click of submit, Receipt will be generated as below:

If the Agent attempts to Log NPS details of the already logged PRAN number, then below message will be displayed in the system:



If the NPS details are not logged successfully in FI portal due to network, unknown issues, etc. then below message will be displayed in FI portal:

In this case, NPS details are not registered in FI system. Agent has to retry logging the NPS Details again to be eligible for Commission.

If the same issue persists for more than 3 times, then BCO can take up the issue with FITCS DC helpdesk Team.

Note: FI gateway will receive NPS details from Bank on fortnightly basis.

The PRAN number provided by Agent will be verified with the data provided by Bank in FI application.

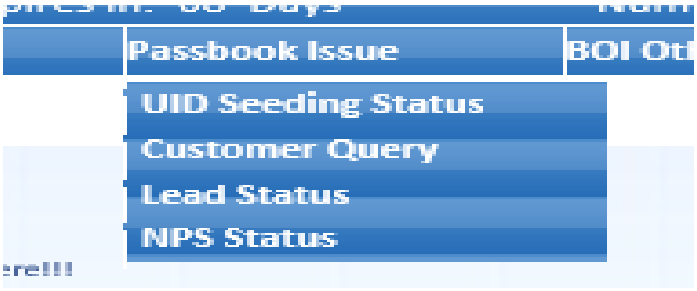
BC agent will be eligible for commission only on successful authorized NPS data.

2. National Pension Scheme (NPS) Status Check:

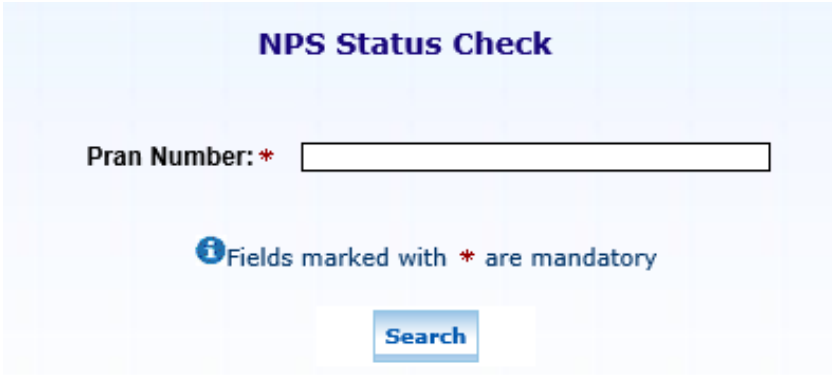
Step1: After submission of NPS account opening leads in FI portal, records will be authorized on fortnightly after NPS data received from NPS Bank Team.

Step2: BC agent can check the NPS status of the generated NPS leads through NPS Status menu.

Go to: Passbook Issue -> NPS Status



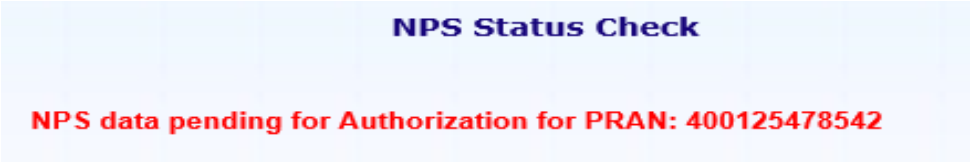
Step3: After click on NPS Status menu, below page will appear to enter PRAN number.



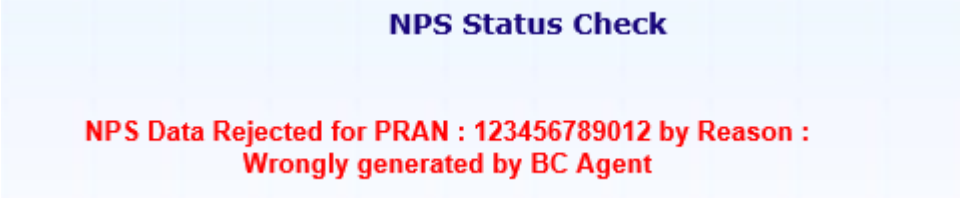
Step4: Agent have enter correct PRAN number which is generated by him/her at the time of NPS account opening and leads generation. Then click on Search button.

If NPS leads are successfully authorized then below receipt will print with status "Success".

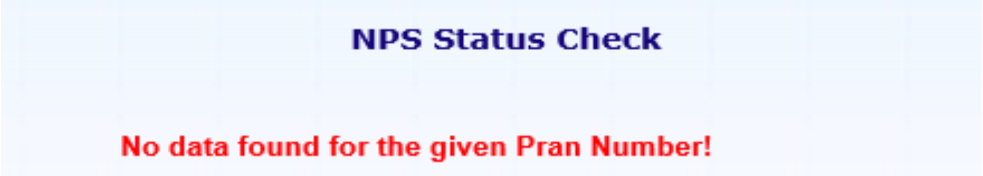
If NPS leads are pending for authorization then below message will print:



If NPS leads are Rejected/Failed then below message will print with Rejected/Failed reason.



