

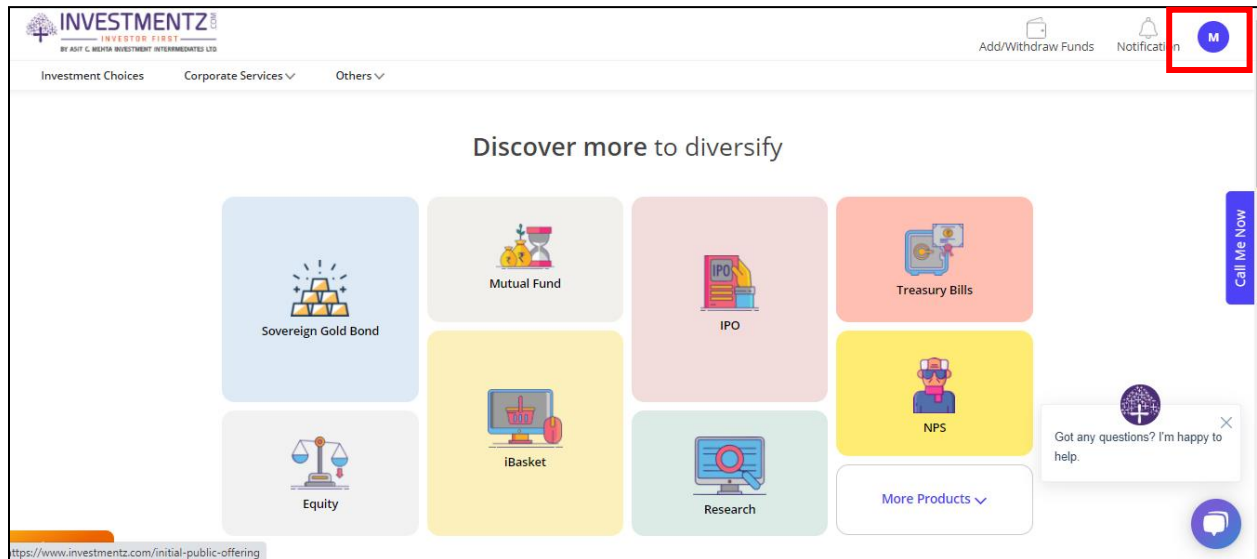


Investmentz E-mandate User Guide

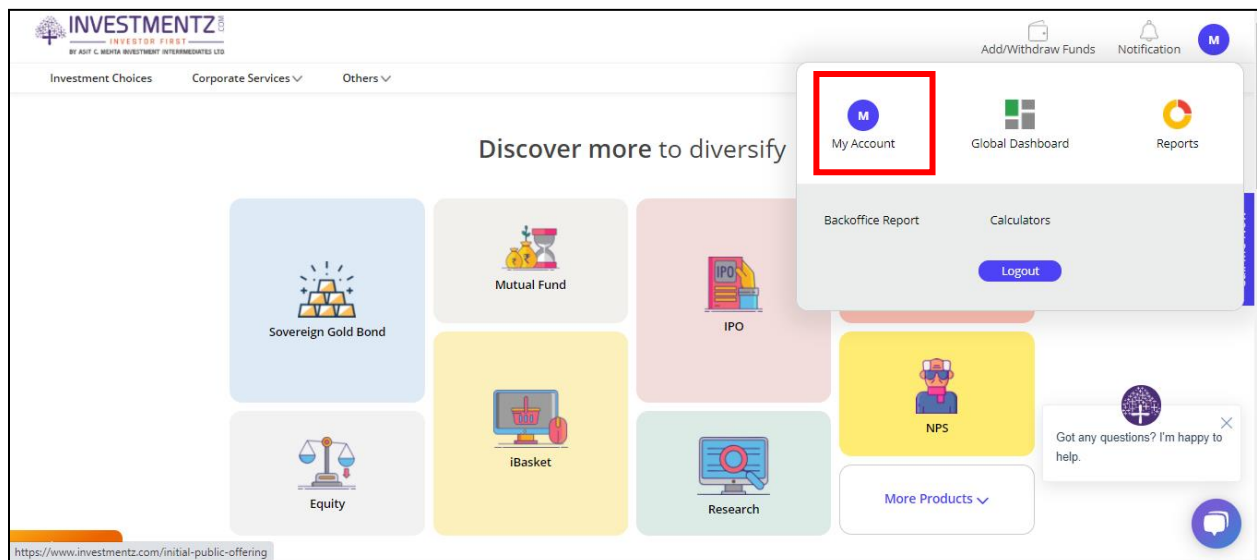
E-mandate Registration Process –

Any client who want to register for E-mandate, he/ she has to follow below process.

1. Login into **Investmentz.com** website



2. Click on **profile icon** and go to **My account**



3. Once client profile will open go to **Bank and DP** tab

The screenshot shows the 'INVESTMENTZ' client profile page. The 'BANK & DP' tab is highlighted with a red box. The page is divided into several sections:

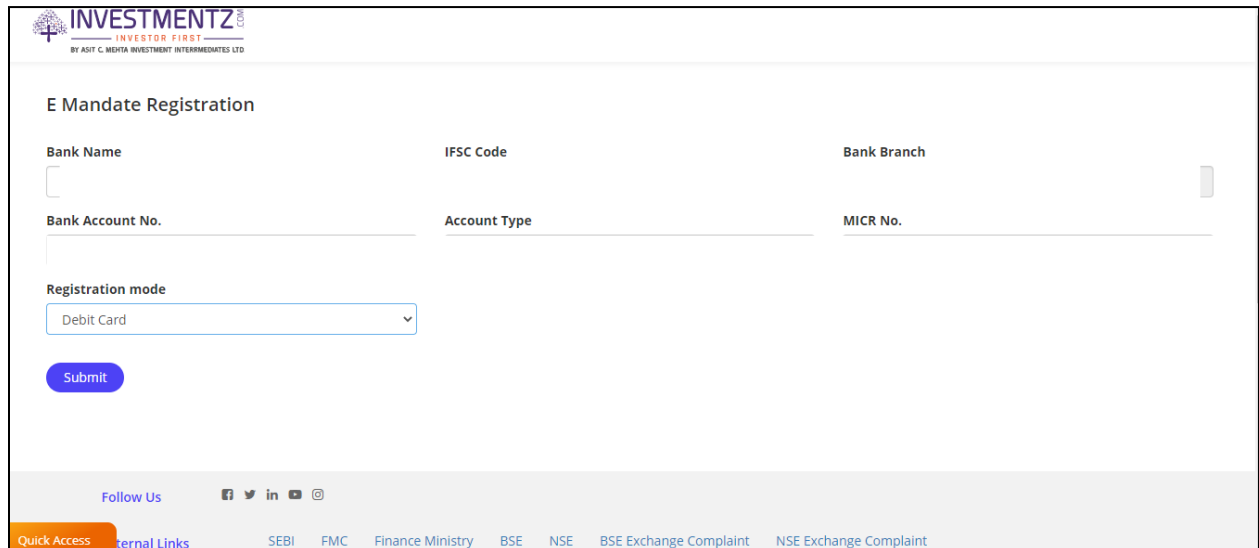
- DP DETAILS:** Includes buttons for 'ACMIIL DP', 'Other DP', 'Add DP', and 'New DP'. Below these are fields for Account Status, Account Type, Preferred Client ID, Email ID, Mobile No., and Account Opening Date.
- FIRST HOLDER:** Fields for Client Name, Father/Husband, and POA Status.
- ADDRESS:** Fields for Permanent Address and Correspondence Address, both showing '396140 Gujarat India'. An 'EDIT' button is present.
- UPI ID Details:** A dropdown menu showing 'test@test' and an 'Add' button.
- TRADING BANK DETAILS(Default Bank):** An 'Edit' button.

4. In **bank and DP** tab, clicks on **ACMIIL Mandate** Details

The screenshot shows the 'ACMIIL MANDATE DETAILS' section of the client profile page. The 'Add Mandate' button is highlighted with a red box. The page is divided into several sections:

- SECOND HOLDER:** Fields for Client Name, Father/Husband, POA Status, Date Of Birth, and Pan No.
- THIRD HOLDER:** A dropdown menu.
- Branch:** A text input field.
- DP BANK DETAILS:** A dropdown menu.
- ACMIIL MANDATE DETAILS:** Includes an 'Add Mandate' button, a 'Mandate Status' dropdown set to 'ACTIVE', a 'Bank Name' dropdown set to '---Select---', and fields for Account No, Mandate Type, Mandate Amount, and E-STATEMENT set to 'NO'.

5. If you wish to register for E-mandate then click on **Add mandate**



The screenshot shows the 'E Mandate Registration' form on the INVESTMENTZ.COM website. The form includes the following fields and options:

- Bank Name:** A dropdown menu.
- IFSC Code:** A text input field.
- Bank Branch:** A text input field.
- Bank Account No.:** A text input field.
- Account Type:** A text input field.
- MICR No.:** A text input field.
- Registration mode:** A dropdown menu with 'Debit Card' selected.
- Submit:** A blue button.

At the bottom of the page, there is a footer with 'Follow Us' and social media icons, and a 'Quick Access' section with links to 'Internal Links', 'SEBI', 'FMC', 'Finance Ministry', 'BSE', 'NSE', 'BSE Exchange Complaint', and 'NSE Exchange Complaint'.


6. Above page will open once you click on Add Mandate button, In bank name list of banks will appear which are registered in account (default bank as well as additional bank will be available)
7. From that list you can select one bank, to registered mandate.
8. In registration mode you will have an payment option of Debit card and net banking (default option will be debit card).

Please Wait
while you are
being
redirected...

Disclaimer

- One time mandate registration charges will be applicable at your bank as per the latest schedule of charges
- Registration of this mandate will authorise the user entity/ corporate/ service provider to debit your account based on the instructions provided
- You are authorised to cancel/ amend this mandate at any given point of time by appropriately communicating the cancellation/ amendment request to the user entity/ corporate/ service provider or the bank

9. once you submit then it will redirect to **NPCI** and then ask for your personal credentials



e-Mandate - Mandate Registration Form

TimeLeft	
07m : 39s	
Mandate Request initiating party name	Category Description
Asit C Mehta Investment Interrmediates	Mutual Fund Payment
Customer Name	Customer Telephone number
[Input Field]	[Input Field]
Mobile number	Email-id
[Input Field]	[Input Field]
Customer's Bank	
HDFC BANK LTD	
Debit Account number	Mandate Amount (Max)
[Input Field]	₹ 100000.00
Debit Frequency	Start Date (YYYY-MM-DD)
Adhoc	2021-06-08

10. after completing registration process response page of **NPCI** you will see and final status on registration page.



The screenshot displays the logo for INVESTMENTZ.COM, featuring a stylized tree icon and the tagline "INVESTOR FIRST" above "BY ASIT C. MEHTA INVESTMENT INTERMEDIATES LTD". Below the logo, a green heading reads "Emandate Registration is Successful!". Underneath this heading is a table with five rows, each containing a label and a corresponding empty input field.

Customer Name	
Bank Name	
Mandate Start Date	
Transaction Ref. No.	
Transaction Message	