DIGI KYC - Unified On-boarding Assisted Journey

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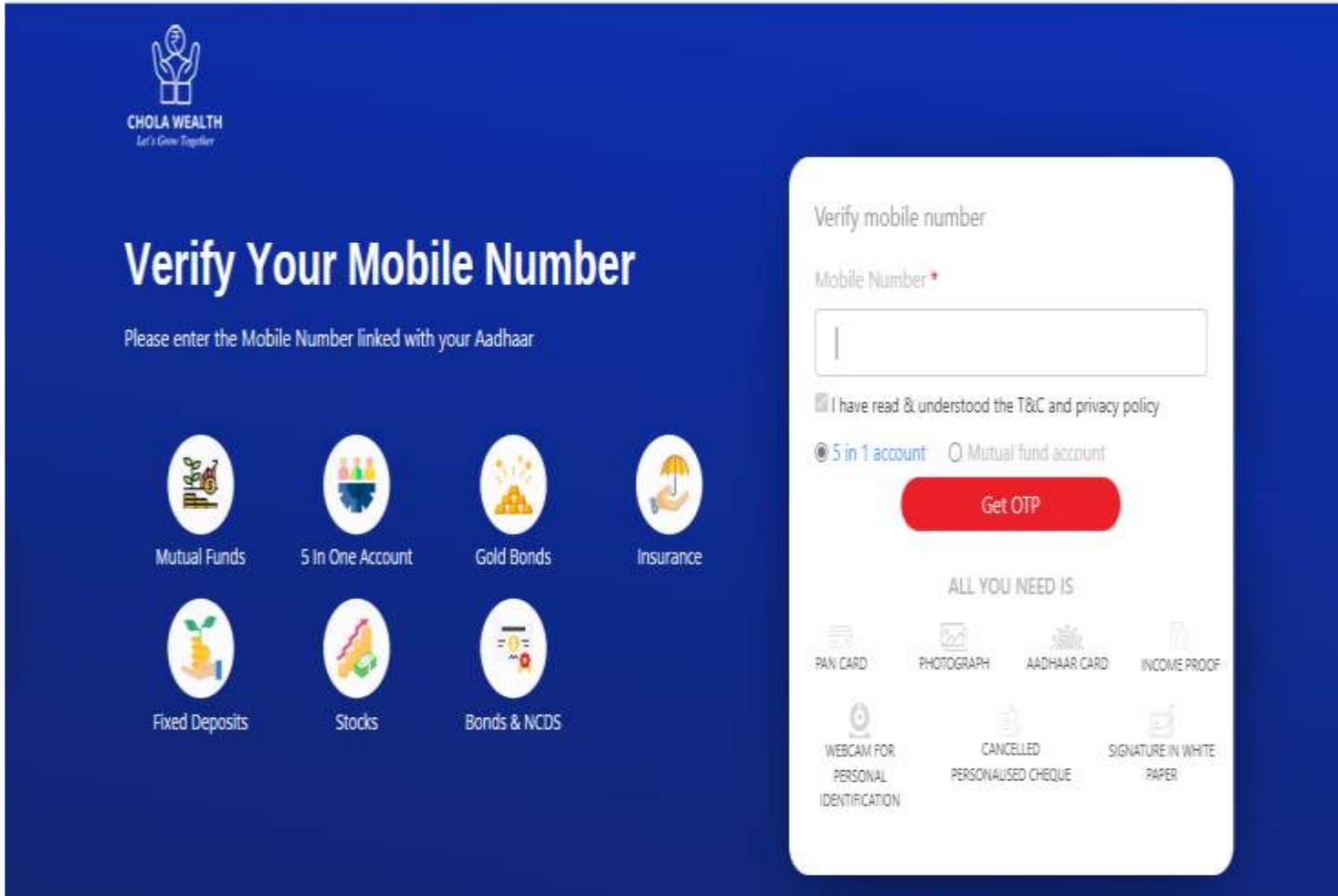
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❖ Prerequisite

- ❖ Use only Latest version of Chrome / Firefox/ Safari browser

- ❖ Please ensure, mobile number is linked with Aadhar to proceed for e-Sign and Instant Account opening.

- ❖ Keep the documents / proofs ready before starting the account opening process (PAN image, signature image, Bank account proof, income proof for F&O

❖ Important Instructions

- ❖ Kindly enable or give permission to camera , mic, location, Popup

- ❖ While taking live photo ensure the actual person is in front of the camera (do not show a photo of the person)

- ❖ While taking live photo ensure only the Applicant/KYC person alone is in front of the camera with plain background and ensure no other person is in the background – This is important as liveliness is getting checked in this

- ❖ While taking live photo, kindly follow the instruction on the screen (place the face in the circle, avoid glaring light hitting the camera)

- ❖ Please go through the process manual of every steps for better understanding.

- ❖ Please do not click back / refresh key during the process And use only the existing URL link for reprocess, In-case if the system through any error / version timed during process.

