



Bank Change Process

**From The Application And Web Portal
PPT Guide**

Slide 1:

Login to the Application or Web Portal



The screenshot displays the Shah Investor's Home Ltd interface. At the top, the NIFTY50 index is at 22552.10 (down -243.80) and the SENSEX index is at 74464.81 (down -846.25). The web portal dashboard includes a search bar, navigation tabs (Dashboard, Scrip Details, Trades, Portfolio, Discover, Research), and a list of holdings. A table of 'Top Gainers' is visible, listing stocks like KARNIKA, RAMANEWS, HEADSUP, ASIANENE, APOLLOPIPE, INDIANHUME, DICIND, MGEL, and PHANTOMFX with their respective prices and percentage changes.

The mobile application interface shows a navigation menu with 'Profile' selected. A settings menu is also visible, with 'Back Office' highlighted. The mobile app shows a 'Holdings' section with 'INVESTED ₹ 0' and 'OVERALL PROFIT ₹ 0 (0%)'. The bottom navigation bar includes PriceView, Trades, Portfolio, Discover, and Account.

Mobile Application: Navigate to the "Accounts" section and tap on "PROFILE". The dashboard will appear.

Web Portal: Click on your trading code at the top-right corner. A dropdown menu will appear—select "Back Office".

Slide 2: Back Office Dashboard

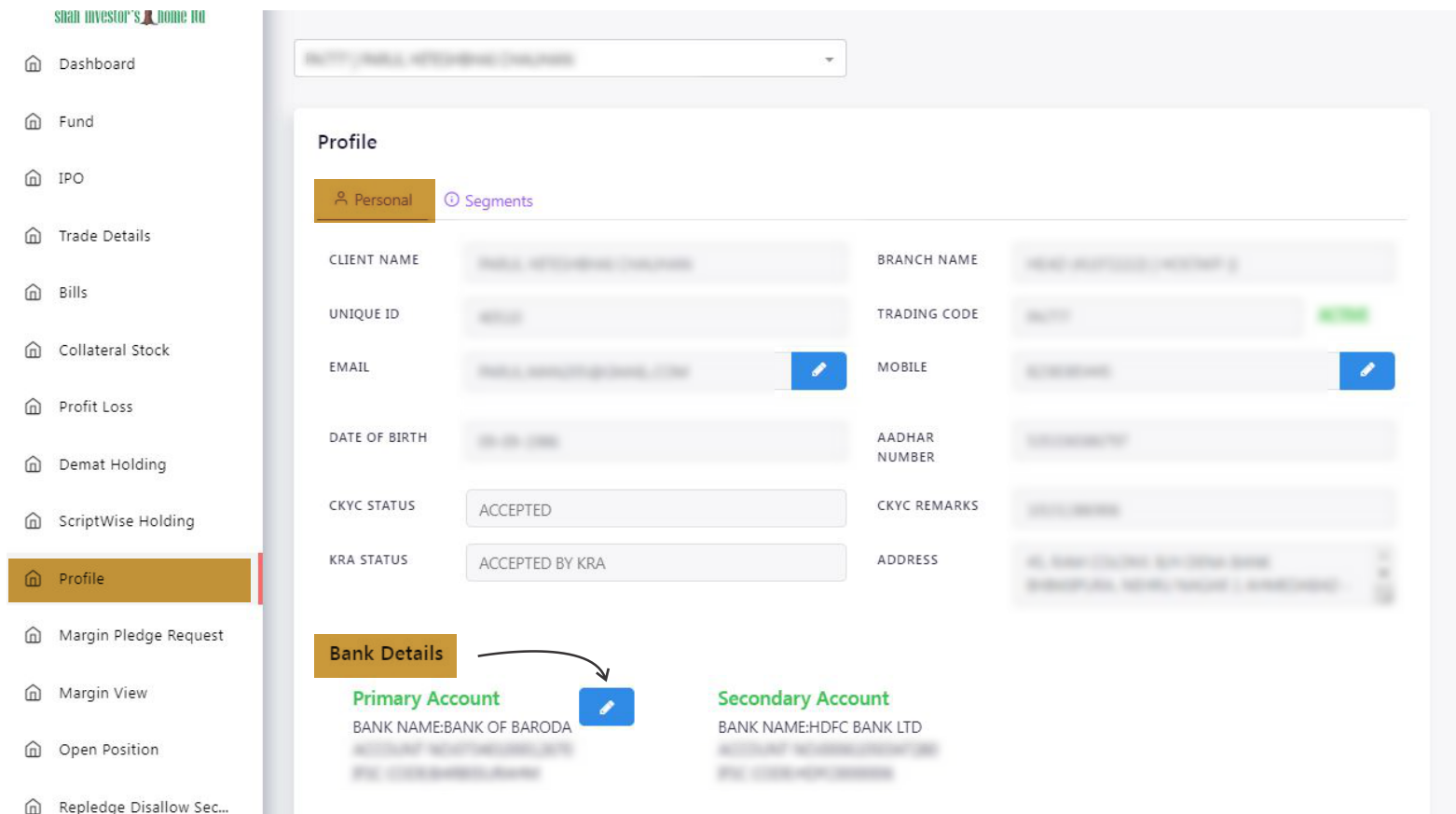


