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PURPOSE

To take Inventory of all Account Opening Documents (AOD), Archive and Store these safely and systematically for easy retrieval.

SCOPE

This process will be closely monitored and followed at all the warehouses across India. Branch Manager will be responsible for the process to be followed at the respective locations.

REFERENCE

NA

RESPONSIBILITY

Branch Manager

The Customer requirements, and OEC customized process to achieve them are to be defined in the specific Procedure released by *Sales Team.* With this input, required operations to be undertaken are specified in this procedure.

He is authorized to assign the part or all of this procedure to the team leaders under his/her control when the process needs various services like Pick-UP, Registration, Scanning, Data-entry, and Storage.

PROCEDURE / DESCRIPTION OF ACTIVITIES

A. Inventory at Site.

1. For HDFC all the AOD forms are centralized in one place (CPU/RPU), from where OEC Staff has to Pick-up the forms after the inventory is done from the site.

2. Do the Data entry work, capturing of the Account Number against S series file barcode of AOD (Account Opening Documents) is done by OEC staff at the HDFC site

3. The Bank will provide the complete data base of all AODs to OEC which has to be uploaded to OEC server.

4. *The AOD forms are stamped in Ink, with Box Serial number and Counter Number in serial order in the box if the file barcodes are not used. Box and files are bar-coded in serial number wise. (Barcode labels are supplied by OEC)*

5. The Data entry is done as per the requirement specified by HDFC.

B. Pickup:-

1. *Follow the Process for Managing Pickup (OEC-OPS-PP-P-01).*

C. Archiving:-

1. The AOD data base is maintained at HDFC (CPU/RPU) site, by HDFC and all requests for retrievals are generated from this data base using the Job-cards Formats and sent to OEC for necessary action.

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D. Storage

1. *Store the Universal boxes in the allocated Rack space at the warehouse in the shelves above Level 01.*

ENCLOSURES

NA

FORMATS / EXHIBITS

NA