  To check your Email/ Mobile link Aadhaar – https://resident.uidai.gov.in/verify-email-mobile

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- **On the landing page, you will have to type in customer mobile number and select either:**
  - **5-in-1 account**
  - **Mutual Funds Account**
- **Finally you must select, Get OTP.**

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- **You must then type in the OTP sent to the mobile number.**
- **After typing the OTP, screen will auto verify and move to next step**
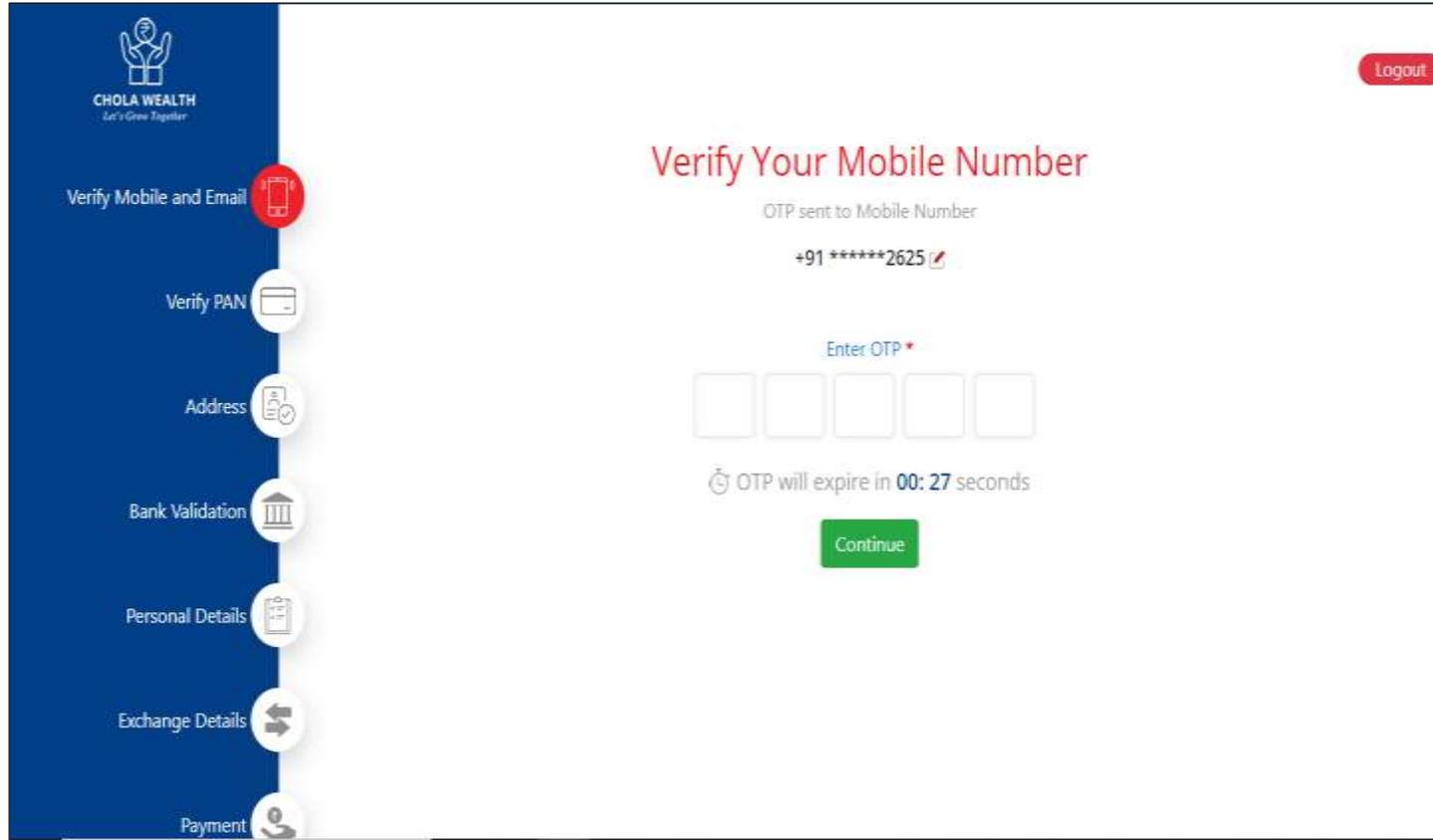
- **You must then type in your Full name and your Email ID**
- **Then you must select, Get OTP**

