SOP for LMS SFTP and Document Upload in Customer Portal

✓ Standard Operating Procedure for placing the files in SFTP Path under LMS Lead Management System and downloading the Proposal Forms with KYCs by Customers in Customer Portal under Document Upload functionality.

✓ Above 2 functionalities were deployed CIS on 20.02.21.

1. Install WinSCP software on your desktop. If this software is not available with CPC, kindly contact System Administrator or RICT SPOC for getting this software installed as this software is being used for taking device logs etc..

2. After installing the WinSCP software, open the same. Screen will look like as below:
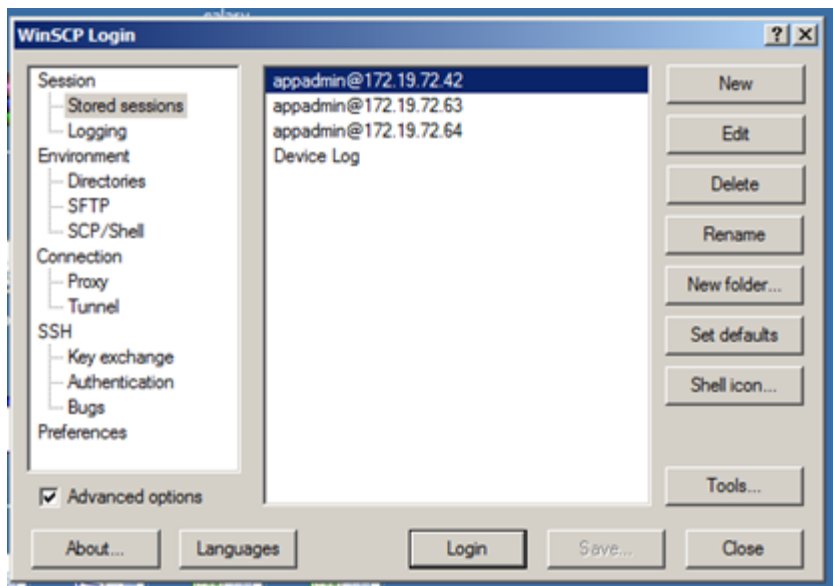
3. Click on New

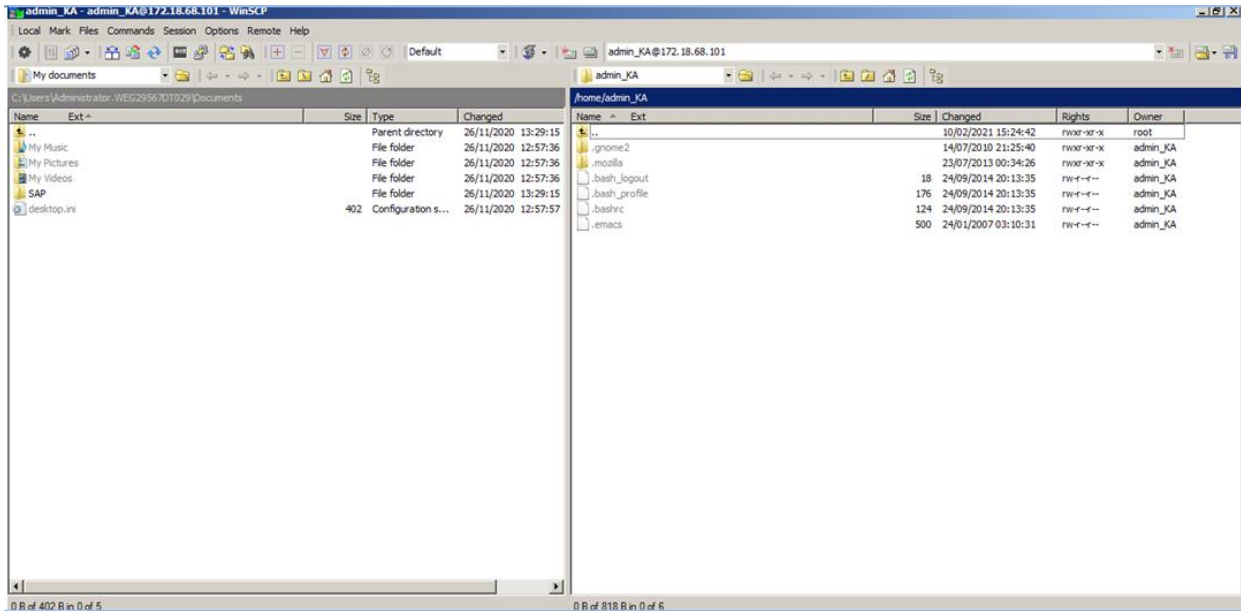4. In the next screen, enter the host name, port as shown below:
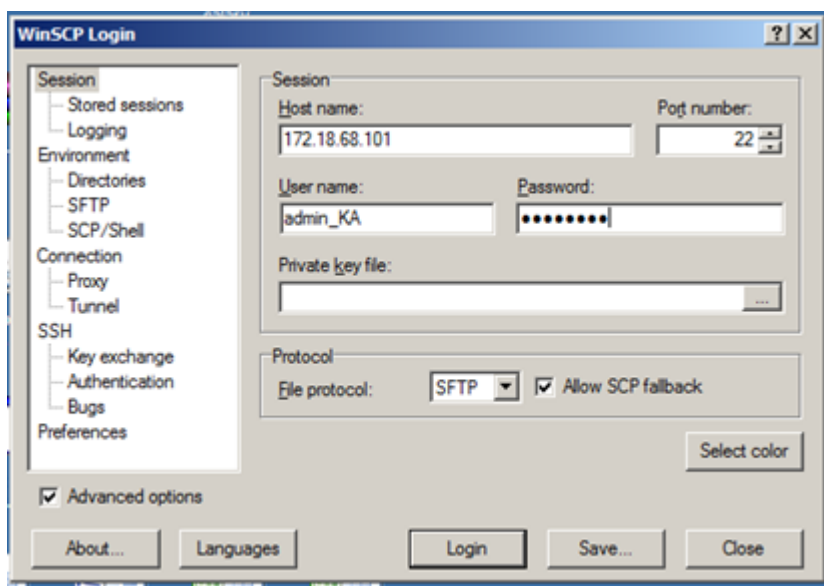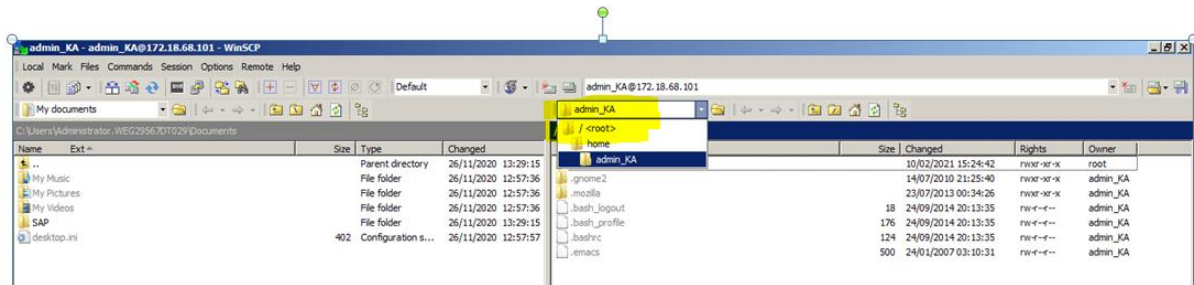

