Portal Readiness Status

Portal Live for

Public Corporates Investors
Private Corporate Investors

Portal Under Development for

Partnership Firms
Societies
Sole Proprietorships
Trust and HUF
Key Information & Features

❖ Complete web based Online Portal with Self-Service options

❖ Key Features:
  ➢ Completely Paperless And Digital
  ➢ Secured & Simple Workflow With Initiator & Approver Model
  ➢ User Defined Checker Levels
  ➢ Corporate Parent-Child Concept
  ➢ Multi Transactions At Single Click
  ➢ Multi Payments Option
  ➢ Single Login for Multiple Folios
  ➢ SMS/Email Approval And Notifications
  ➢ Web & Customized Connectivity (based on Corporate requirements)
  ➢ Portfolio And Transaction History Tab
  ➢ Transactions Basket
  ➢ 24*7 Access to Portfolio
  ➢ Quick On-boarding For Corporates Who Has PAN Complaint & Already Transacting *

*If the corporate has transacted in any of the AMC/RTA Platform
Module Details

**Convenience**
- Paperless transactions
- Single login for multiple Folios
- SMS/Email Approval

**Product**
- 24/7 Access to the Portfolio
- New Features Updates
- Single view for all the transaction

**Key Features**
- Access to Portfolio view *
- Transactions Details / Reports / Basket
- Corporate Parent – Child concept
- Web and API connectivity

**Pricing**
- NO Administrative Cost
- Nil Set-up Cost

* Upcoming Feature
## Corporate Registration Process

### One Time Online Registration
- Registration with registered Email ID and PAN number
- Mapping of Existing Funds with Folios*
- Authenticated by Authorized / Approved Signatory

### Supporting Documents
- Authorized Signatory List
- Board Resolution

### Role Mapping: User Type
- **Role 1:** Viewer/Initiator  
  - **Scope:**  
    - a. View Transactions  
    - b. Manage Transaction Process and Follow-up
  - **Number Of Users:** Single or Multiple (Max 5)
- **Role 2:** Approver  
  - **Scope:** Authorized signatory of corporate  
  - **Number Of Users:** Single or Multiple (Max 5)

*Upcoming feature
Initiating Transaction
- Initiator logs on to website.
- Selects Folio to initiate transaction.
- Transaction type & details is initiated.
- Prefilled form is auto generated.
- Initiator submits the transaction.

Approval Process
- Authorizers receive instant alerts via Email & SMS.
- Authorizer approves/rejects transaction.
- Alerts are triggered for other Approvers.
- Upon required approvals transaction is reported.

Settlement
- For Purchases: Credit And Transaction Reporting decide the Applicable Cut-off Date.
- Other Than Purchases: Transactions are Settled as per Transaction Reported Time.
- Dual Options (Clearing Corporation & AMC Account) are Available - For Fund Movement.

Client Services
- Transaction Live Status Available.
- * Retriggers approval of Email & SMS Alert.
- Download transaction report(pdf & xml.)

*Upcoming feature
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