- **You must then type the OTP sent to your mobile number.**
- **Then screen will auto verify and move to next step"**
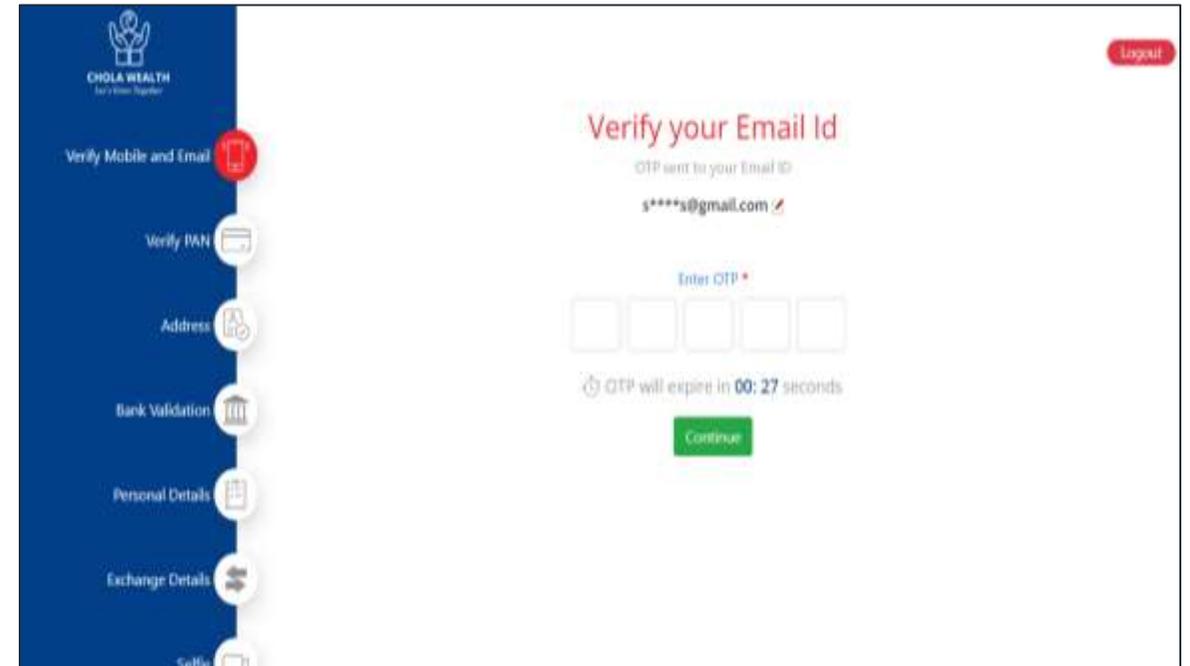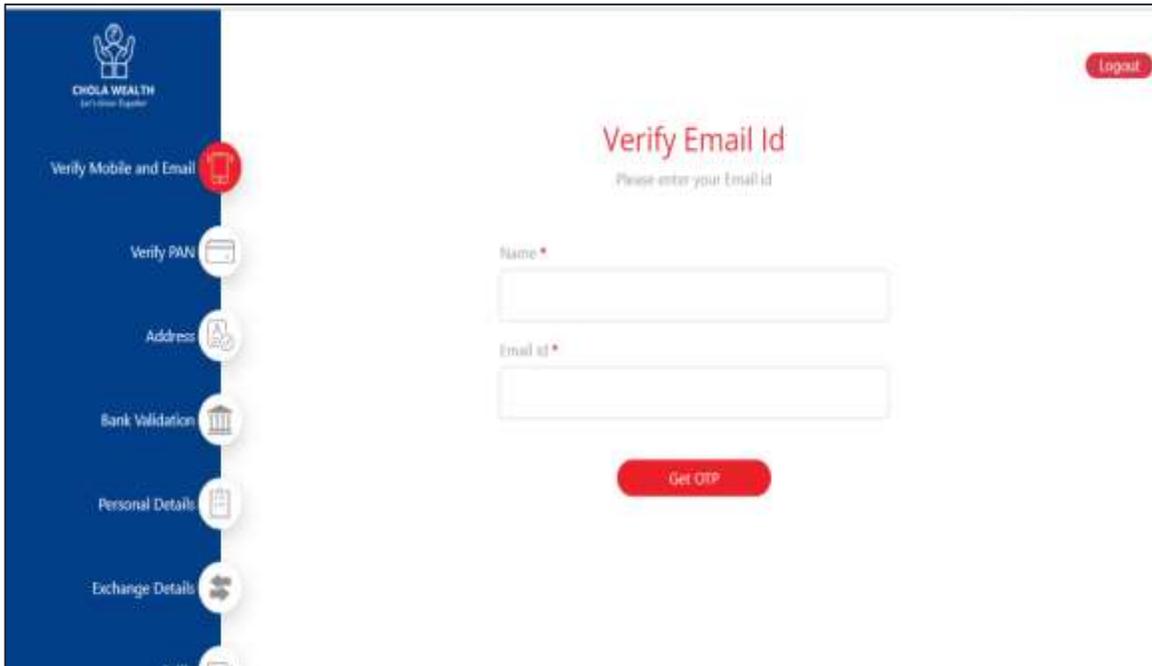
- **You must then type your:**
  - **PAN Card Number**
  - **Date of Birth**

You must then upload a photo of your PAN Card and click "continue"

PAN image display in screen, crop PAN full image & save

- **Primary will be KRA option for KRA registered clients & Other mode to fetch address details is through DigiLocker.**
- **For DIGI Locker, your mobile number must be linked to your address proof.**
- **In such a case, you can select the checkbox providing authorization to fetch documents from Digi-Locker.**
- **Then click "Proceed to KYC"**

  - **Manually Enter Address details with address proof upload option**

- **A security code will be sent to the mobile number to authenticate the same.**
- **You must click "continue" to obtain security code.**