If NPS leads are not found or not generated by BC agent then below message will print:



3. Sovereign Gold Bond (SGB)

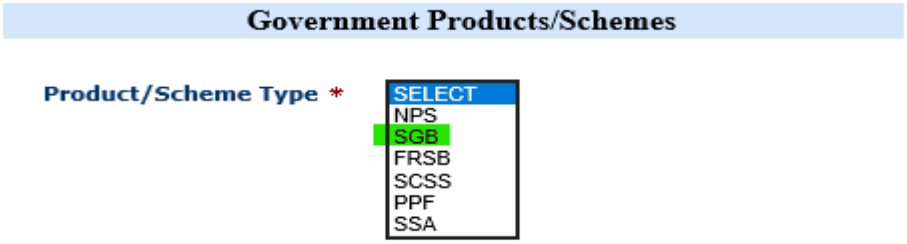
For SGB account opening BC agent must contact branch for SGB creation for the customer.

BCA have to convince to customer to open SGB and visit branch along with customer to open the SGB in Bank.

After successful SGB creation only, BCA can seed the SGB lead details into BC portal.

Step1: After successful Agent Login, Go to **Lead Source Type -> Government Business Schemes** Menu

Step 2: Below Page will be displayed to the user. Select the Scheme "**SGB**" from Scheme Type Dropdown.



Step 3: Enter all the required fields as provided in SGB Form as below and Click on Submit

Step 4: Below Receipt will be generated on successful submission of SGB Details.

Note: On successful submission of SGB details, the same will be available to Branch for approval.

After the branch approves the SGB details, agent will be eligible for commission. If the branch rejects the SGB details, then agent will not be eligible for commission.

If the details are not submitted successfully, then below message will be displayed:

4. Floating Rate Saving Bond-RBI (FRSB)

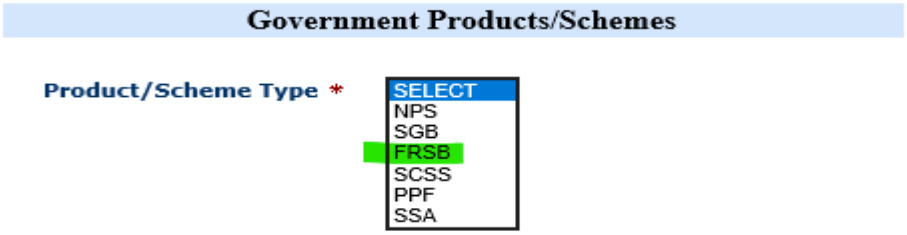
For FRSB account opening BC agent must contact branch for FRSB creation for the customer.

BCA have to convince to customer to open FRSB and visit branch along with customer to enroll FRSB in Bank.

After successful FRSB creation only, BCA can seed the FRSB lead details into BC portal.

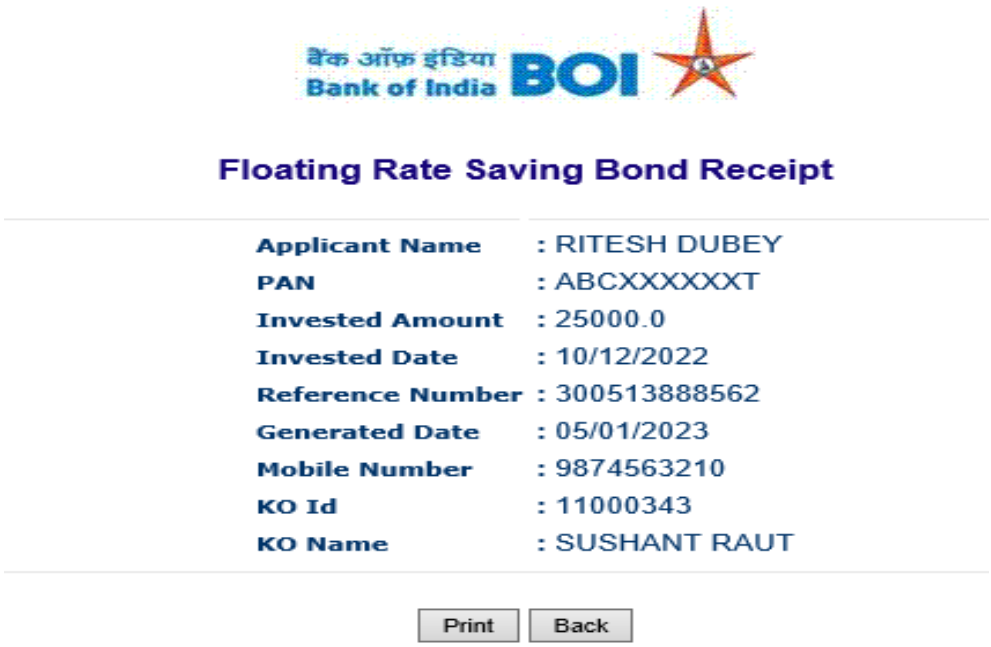
Step1: After successful Agent Login, Go to **Lead Source Type -> Government Business Schemes** Menu.