A screenshot of the mobile application's 'Back Office Dashboard'. The interface is split into three main sections. On the left is a vertical navigation menu with items: Dashboard (selected), Fund, IPO, Trade Details, Bills, Collateral Stock, Profit Loss, Demat Holding, ScriptWise Holding, Profile, Margin Pledge Request, and Margin View. The central area is the dashboard, titled 'Dashboard', which includes a search bar at the top, three summary cards for 'INVESTMENT COST' (0), 'CURRENT VALUE' (0), and 'TOTAL GAINS/LOSS' (0 with a green up arrow), and a section for 'TYPE OF HOLDING'. On the right is a sidebar menu with options: Dark mode (toggle), Funds, Security, Reports, Profile (selected), Ipo, Information, Links, and Account setting. At the top right of the sidebar, there is a status bar showing '11:02' and '89%' battery, and a '+ Add Family Member' button. Below the sidebar menu is a bottom navigation bar with icons for PriceView, Trades, Portfolio, Discover, and Account (selected).

After selecting "Back Office", the dashboard will open.

The process for Bank details change is the same for both mobile and web login.

Slide 3: Access Profile



shah investor's home ltd

- Dashboard
- Fund
- IPO
- Trade Details
- Bills
- Collateral Stock
- Profit Loss
- Demat Holding
- ScriptWise Holding
- Profile**
- Margin Pledge Request
- Margin View
- Open Position
- Repledge Disallow Sec...

Profile

Personal Segments

CLIENT NAME: [REDACTED] BRANCH NAME: [REDACTED]

UNIQUE ID: [REDACTED] TRADING CODE: [REDACTED] ACTIVE

EMAIL: [REDACTED] MOBILE: [REDACTED]

DATE OF BIRTH: [REDACTED] AADHAR NUMBER: [REDACTED]

CKYC STATUS: ACCEPTED CKYC REMARKS: [REDACTED]

KRA STATUS: ACCEPTED BY KRA ADDRESS: [REDACTED]