You must then type the security code sent to the mobile number and click "submit"
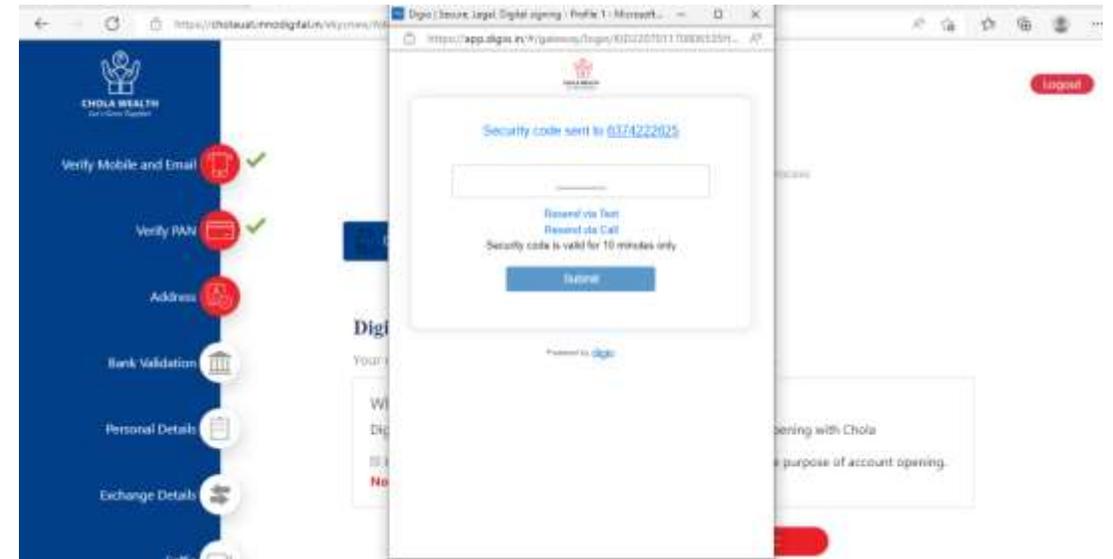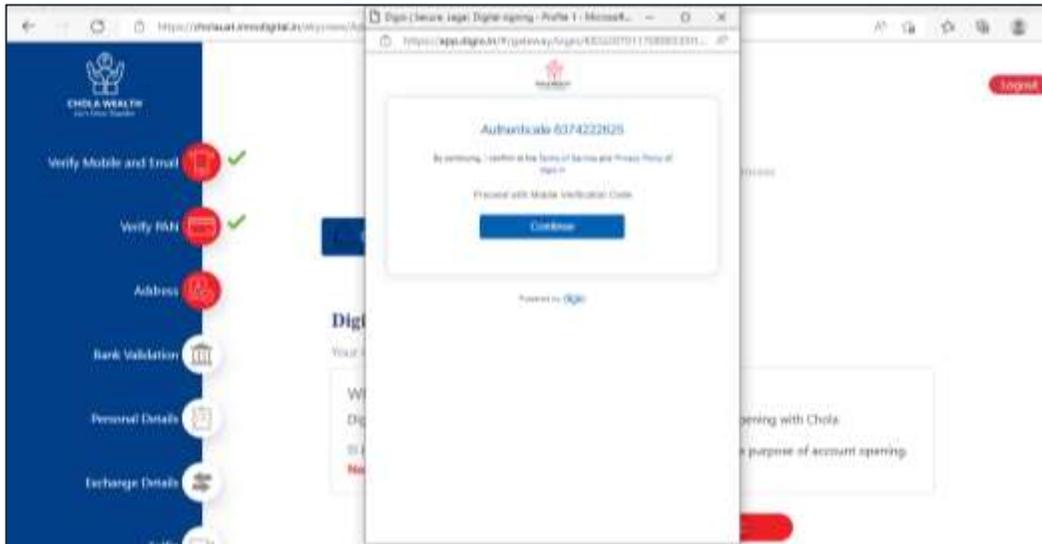
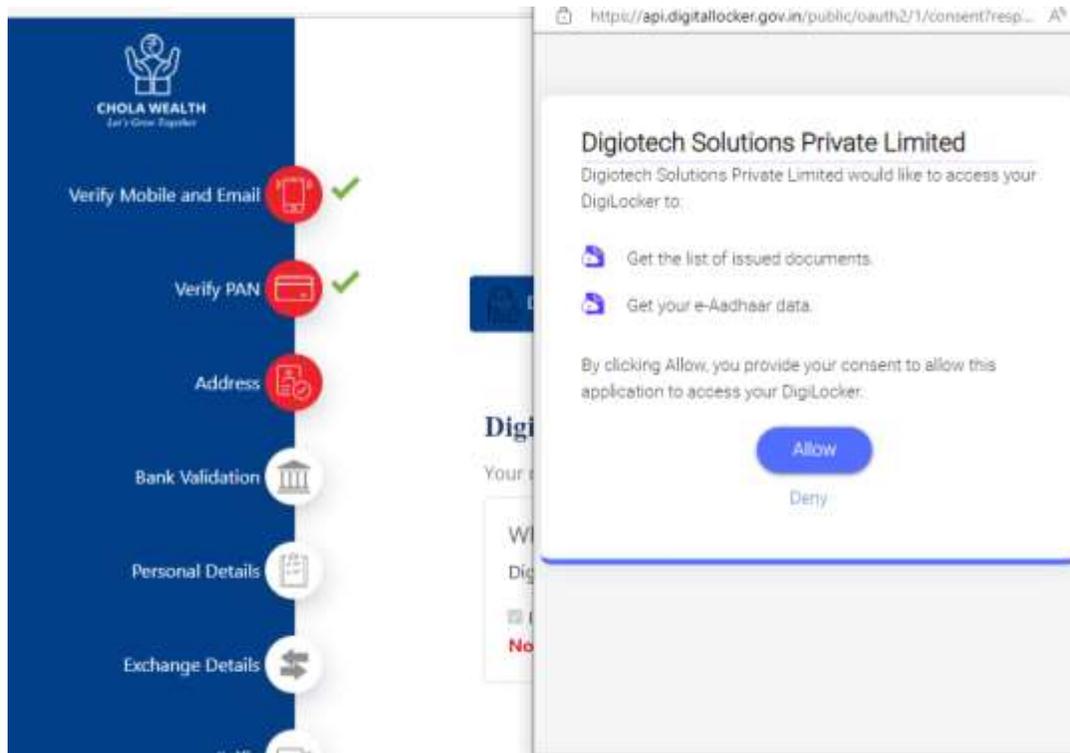**You must then select Authenticate Aadhar to fetch Aadhar from DigiLocker**