Step 2: Below Page will be displayed to the user. Select the Scheme "**FRSB**" from Scheme Type Dropdown.



Step 3: Enter all the required fields as provided in FRSB Form as below and Click on Submit.

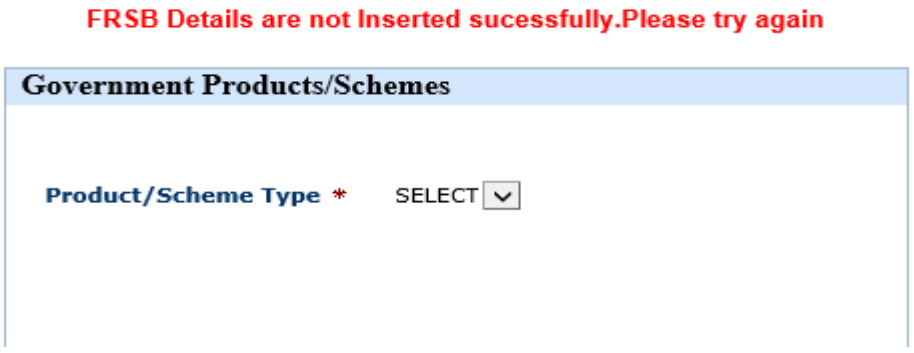
Step 4: Below Receipt will be generated on successful submission of FRSB Details.



Note: On successful submission of FRSB details, the same will be available to Branch for approval.

After the branch approves the FRSB details, agent will be eligible for commission. If the branch rejects the FRSB details, then agent will not be eligible for commission.

If the details are not submitted successfully, then below message will be displayed:



5. Senior Citizen Savings Scheme (SCSS)

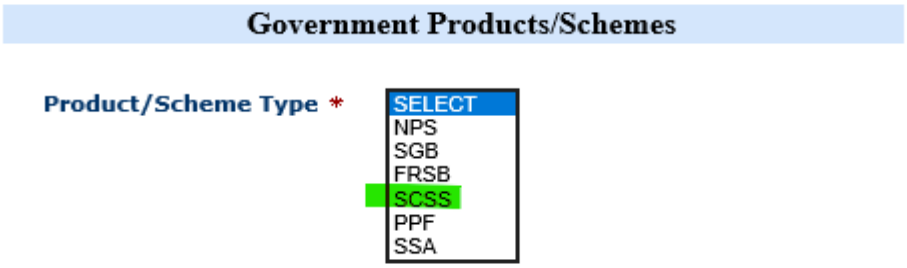
For SCSS account opening BC agent must contact branch for SCSS creation for the customer.

BCA have to convince to customer to open SCSS and visit branch along with customer to enroll SCSS in Bank.

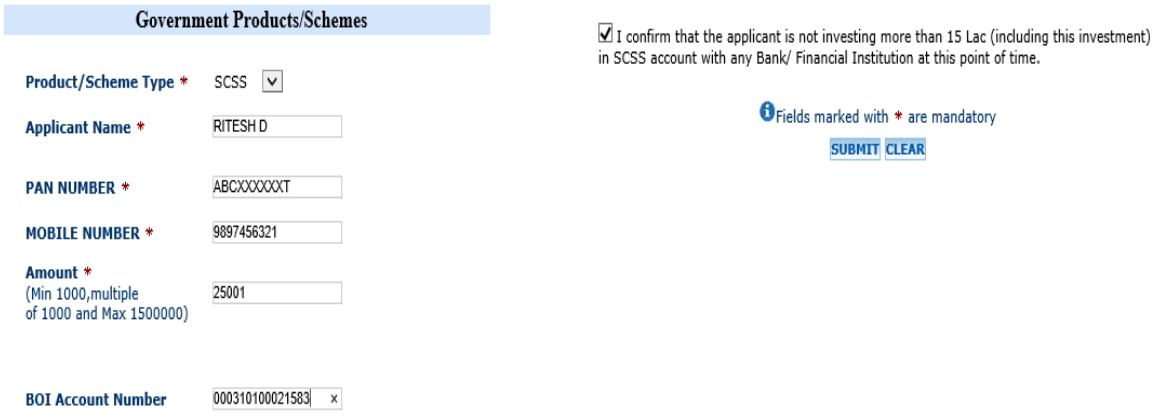
After successful SCSS creation only, BCA can seed the SCSS lead details into BC portal.

Step1: After successful Agent Login, Go to **Lead Source Type -> Government Business Schemes** Menu

Step 2: Below Page will be displayed to the user. Select the Scheme "**SCSS**" from Scheme Type Dropdown.



Step 3: Enter all the required fields as provided in SCSS Form as below and Click on Submit.