Bank Details

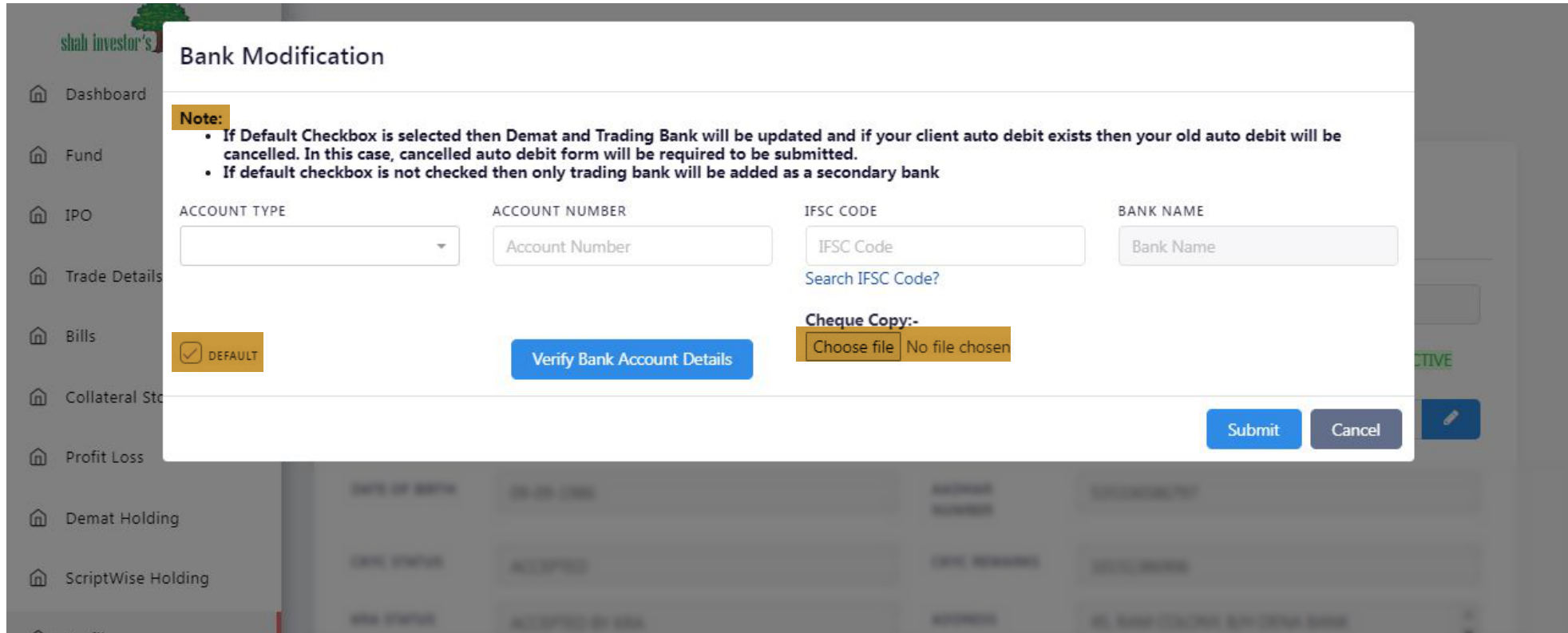
Primary Account [EDIT] BANK NAME: BANK OF BARODA

Secondary Account BANK NAME: HDFC BANK LTD

Click on "Profile" on the left side of the screen.

The Personal Details page will open.

Slide 4: Modify Bank Details



Bank Modification

Note:

- If Default Checkbox is selected then Demat and Trading Bank will be updated and if your client auto debit exists then your old auto debit will be cancelled. In this case, cancelled auto debit form will be required to be submitted.
- If default checkbox is not checked then only trading bank will be added as a secondary bank

ACCOUNT TYPE ACCOUNT NUMBER IFSC CODE BANK NAME

 Account Number IFSC Code Bank Name

Search IFSC Code?