You must then type your Aadhar Number and click "next"

You must then type the OTP sent to your mobile number and click "continue

**You must then select allow to fetch Aadhar data from DigiLocker.**

**A window will appear stating that the KYC process has been a success.
You will then see a pop-up stating that the address details have been saved successfully.**

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Enter bank details, select bank name form drop down,
enter IFSC code, account number and click on save to verify , if bank details verified no need to upload bankproof image, for not verified Bank proof is mandatory

- **You will then get a confirmation that the bank proof has been successfully uploaded.**
- **You must cross verify bank details then select "Save Bank Details"**

You will then land on a screen stating that the bank details have been saved successfully.

- **You will then be requested to fill your personal details like your trading experience, income, occupation, father/spouse's name, marital status, gender etc.**
- **Then you must provide your declaration for the correctness of the information furnished and then you must click "save"**

You will then get a screen stating that the profile details have been saved successfully.

You will then be asked if you would like to add a nominee.
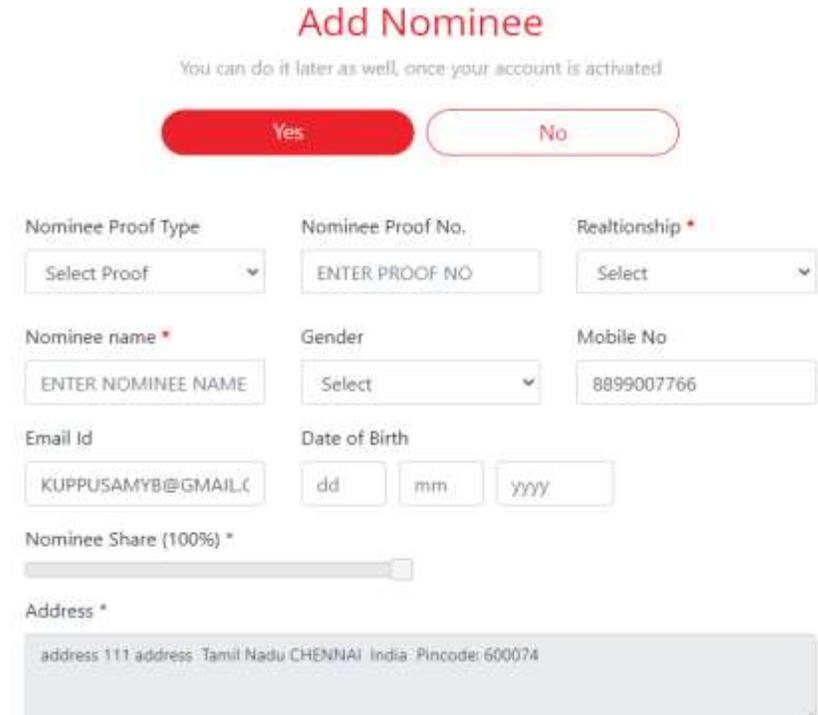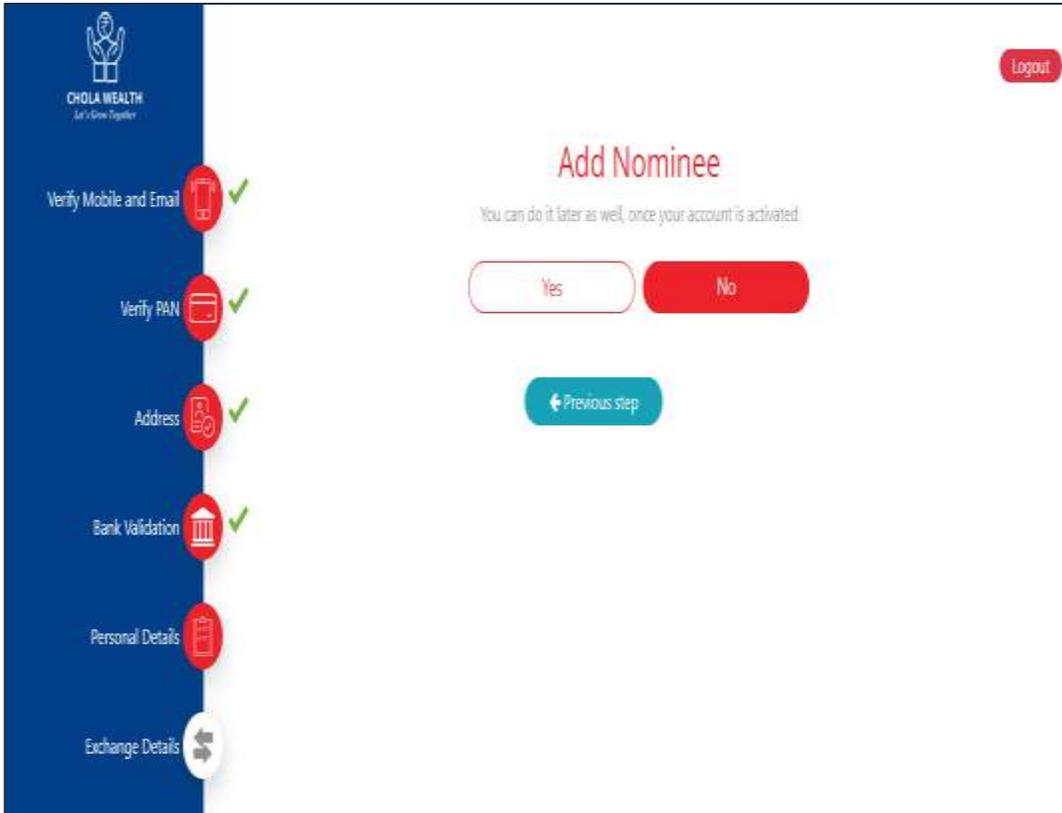
You will then see a screen confirming that the nominee details have been saved successfully.

