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Account Opening
Process

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Client Registration

PAN Number *

Birth Date (DD-MM-YYYY) *

First Name as Per Pan *

Middle Name as Per Pan

Last Name as Per Pan *

☑ If you have a Branch or Group Code?

◉ Branch ◯ Remiser

User Name

password

VALIDATE

► First, you need to provide your PAN number which is a unique identifier.

► Then, input your birth date as per you PAN.

► Fill in your full name, including your first, middle, and last name, exactly as it appears in your PAN

► You'll see an option to choose either a branch or group code. Tick the appropriate option based on your preference.

► After validating all the details click on OPEN AN ACCOUNT.

► If the PAN is already exist than RESUME your application by filling PAN number , Username and Password.

KRA CONFIRM \ MODIFY

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Pan and KRA Details

Pan Number	Date Of Birth (DD-MM-YYYY) 16-04-1979	KRA Name
First Name As Per PAN ___UNBHAI	Middle Name As Per PAN	Last Name As Per PAN ___NUSHALI
Gender: ● Male ○ Female	Marital Status * ▼	Father Spouse Flag * ▼
Father's First Name *	Father's Middle Name	Father's Last Name *
Mother's First Name *	Mother's Middle Name	Mother's Last Name *
Mobile Number *	Mobile OTP 00000	Mobile Relationship * ▼
Email Address *	Email OTP 00000	Email Relationship * ▼
Correspondence Address 1 *	Correspondence Address 2 *	Correspondence Address 3 *
Country *	State *	City *	Pin Code *

Correspondence Address Proof
Unique Identification Number (ADHAAR)   STD No

GENERATE OTP | **VERIFY** | **GENERATE OTP** | **VERIFY**

KRA Pogress Status

FETCHING KRA AGENCY DETAILS
✓ Check Pan Details
✓ Fetch Pan Details
✓ Fetch KRA Agency Details
✓ Fetch KRA Details

Message
KRA Details Not Found
CONTINUE

► Click the "Open an Account" button to start.

► You will see the message shown in first image and press continue.

► You'll see a page where you can confirm or modify your KRA details.

► If you want to change any details click on MODIFY button.

► After confirmation, you can't modify the details on other page.

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PERSONAL DETAILS	BANK DETAILS	MULTI HOLDER DETAILS	OTHER DETAILS	DOCUMENTS	NOMINATION DETAILS	PREVIEW	PLAN

Account Option *
Demat + Trading

Account Type *
INDIVIDUAL

Client Type *
INDIVIDUAL / PROPRIETOR

NRI Type

Trading Code *
ab1234

Trading Type *
WEBCLIENT

Billing Category *
Normal Clients

Client Risk Category *
LOW RISK

GST No

☑ In Person Verified

Pan and KRA Details

Pan Number
abcd1234e

Date Of Birth (DD-MM-YYYY)
16-04-1998

KRA Name

First Name As Per PAN
zsgdfg

Middle Name As Per PAN
hfgrdf

Last Name As Per PAN
erggf

dgff

Gender: ● Male ○ Female

Marital Status *
Single

Father Spouse Flag *
Father Name

Father's First Name *
shfgrt

Father's Middle Name
srtgrtggrt

Father's Last Name *
sgfgtrt

Mother's First Name *
srgdfgf

Mother's Middle Name
srtrtv

Mother's Last Name *
srthr

Mobile Number *
123456789

GENERATE OTP

Mobile OTP
19632

VERIFIED

Mobile Relationship *
SELF

Email Address *
ndkjshsi@gmail.com

GENERATE OTP

Email OTP
79436

VERIFIED

Email Relationship *
SELF

► **After clicking "Confirm \ Modify" you'll see this page on your screen.**

► **If you confirmed in last page you cannot change the details.**

☐ My Permanent address is same as correspondence address.

Permanent Address 1 *

Permanent Address 2 *

Permanent Address 3 *

Permanent Country *

Permanent State *

Permanent City *

Permanent Pin Code *

Permanent Address Proof
Unique Identification Number (ADHAAR)

City Birth
Select City Birth

Place Of Declaration *

Annual Income *

Occupation *

Identity Proof Details

Identity Proof
PROOF OF POSSESSION OF AADHAAR

Enter Last 4 Digits of Aadhaar *

ExpiryDate (DD-MM-YYYY)

Segment and Brokerage Details

☑ NSDL   ☑ NSE_EQ   ☑ BSE_EQ   JOBBING BRK: HHHH - JOBB (0.03 - 0.03)   DELIVERY BRK: HHH - DELI (0.30 - 0.03)

☐ NSE_FO   ☐ BSE_FO   ☐ NSE_CD   ☐ NSE_CO

☐ SLBM

NEXT

► **After completing press NEXT.**

BANK DETAILS

Add the bank details :

► After entering 2 alphabets of IFSC code press tab button and the first image will show.