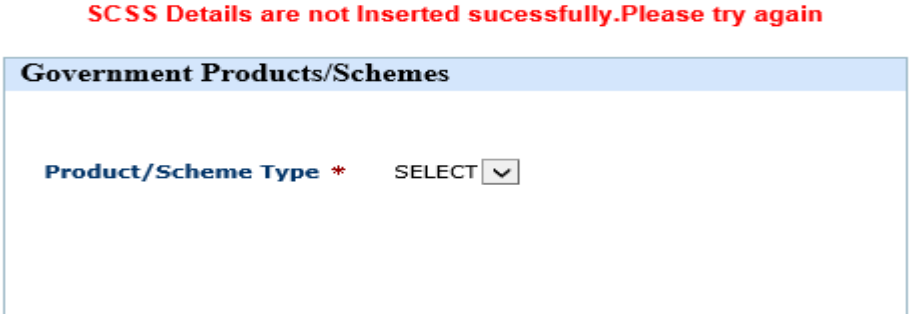


Step 4: Below Receipt will be generated on successful submission of SCSS Details.

Note: On successful submission of SCSS details, the same will be available to Branch for approval.

After the branch approves the SCSS details, agent will be eligible for commission. If the branch rejects the SCSS details, then agent will not be eligible for commission.

If the details are not submitted successfully, then below message will be displayed:



6. Public Provident Fund (PPF)

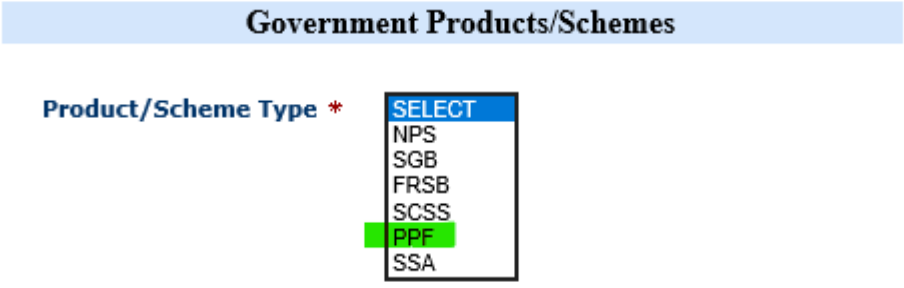
For PPF account opening BC agent must contact branch for PPF account creation or Adding SI in Existing PPF account for the customer.

BCA have to convince to customer to open PPF and visit branch along with customer to enroll PPF in Bank.

After successful PPF account creation or SI in existing PPF, BCA can seed the PPF lead details into BC portal.

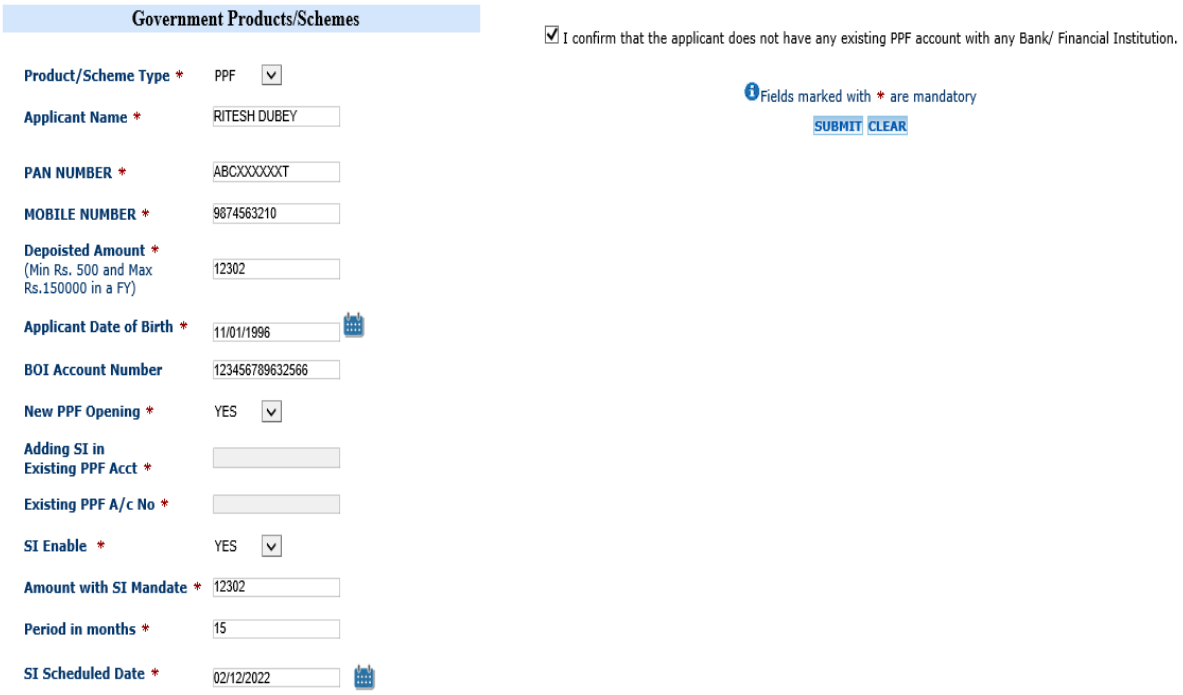
Step1: After successful Agent Login, Go to **Lead Source Type -> Government Business Schemes** Menu

Step 2: Below Page will be displayed to the user. Select the Scheme "**PPF**" from Scheme Type Dropdown.