You must then upload a file containing your digital signature.

You will then get a confirmation that the signature has been uploaded. You must then select "continue"
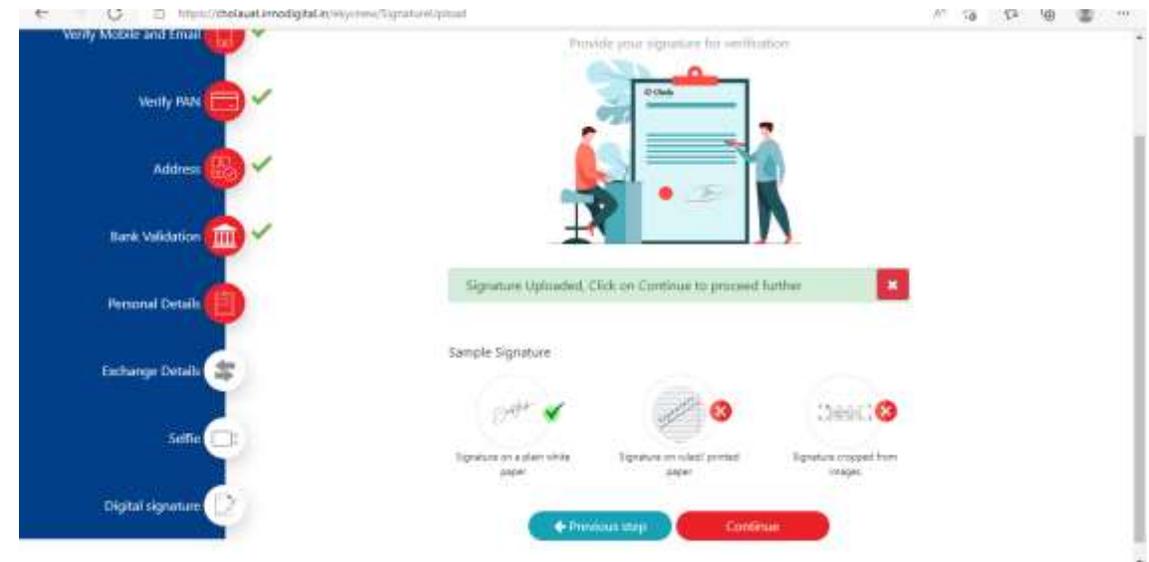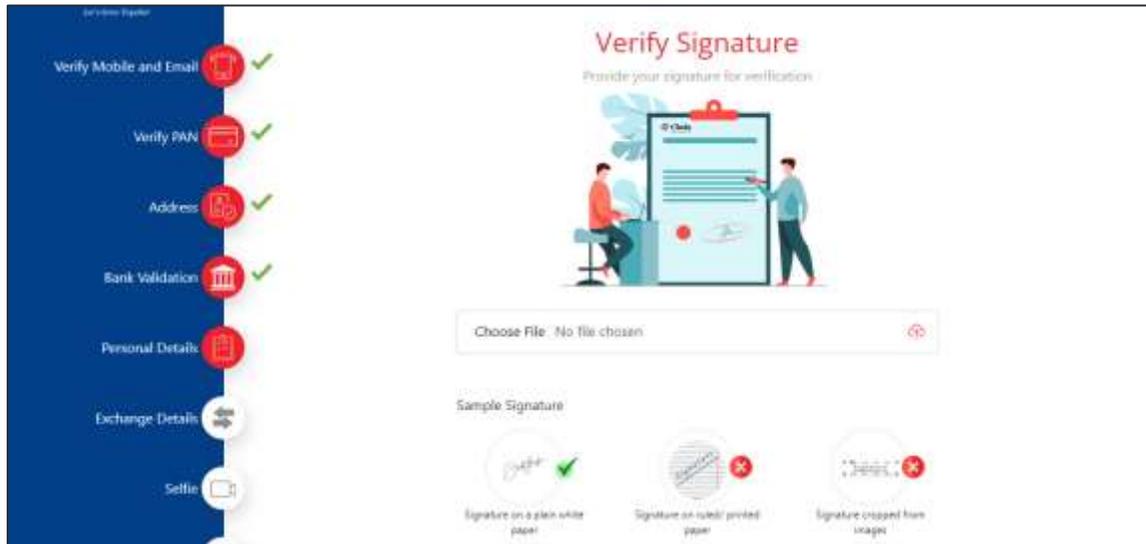
You will get a pop-up stating that the signature has been uploaded successfully.