► You can search \ filter the MICR code from there.

► The system will fetch the details.

► Enter the account type and number and press on "VERIFY BANK ACCOUNT DETAILS" to validate the details.

► Click on the NEXT button.

MULTI HOLDER DETAILS

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| PERSONAL DETAILS | BANK DETAILS | MULTI HOLDER DETAILS | OTHER DETAILS | DOCUMENTS | NOMINATION DETAILS | PREVIEW |

☐ I wish to add Second Holder details.

☐ I wish to add Third Holder details.

[PREVIOUS]   [NEXT]

► After validating the bank details the multi holder page will appear on the screen as per image.

► Add the holder as per your requirements.

► You can add your holders only on this page.

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| PERSONAL DETAILS | BANK DETAILS | MULTI HOLDER DETAILS | OTHER DETAILS | DOCUMENTS | NOMINATION DETAILS | PREVIEW |

Other Details

Net Worth

Net Worth Date (DD-MM-YYYY)

☐ I wish to add Trading Contact details.

PREVIOUS

NEXT

► **After the multi holder page the page of other details will appear .**

► **Fill the details as per your requirement.**

DOCUMENTS

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Upload Documents

Pan Card *

Required as an ID proof
Maximum Image Size: 100 KB.

UPLOAD

Address Proof *

Upload Aadhaar Card(original color photo)
Please remove first 8 digits of Aadhaar No.
Maximum Image Size: 100 KB.

UPLOAD

Address Proof 1

Upload Aadhaar Card(original color photo)
Please remove first 8 digits of Aadhaar No.
Maximum Image Size: 100 KB.

UPLOAD

Signature Upload *

Write down your full signature on a blank,white piece of paper.Take a close-up picture
of your signature and upload it.
Please upload signature in black and white(B/W) only.
Maximum Image Size: 25 KB.

UPLOAD

Live Photo *

Grab a quick selfie
Maximum Image Size: 50 KB.

UPLOAD

In Person Verification *

Hold the piece of paper or your mobile phone in front of the webam / upload a photo
such that the OTP and your face are clearly seen. Make sure the OTP is legible and can
be captured.
Maximum Image Size: 100 KB.

UPLOAD

Income Proof(Optional)

Mandatory to upload income proof for F&O /currency and commodity
Maximum Image Size: 200 KB.

UPLOAD

Cheque(Optional)

Mandatory to upload cheque if bank not verified by penny drop or if it is a multi holder
account
Maximum Image Size: 300 KB.

UPLOAD

Identity Proof *

Upload Identity Proof(original color photo)
Please remove first 8 digits of Aadhaar No.
Maximum Image Size: 100 KB.

UPLOAD

► **After validating the other details, page for uplaoding the documents will appear.**

► **Upload all the necessary documents as per requirement.**

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Additional Documents

Holder
First Holder ▼

Document Type
Address1 ▼

UPLOAD

ADD DOCUMENT   CLEAR

PREVIOUS

NEXT

► **You have to add documents of multi holders on this page.**

NOMINATION

Nomination Details

☑ I wish to make a first nomination

First Nomination Details

Name *	Pan Number	Date Of Birth (DD-MM-YYYY) 📅	Relation *
Phone No:	Mobile Number * 9313429	Email Address HELPDESK@SIHL.IN	☐ Minor Nominee

Percentage *   ☐ Equal Nominee Percentage Distribution?

☐ Address Same as Correspondence Address.

Address 1 *	Address 2 *	Address 3 *
Country *	State *	City *	Pin Code *

Nominee Documents

Document Type ▼	Document Proof No *	**UPLOAD**

☐ I wish to make a second nomination
☐ I wish to make a third nomination

PREVIOUS   **NEXT**

► **After the documents are uploaded the page for nomination will appear as per the image.**

► **Upload all the nomination details.**

► **After uploading the details click on NEXT button.**

PREVIEW

PERSONAL DETAILS	BANK DETAILS	MULTI HOLDER DETAILS	OTHER DETAILS	DOCUMENTS	NOMINATION DETAILS	PREVIEW	PLAN

Generate PDF

To successfully finish account opening procedure, Kindly Generate the Account Opening Form and Cross Check Your Details.