DEFAULT No file chosen

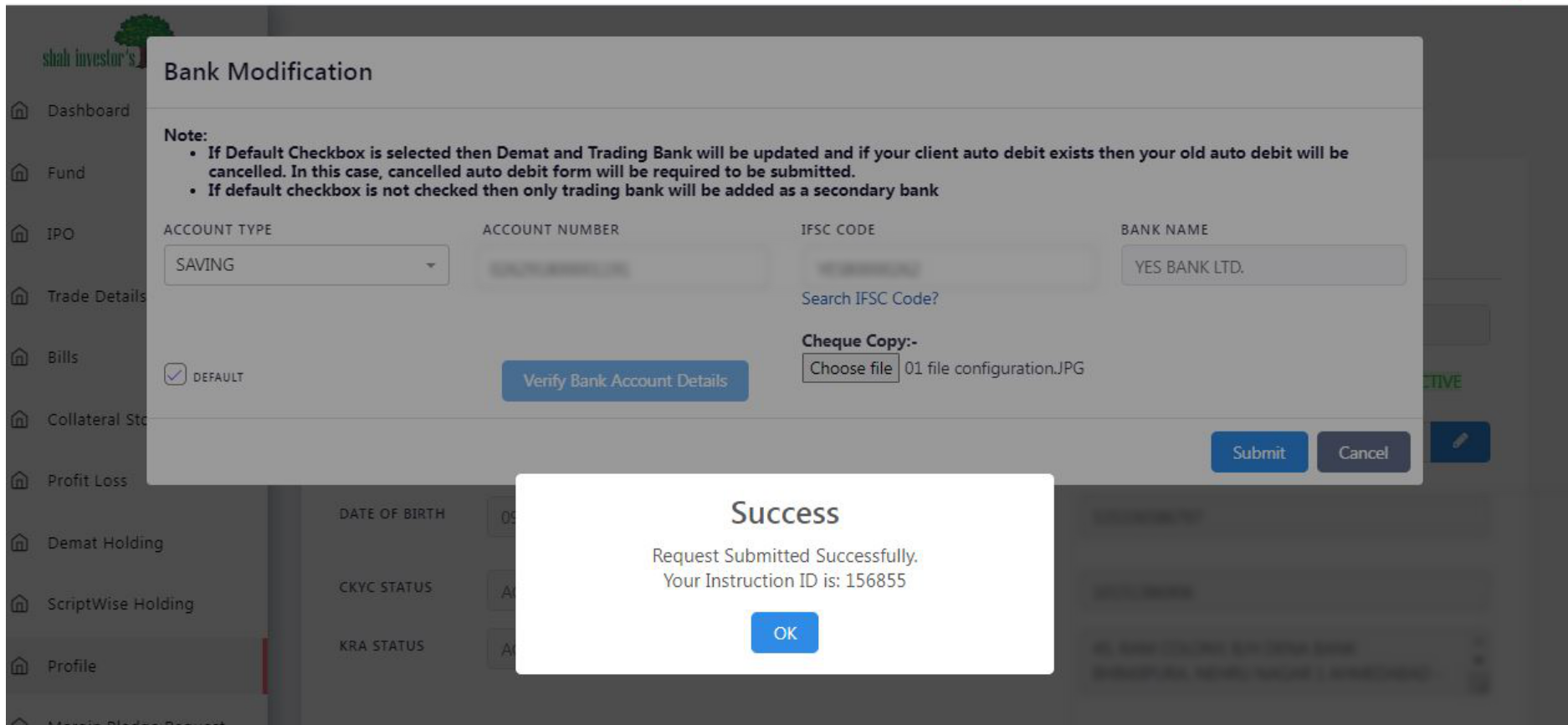
- After tapping the pen icon, the Bank Modification screen will open.
- Fill in the required details and tap "Choose File" to upload a copy of your bank cheque.
- Tick the "Default" checkbox if required.
- Read the important note at the top of the screen.

Slide 5: Mobile Verification

A screenshot of a mobile application interface. The background shows a "Bank Modification" screen with a "Verify Bank Account Details" button. Overlaid on this is a "Bank OTP Verification" dialog box. The dialog box has a title bar, a red instruction "Enter OTP sent on your Mobile No and Email Id.", a text input field with the placeholder "Please Enter OTP", and "Submit" and "Cancel" buttons. Below the dialog box, the "Cheque Copy" section is visible, showing a "Choose file" button and the text "No file chosen".

- Click "Verify Bank Account"—an OTP will be sent to your registered mobile number & email.
- Enter the OTP and tap "Submit".

Slide 6: Bank Verification Confirmation



Bank Modification

Note:

- If Default Checkbox is selected then Demat and Trading Bank will be updated and if your client auto debit exists then your old auto debit will be cancelled. In this case, cancelled auto debit form will be required to be submitted.
- If default checkbox is not checked then only trading bank will be added as a secondary bank

ACCOUNT TYPE: SAVING

ACCOUNT NUMBER: [REDACTED]

IFSC CODE: [REDACTED]

BANK NAME: YES BANK LTD.

Search IFSC Code?