- **You must then select the segment you would like to engage with in the exchange of your choice.**
- **Then, you must provide your declaration for the same.**
- **You must then select a DP scheme (Normal Scheme or Security Deposit Scheme) to view DP tariff**
- **You must then select "save and proceed to next"**

You will then get a screen stating that the exchange details have been saved successfully.

- **You will then be asked to click a selfie for verification purposes.**
- **For this you must have front camera/webcam and you must allow access to take a picture.**
- **Select "Open Camera"**
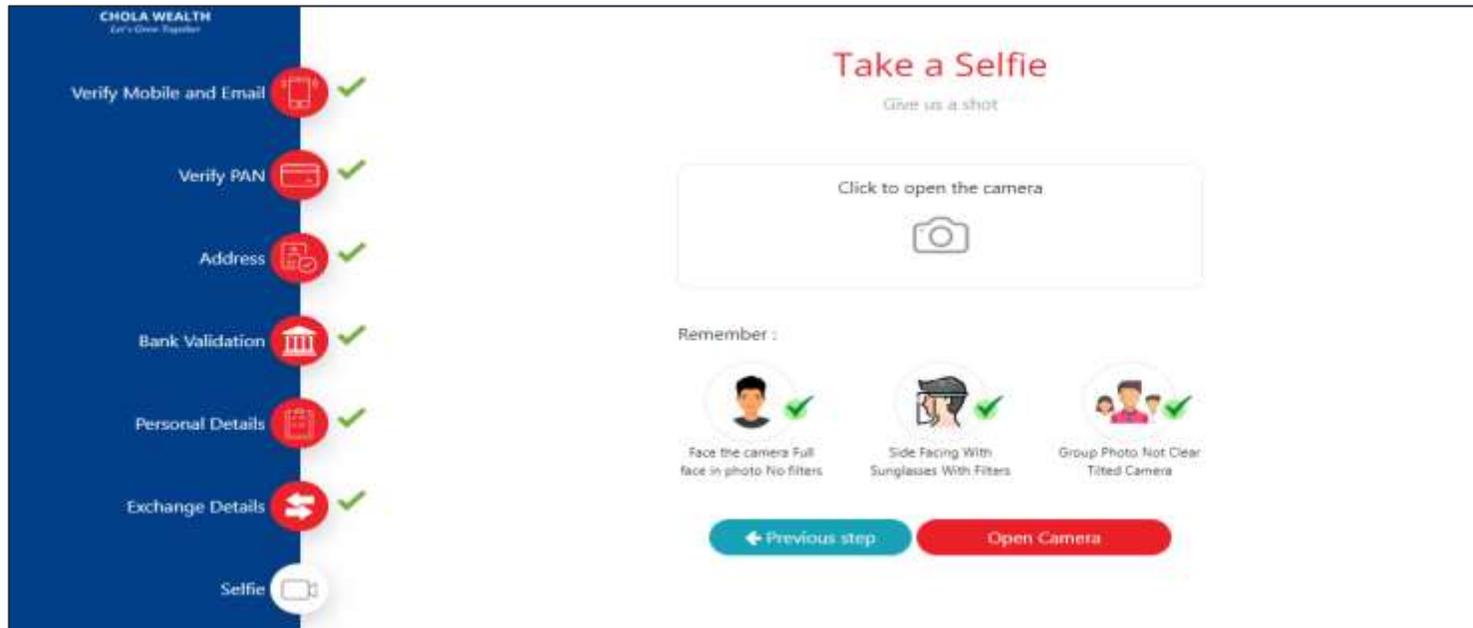
Pls ensure your phone setting is compatible to access Camera / Location & Microphone before recording IPV video.

