Mandate Management

This document is regarding the NPCI's latest circular (NACH OC001) on mandate management for mandate creation and cancellation.

Create Mandate

1. User can invest either in SIP or lumpsum for investment. For creating a mandate, user selects SIP, enters the SIP amount and selects the date of investment. User then clicks on Invest button.

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< INVEST			
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Select Invest	ment Type	ſime	
D	ate of Investmen	it	
Enter Amount ₹ 1,000			
₹500	₹1000	₹2000	
Return ₹61,139 in based on past perform	3Y (+37.58% p.a) nce		>
I have read and unders	tood the <u>Terms & Cond</u>	itions and Privacy P	alicy
	INVEST		

2. On clicking on Invest button, it will prompt for 2FA authentication via OTP and is redirected to Razorpay screen.



3. User has to make first SIP payment upfront to setup and activate SIP.

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e D	Dhanistocks	2
Paymer	nt Options	
	ILY PAYABLE VIA	XX89
All Payme	ent Options	
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4. After payment is successful, SIP is activated and current transaction status and Setup Mandate button is shown in the bottom. User needs to click on Setup Mandate button to initiate Mandate journey through either NetBanking or UPI.



5. User can either select payment method as NetBanking in case of emandate nach or UPI in case of UPI nach.



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6. User is redirected to Setup AutoPay page where mandate details are present and user has to select verification method and submit.

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← Setup AutoPay	0	
English V Secured by C	digio	
Create Mandate		
Purpose Upto Maximum Amoun Mutual Fand Payment ₹500,000	t of DD	
Start and End date Debit Invase 26 Mar 2024 - 27 Mar 2054 An Dri When Present	mcy ted	
Bank HDFC Bank Ltd	3	
Account Number 3000000000(1090		
Custaney Name Pawan Tandon		
IFSC Code Account Type HDFC00000411 Savings		
5-Mandate Powered by		
Select verification method		
⊖ 📼 Debit 💿 🏦 Net ⊖ 44 Audi	laar	
I hereby authorize findian Clearing: Corporation Lide to debit in account, as por the numbered number and basis account details. Is understand that the stank where I have authorized the debit in mandate possessing charges as mentioned in the basis's latest a of classrees.	y Bank wy leny chedule	
Cincel Submit		
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7. After submitting the required payment method, it will redirect to the bank page and prompt for users login credentials. Once bank account is validated, it will redirect to OTP page for authentication.

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← Setup	AutoPay	0
,	Authentica	ation OTP
Please er	ter the 6 digit	OTP number sent to 58512.
If SMS OTF MR will be For J&K	Not delivery atter initiated on yo registered v customers, th throu	e: mpts are unsuccessful, an sur indian mobile number with the bank. e OTP will be sent only gh IVR.
	CONT	NUE
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8. Once OTP is verified, users autopay request has been successfully sent to bank for validation.



BACK TO HOME

Cancel Mandate

1. User has to visit dhani stocks profile page and then click on Bank details section.



2. User has to click on particular Bank Account on which mandate is present which will redirect to Bank Account Details page.



ve read and understood the <u>Terms & Conditions</u> and <u>Privacy Policy</u>

ADD NEW BANK ACCOUNT

3. The upper section will show the Bank Account Details of the user and the lower section will show the Active Mandates.



4. User has to click on the delete icon placed on the right side of the Active Mandate which will show a popup asking the user for confirmation.

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← 10	CICI BANK LTD DE	TAILS
()	Bank Name	ICICI BANK LTD
	Account No.	058501515589
	IFSC	ICIC0000585
	Trading Bank Type	e Primary
	Demat Bank Type	Primary
Active	Mandates	
AutoPa	iy via OTP	
AutoPay	ID DGA1	568120816334902661
Status		Approved
X Delete AutoPay Are you sure you want to delete this AutoPay?		
YES		

No

5. Once user confirms, mandate is cancelled and mandate cancelled successfully message will be shown to the user.