DEFAULT

Verify Bank Account Details

Cheque Copy:-
Choose file 01 file configuration.JPG

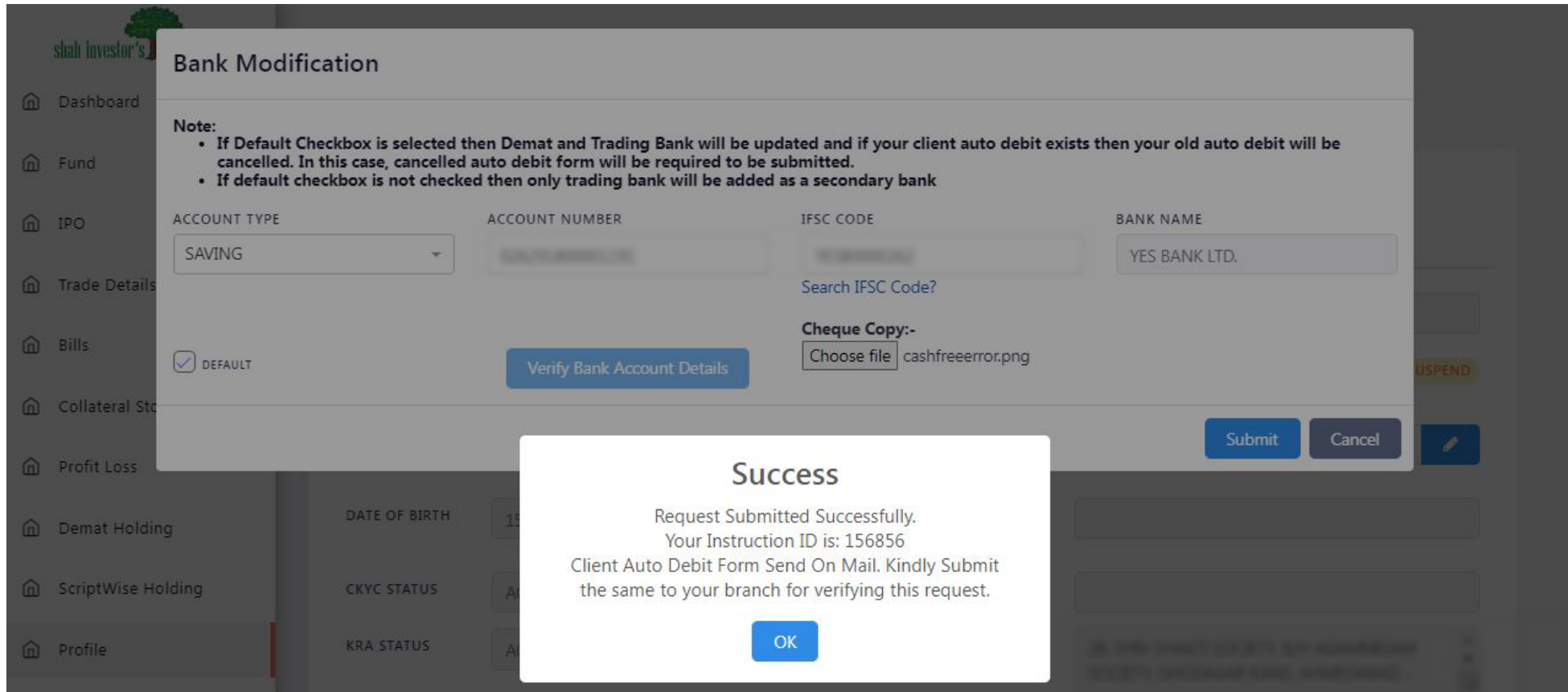
Submit Cancel

Success
Request Submitted Successfully.
Your Instruction ID is: 156855

OK

- You will get the message successfully verified
- A screen with the Instruction ID will appear.
- Tap "OK" to complete the process.

Slide 7: Auto Debit Cancellation (If Applicable)



Bank Modification

Note:

- If Default Checkbox is selected then Demat and Trading Bank will be updated and if your client auto debit exists then your old auto debit will be cancelled. In this case, cancelled auto debit form will be required to be submitted.
- If default checkbox is not checked then only trading bank will be added as a secondary bank

ACCOUNT TYPE: SAVING

ACCOUNT NUMBER: [REDACTED]

IFSC CODE: [REDACTED]

BANK NAME: YES BANK LTD.

Search IFSC Code?