Step 1

Step 2

Step 3

Step 4

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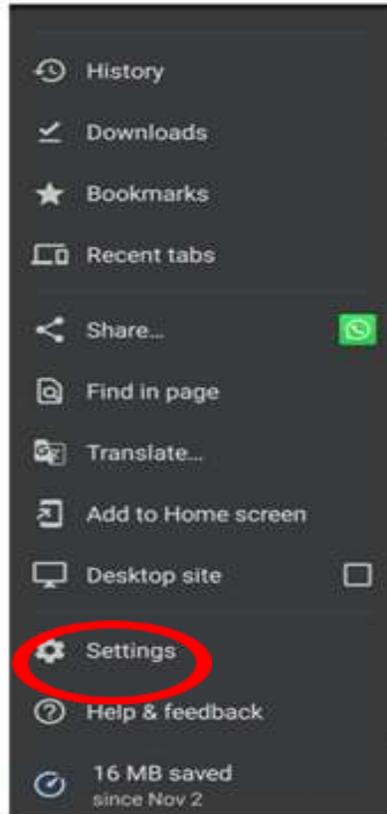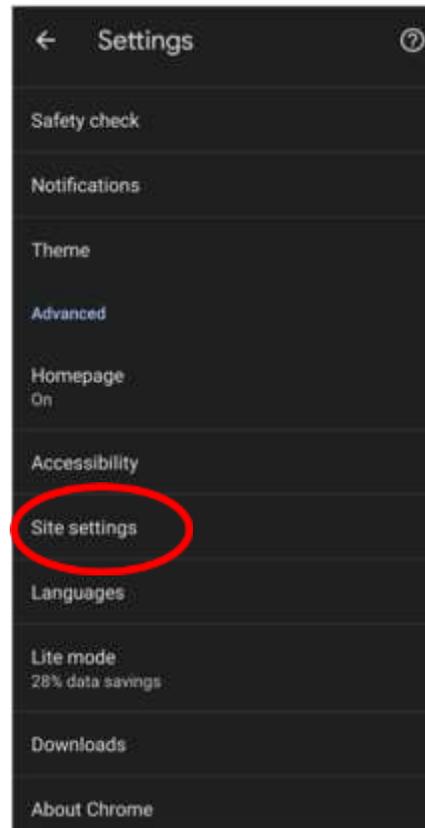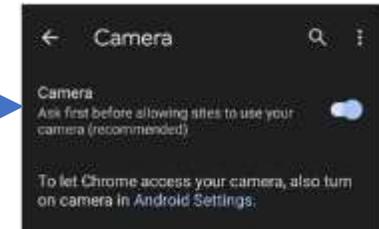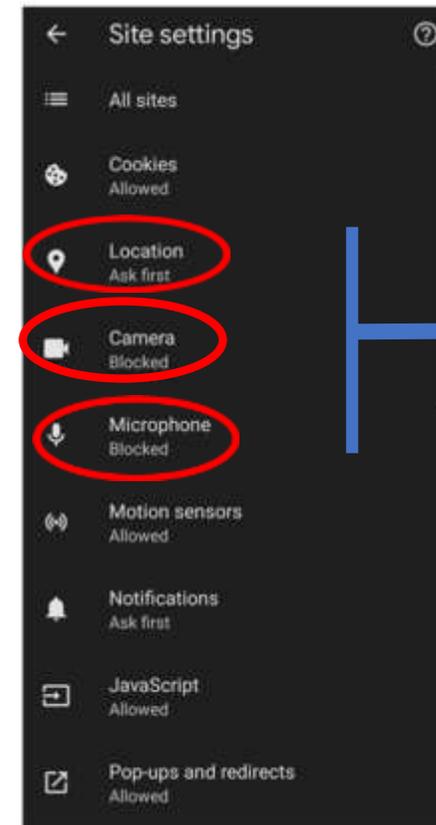
System displayed the photo image with the pop-up message whether the captured is accepted or to be recapture. You can see there will be Green blink with Tick mark which confirms the image is Accepted. In-case if the image is not properly captured then there will be a red blink were you will have to recapture the image.

Click on save details once the image is properly captured.

Video KYC verification

Hi YUVARAJ, we have captured your images successfully and we are good to go, please click on "Save Details" to proceed further. In case you are not satisfied with the picture please click on re-capture button to re-capture your photo.

Photo

← Previous step   ⏺ Re-capture   💾 Save details

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- ❖ **Application PDF will be generated which you can verify it and downloaded if required.**
- ❖ **Edit Application - Incase if customer request for any modification then click on edit application and proceed.**

Tick on check box "I hereby authorize NSDL e-Governance Infrastructure Limited (NSDL e-Gov) to -"
Enter Aadhar Number and click on send OTP - this option will be enabled only when the above check box is ticked.

Client receives OTP from Adhar. Enter the OTP and click verify OTP

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Verify Mobile and Email ✔

Verify PAN ✔

Address ✔

Bank Validation ✔

Personal Details ✔

Exchange Details ✔

Congratulation KUPPUSAMY!

Your account has been submitted successfully

For transactions or any queries, Please contact your
Relationship Manager or contact Customer Care at
1800-425-4477 or email to

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Thank You