Host name: 172.18.68.101
Port number : 22
Username and Password will be shared to all Circles SPOCs in separate mail.
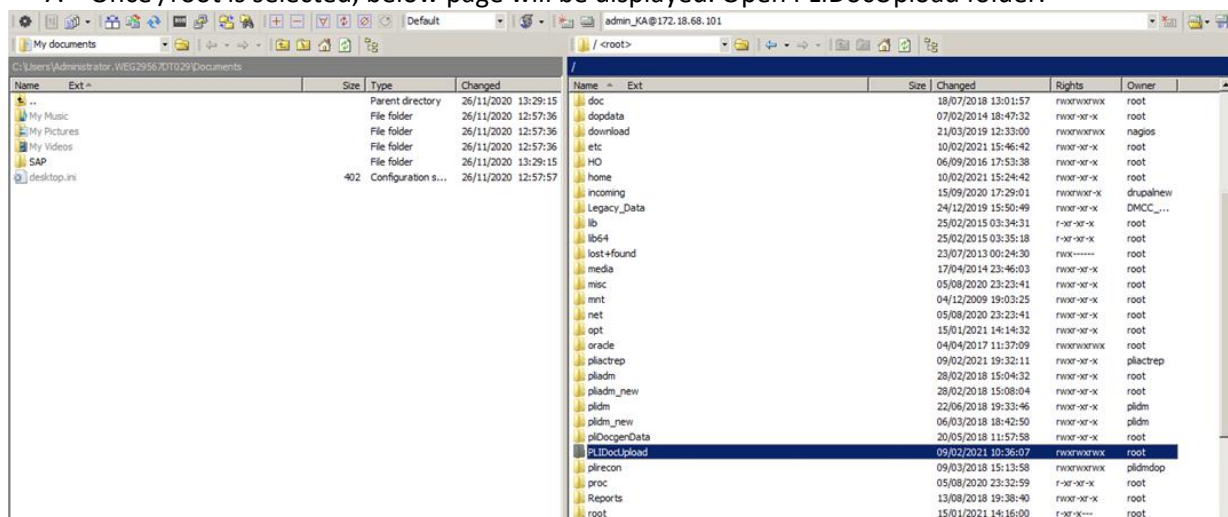
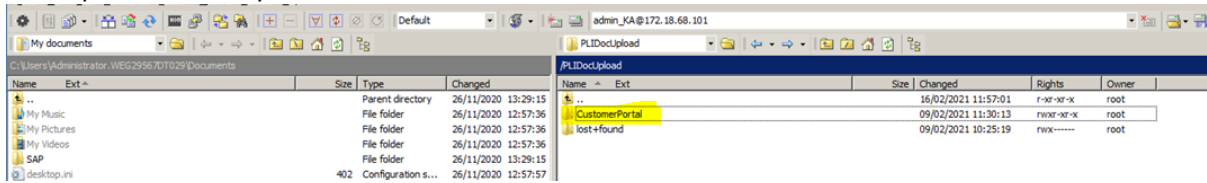5. After successful login, screen will appear like below:

6. Select /root as highlighted in below image from the dropdown:

7. Once /root is selected, below page will be displayed. Open PLIDocUpload folder:

8. Open Customer portal folder as shown below:

9. In the next screen, LMS and proposaldoc folders will be available. If CPC wants to place bulk lead creation template in the SFTP, then open LMS folder. If CPC wants to see the documents uploaded by customer in online, then open proposaldoc folder depending on the requirement
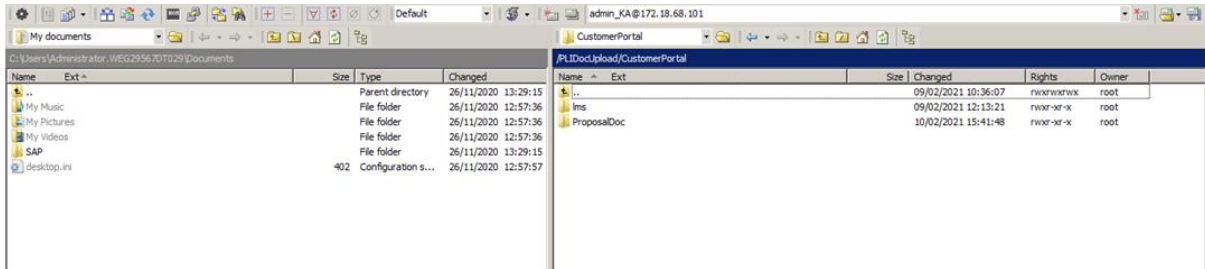
10. In each LMS and proposal doc folders, separate folders are created for each circles.
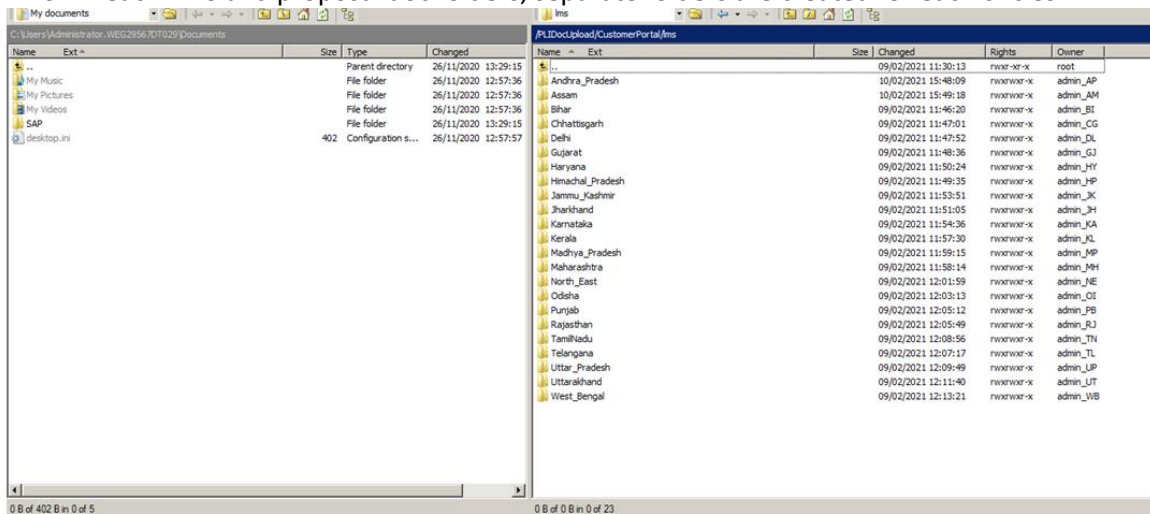
11. To place LMS bulk lead creation template file, open the circle folder (circle to which CPC is belonging to) and place a template file.

12. To download documents uploaded by customer in online, then open proposaldoc folder, then open circle folder. Within circle folders, new folders will be available based on the pincode of the CPC. On opening these pincode folders, date wise folders will be seen on which customer has uploaded the documents. In the date wise folder, a single file in pdf format is available (documents uploaded by customer). CPC can download this pdf file for further processing like ECMS upload or alternate utility upload etc.

13. Files present in the SFTP path will be deleted after 30 days, so CPC has to make sure that if any files are present within their pincode folder, then it has to be downloaded within 30 days from the date of creation of the file. CPCs are suggested to check folders on daily basis so that delays can be avoided.

** End **