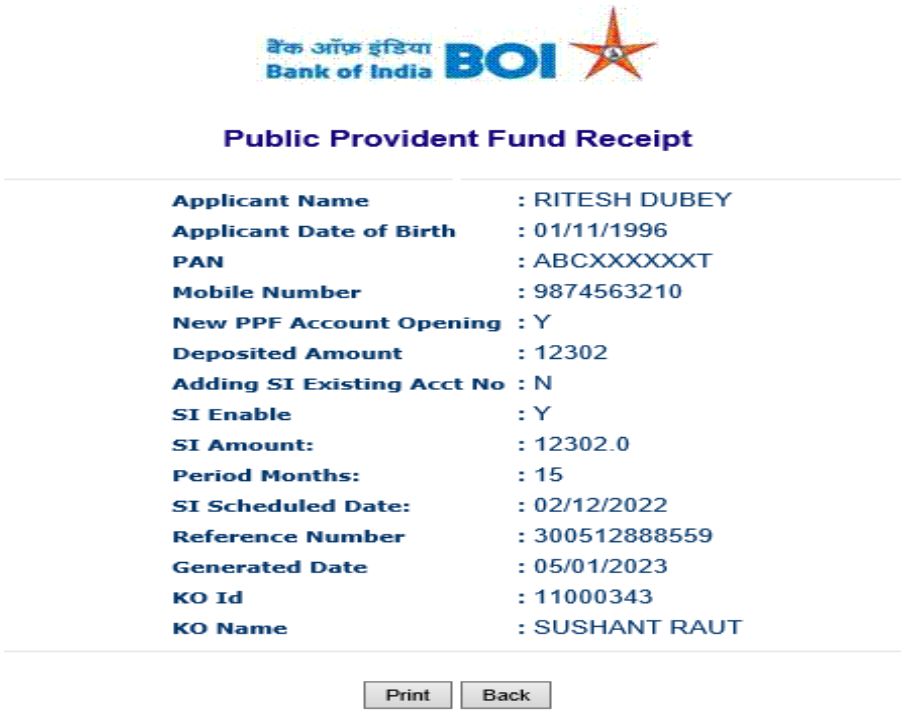


1. New PPF Account Creation:

Step 3: Enter all the required fields as provided in PPF Form as below and Click on Submit.

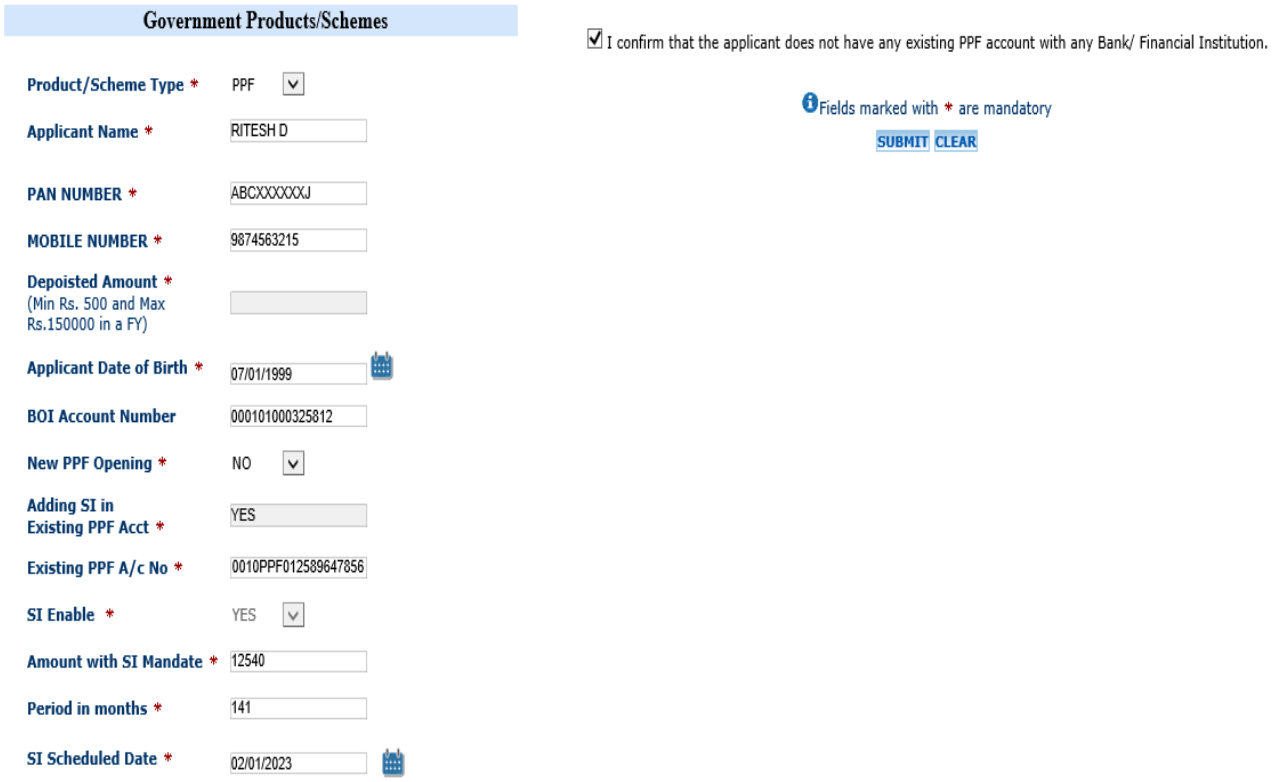


Step 4: Below Receipt will be generated on successful submission of PPF Details.