DEFAULT

Verify Bank Account Details

Cheque Copy:-

Choose file: cashfreeerror.png

Submit Cancel

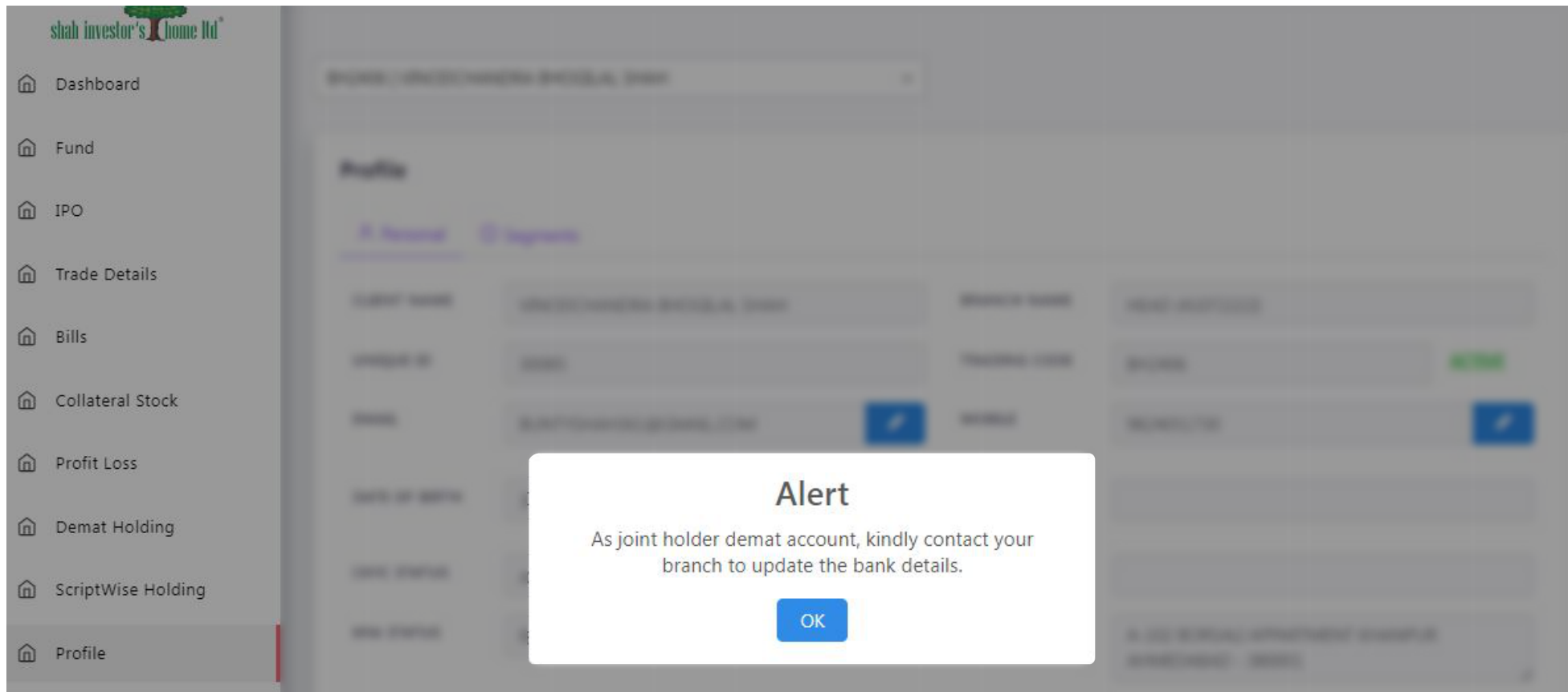
Success

Request Submitted Successfully.
Your Instruction ID is: 156856
Client Auto Debit Form Send On Mail. Kindly Submit
the same to your branch for verifying this request.

OK

**If Auto Debit is active on your current bank account, a message will appear stating:
"You will receive the auto debit cancellation form on your registered email. Submit the form
to your branch. Once submitted, the auto debit will be canceled, and your request will be
verified."**

Slide 8: Important Note



- Bank details can only be changed via the web portal and mobile application for individual single-holder accounts.
- For joint-holder accounts, please visit your branch for assistance.



Contact 079 6822 6822

Thank You