GENERATE PDF

PREVIOUS   **NEXT**

► **After filling nomination details the preview page will appear on your screen as per the image.**

► **Without generating the PDF you will not be able to go to the next page.**

► **After generating PDF press on NEXT button.**

PLAN

| PERSONAL DETAILS | BANK DETAILS | MULTI HOLDER DETAILS | OTHER DETAILS | DOCUMENTS | NOMINATION DETAILS | PREVIEW | PLAN |

LIMITED PERIOD OFFER

Free

₹ 500

₹ 0

(DDPI Charges :300)

1-Year

₹ 500

₹ 350
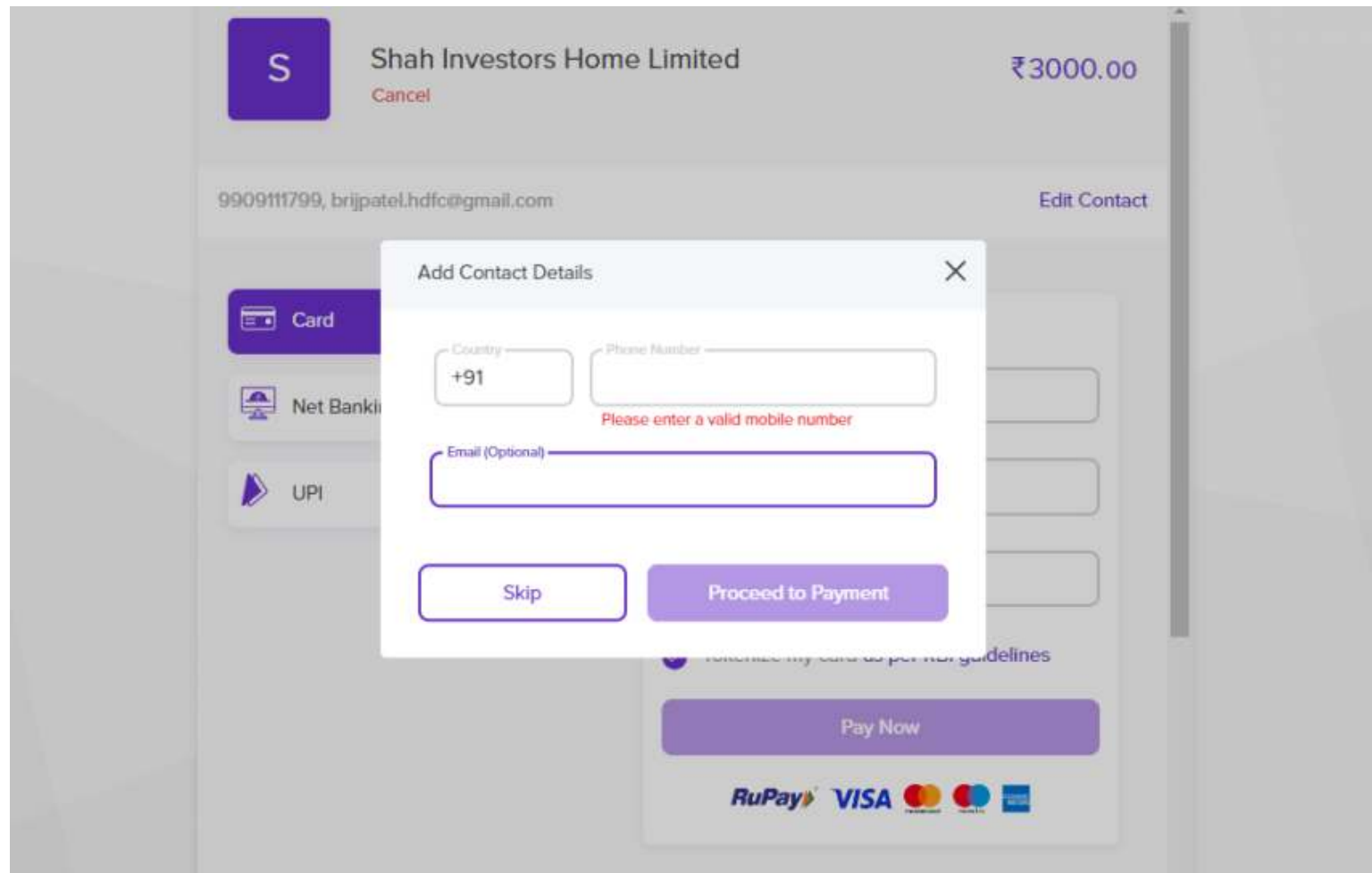
(DDPI Charges :300)

Click here to view Demat Tariff.