2. Adding SI in existing PPF Account:

Step 5: Enter all the required fields as provided in PPF Form as below and Click on Submit.



Step 6: Below Receipt will be generated on successful submission of PPF Details.

Note: On successful submission of PPF details, the same will be available to Branch for approval.

After the branch approves the PPF details, agent will be eligible for commission. If the branch rejects the PPF details, then agent will not be eligible for commission.

If the details are not submitted successfully, then below message will be displayed:

PPF Details are not Inserted sucessfully.Please try again

7. Sukanya Samriddhi Account (SSA)

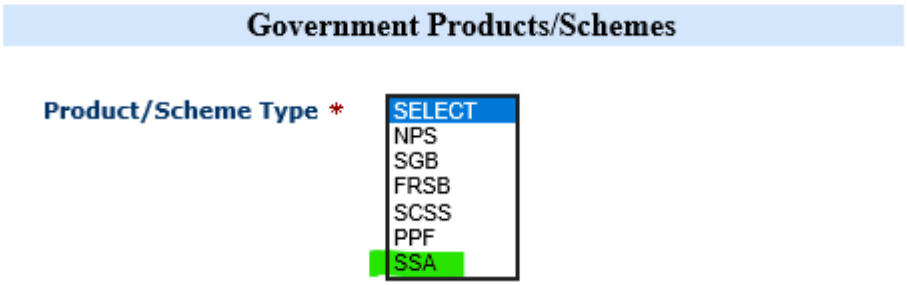
For SSA account opening BC agent must contact branch for SSA account creation or Adding SI in Existing SSA account for the customer.

BCA have to convince to customer to open SSA and visit branch along with customer to enroll SSA in Bank.

After successful SSA account creation or SI in existing SSA, BCA can seed the SSA lead details into BC portal.

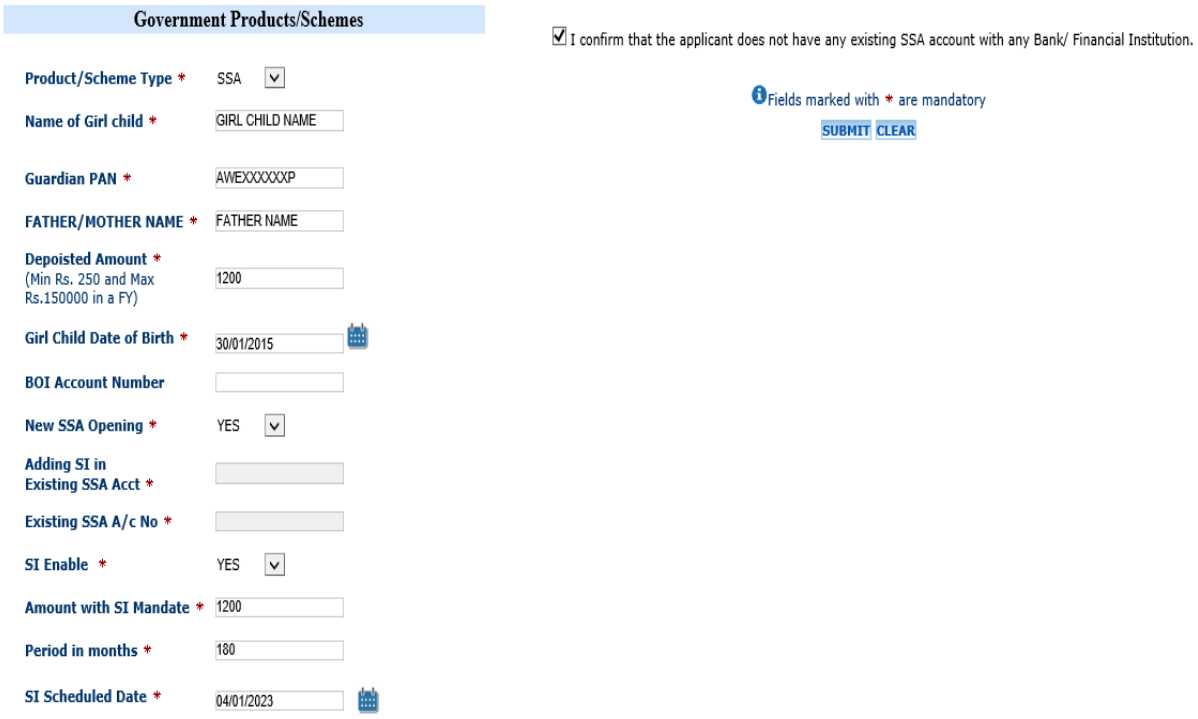
Step1: After successful Agent Login, Go to **Lead Source Type -> Government Business Schemes** Menu

Step 2: Below Page will be displayed to the user. Select the Scheme "**SSA**" from Scheme Type Dropdown.

