Send Receipt

This section describes how to forward or mark a receipt to another user in an organization or to an external organization. Receipts which are in pending state, i.e. receipts in Inbox/Inbox Folder/Created and Send can be forwarded further. Closed receipts are required to be re-opened first before forwarding.

Important Points:

- ✓ Receipt can be forwarded to only one user in '**To**' and multiple in '**CC**'.
- ✓ Physical receipts should be in received state in **Inbox/Inbox Folder** to forward further.
- ✓ Multiple receipts can be sent by selecting multiple receipts from **Inbox/Inbox Folder** and **Created** list page.
- ✓ Receipts forwarded from **Sen**t list, are sent as CC (copy) of the main receipt.

STEPS TO FOLLOW:

1. Select receipt(s) or click opens a receipt from **Inbox/Inbox sub-folder/Created** list.

2. Click '**Send'** menu.

Figure 123

3. Enter the user details in '**To'** field. In case you wish to forward its copies to multiple users, enter user(s) details in '**CC**'.

4. If necessary, you may assign **Due date**, **Action**, **Priority** to the receipt. Select '**Initiate Action'**, if required. (Initiate action is configuration and role-based available feature)
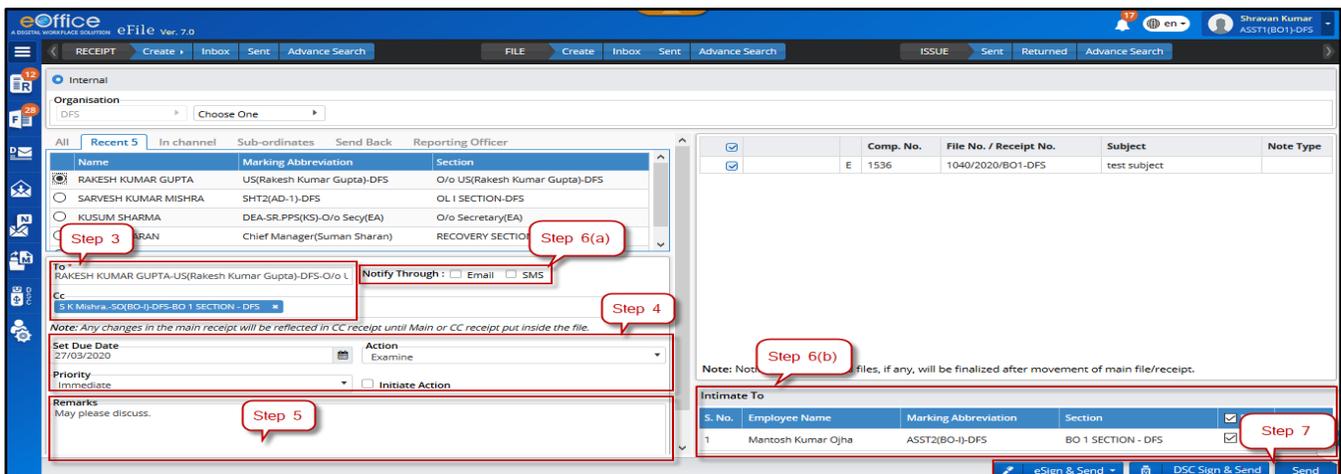

Figure 124

5. Enter **Remarks**. (mandatory for **'Initiate Action'**)

6. Choose **ALERTS** (if required) -

   a) **Notify Through Email and/or SMS** – To notify receiver of the receipt via e-mail and/or SMS.

   b) **Intimate To** – To notify the users in the previous movements of the receipt about this current movement, via e-mail and/or SMS.

7. Click –

'eSign & Send' –	To digitally sign and send using AADHAR based eSign services.
	Or
'DSC Sign & Send' –	To digitally sign and send using eToken.
	Or
'Send' –	To send the receipt without signing digitally.

   (Refer steps below for **'eSign& Send'** and **'DSC Sign & Send'**)

OTP based 'eSign & Send'

1. Click **'eSign'** and choose option **'with OTP'**.

2. Read and agree to the 'Consent for Authentication form' to proceed and then you are redirected to the eSign service portal.

3. Enter your Aadhaar Number/Virtual ID and Click **'Get OTP'**.

4. Enter the **OTP** received on the **registered** (with AADHAR) **mobile number**.

5. Click **'Submit'** to **eSign and Send**.

Fingerprint based 'eSign & Send'

1. Click **'eSign'** and choose option **'with 'Fingerprint'**.

2. Read and agree to the 'Consent for Authentication form' to proceed and then you are redirected to the eSign service portal.

3. Enter your Aadhaar Number/Virtual ID and Click '**Discover Biometric Device'**.

4. Select the **Fingerprint scanner** from the discovered connected device(s).

5. Click **'Capture'** to capture the fingerprint.

6. Click '**Submit**' after successfully capturing the fingerprint to eSign and Send.

DSC Sign and Send

1. Click **'DSC Sign & Send'**. (*May ensure, your eToken is registered with the application and plugged in the system*)

2. Enter the **PIN** for **DSC**.

3. Click login to Sign and Send.

KEY POINTS:

- **Inter Department Receipt Movement** - Receipt can be forwarded to users of other departments by choosing department from Organization hierarchy list and then users, in case for single instance multiple departments. By default, self-department is selected. (*Configuration based feature*).

- **Ease in Forwarding** – Provision of segregated send 'To' and 'CC' employee list to choose from, based on –

  a) **Recent 5** – List of last five employees/users to whom receipts have been forwarded

  b) **In Channel** – List of employees already in channel of submission/movement of the receipt.

  c) **Sub-ordinates** – List of employees directly reporting to the user who is forwarding the receipt.

  d) **Send Back** – Auto populating the name of the employee from whom the receipt was received.

  e) **Reporting Officer** – Auto populating the user's reporting officer name.

  f) **Group** – Adding all or selective users from a group of employees already created by the user who has forwarded. This is visible/can be used only for **'CC'**, since receipt can be forwarded to only one user in **'To'**.

- **Intimate To** – This allows user to intimate all or selective employees/users already in channel of submission/movement of the receipt, about the current forwarding movement. This can be done via SMS and e-mail.

Note:

- The **copy (CC)** of the receipt number generated is on the following pattern: **Sequence Number (Copy number)/Year/Section-Code**. For example, 101(2)/2020/Parliament Section.

Sequence number - 101
Copy number   - 2
Year of Creation   - 2020
Section/Office   - Parliament Section