PREVIOUS

FINISH

▶ **After previewing all the details,the plan selection page will appear as per image.**

▶ **Select the plan as per your need.**

▶ **After selecting the plan ,the site will direct you to the banking page for making the payment of your plan.**

PAYMENT

▶ After selecting your plan. you will be directed to a page where you can choose to add your contact details.

▶ You have the option to skip this step and proceed directly to the payment for your chosen plan.

PAYMENT

► **After the contact details slide, the payment page will be displayed.Please choose the most suitable payment method.**

► **Note that credit cards are not accepted.**

PROCESS

Online CRM Payment Response

Your Request has been submitted successfully for verification.

Once Your application will be verified, you will be notified by email for digital sign.

Status :	SUCCESS
Message :	00::TRANSACTION HAS BEEN APPROVED
Form No :	
Transaction ID :	
Amount :	
Reference No :	
Payment Mode :	UPI

Kindly cross check your demat ledger entry with SIHL! If any query please contact at demat.executive2@sihl.in

▶ **The slide shown above indicates that your request for opening an account has been noted and is currently in the verification process.**

▶ **Please keep checking your registered email for further instructions.**

Online CRM Digital Sign And DDPI

Form No : ▓▓▓▓▓

Pan No : ▓▓▓▓▓▓▓

Client Name : ▓▓▓▓▓ ▓▓▓▓▓ ▓▓▓▓▓▓▓▓▓

DIGITAL SIGN FORM | **DDPI FORM**

► Once your request has been verified, you will receive an option for a digital signature on your registered email ID.

► Select this option, and as the image above shows, digital signatures are necessary for the "DDPI form" as well as the "digital signature form."

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Form No : 766212   Pan No : EXDPP4119K

Client Name : PAREKH ANKITABEN DHARMESHKUMAR

DIGITAL SIGN FORM | DDPI FORM

Success

Digital Sign Using:

◉ OTP BASED   ○ BIOMETRIC

OK   CANCEL

► From the options displayed on your screen and shown in the image above, please choose either the OTP-based or biometric method, whichever you prefer.

SHAH INVESTOR'S HOME LTD. has requested to Digitally sign the document
Transaction ID: CRM_AOF_FH_~~700212 2024053015162~~ dated 2024-05-31T11:37:27

Please click on the checkbox and enter Aadhaar/Virtual ID

☑ I hereby authorize Protean eGov Technologies Limited (formerly NSDL e-Governance Infrastructure Limited) to –

1. Use my Aadhaar / Virtual ID details (as applicable) **eSigning the digital document(s) and digital Account Opening Form(s) to open (a.) Stock Trading (b.) DEMAT, (c.) Currency, (d.) Commodity, (e.) Mutual Fund, (f.) Portfolio Management Service Account for any one or combination of these** for/with **SHAH INVESTOR'S HOME LTD.** and authenticate my identity through the Aadhaar Authentication system (Aadhaar based e-KYC services of UIDAI) in accordance with the provisions of the Aadhaar (Targeted Delivery of Financial and other Subsidies, Benefits and Services) Act, 2016 and the allied rules and regulations notified thereunder and for no other purpose.

2. Authenticate my Aadhaar / Virtual ID through OTP or Biometric for authenticating my identity through the Aadhaar Authentication system for obtaining my e-KYC through Aadhaar based e-KYC services of UIDAI and use my Photo and Demographic details (Name, Gender, Date of Birth and Address) **eSigning the digital document(s) and digital Account Opening Form(s) to open (a.) Stock Trading (b.) DEMAT, (c.) Currency, (d.) Commodity, (e.) Mutual Fund, (f.) Portfolio Management Service Account for any one or combination of these** for/with **SHAH INVESTOR'S HOME LTD.**.

3. I understand that Security and confidentiality of personal identity data provided, for the purpose of Aadhaar based authentication is ensured by Protean eGov Technologies Limited and the data will be stored by Protean eGov Technologies Limited till such time as mentioned in guidelines from UIDAI from time to time.

VID/Aadhaar: [Enter VID/Aadhaar] 👁

[SEND OTP]   [CANCEL]

NSDL e-Gov is now 🌀 protean

Click Here to generate Virtual ID. Download Instructions to generate Virtual ID in lieu of Aadhaar.

► Once you click on the OTP-based option, a screen like the one shown above will be displayed, prompting you to enter your Aadhaar number. **Note that this screen will appear twice, and you will need to enter your Aadhaar number again.**

► Click on the checkbox labelled to authorize Protean eGov Technologies, then select the "send OTP" button provided below.

► After the digital signature procedure, please make sure that you complete the DDPI form as well.

PROCESS

Success
Token: 700212.zip
Transaction ID: F963D49F5AE4CBAE7436561927BACA5
Download Signed File