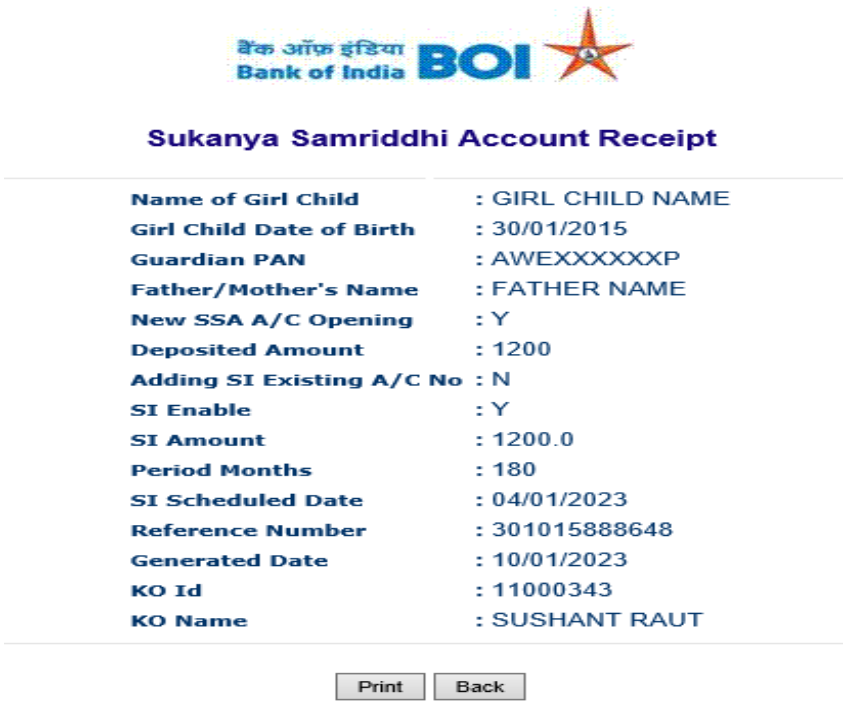


1. New SSA Account Creation:

Step 3: Enter all the required fields as provided in SSA Form as below and Click on Submit.



Step 4: Below Receipt will be generated on successful submission of SSA Details.



बैंक ऑफ़ इंडिया Bank of India BOI

Sukanya Samriddhi Account Receipt

Name of Girl Child	: GIRL CHILD NAME
Girl Child Date of Birth	: 30/01/2015
Guardian PAN	: AWEXXXXXXP
Father/Mother's Name	: FATHER NAME
New SSA A/C Opening	: Y
Deposited Amount	: 1200
Adding SI Existing A/C No	: N
SI Enable	: Y
SI Amount	: 1200.0
Period Months	: 180
SI Scheduled Date	: 04/01/2023
Reference Number	: 301015888648
Generated Date	: 10/01/2023
KO Id	: 11000343
KO Name	: SUSHANT RAUT

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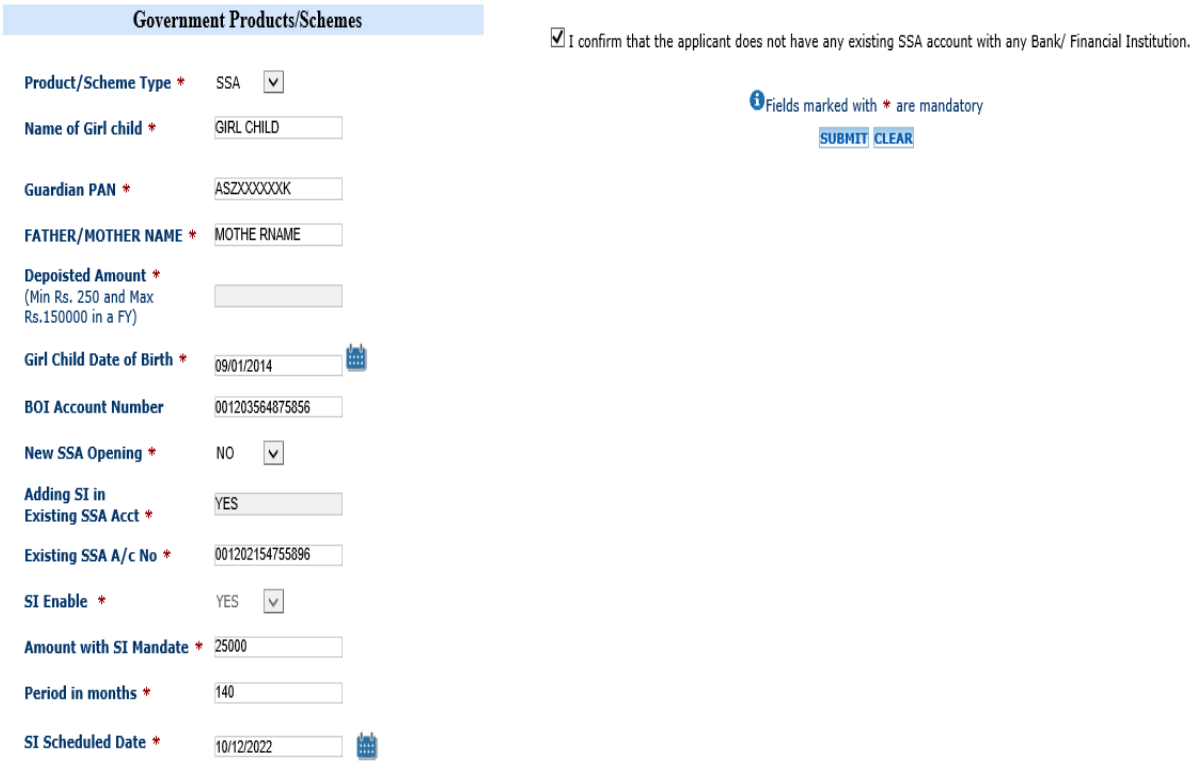
2. Adding SI in existing SSA Account:

Step 5: Enter all the required fields as provided in SSA Form as below and Click on Submit.



Government Products/Schemes

Product/Scheme Type * SSA

Name of Girl child * GIRL CHILD

Guardian PAN * ASZXXXXXK

FATHER/MOTHER NAME * MOTHE RNAME

Depoisted Amount * (Min Rs. 250 and Max Rs.150000 in a FY)

Girl Child Date of Birth * 09/01/2014

BOI Account Number 001203564875856

New SSA Opening * NO

Adding SI in Existing SSA Acct * YES

Existing SSA A/c No * 001202154755896

SI Enable * YES

Amount with SI Mandate * 25000

Period in months * 140

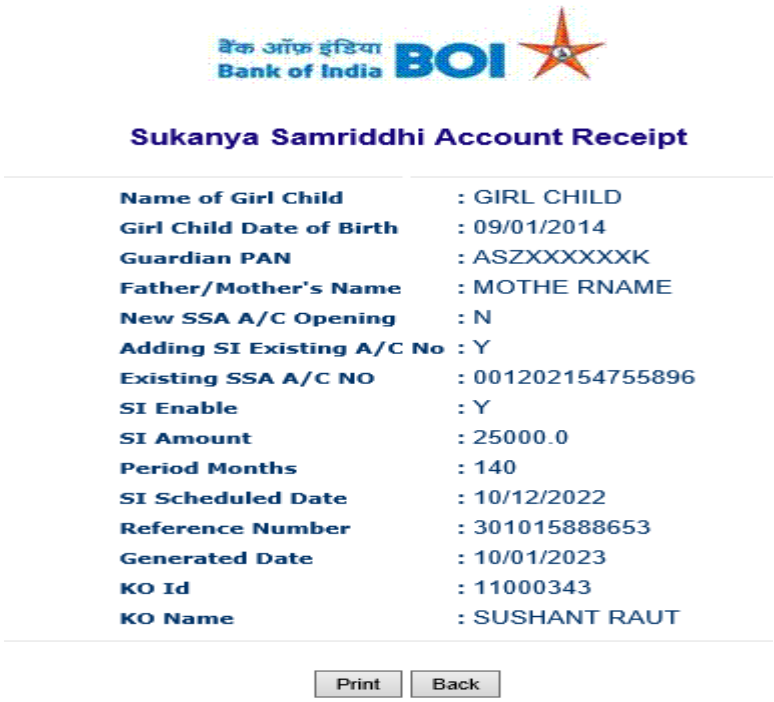
SI Scheduled Date * 10/12/2022

☑ I confirm that the applicant does not have any existing SSA account with any Bank/ Financial Institution.

Fields marked with * are mandatory

SUBMIT CLEAR

Step 6: Below Receipt will be generated on successful submission of SSA Details.



बैंक ऑफ़ इंडिया Bank of India BOI

Sukanya Samriddhi Account Receipt

Name of Girl Child	: GIRL CHILD
Girl Child Date of Birth	: 09/01/2014
Guardian PAN	: ASZXXXXXXK
Father/Mother's Name	: MOTHE RNAME
New SSA A/C Opening	: N
Adding SI Existing A/C No	: Y
Existing SSA A/C NO	: 001202154755896
SI Enable	: Y
SI Amount	: 25000.0
Period Months	: 140
SI Scheduled Date	: 10/12/2022
Reference Number	: 301015888653
Generated Date	: 10/01/2023
KO Id	: 11000343
KO Name	: SUSHANT RAUT

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Note: On successful submission of SSA details, the same will be available to Branch for approval.

After the branch approves the SSA details, agent will be eligible for commission. If the branch rejects the SSA details, then agent will not be eligible for commission.

If the details are not submitted successfully, then below message will be displayed:

SSA Details are not Inserted sucessfully.Please try again

Thank You