Re-KYC User Guide

KYC Update for Active & Dormant Clients

(Only for Individual Clients)

Dear Customer,

Re-KYC is an end-to-end solution for the digitization of Re-KYC Process. This platform will provide utility to existing clients to modify important details like Basic & Contact details, Address, FATCA, Bank addition, Segment Updation and Dormant Reactivation.

User needs to access below link:

https://rekyc.plindia.com

This system is divided into two parts:

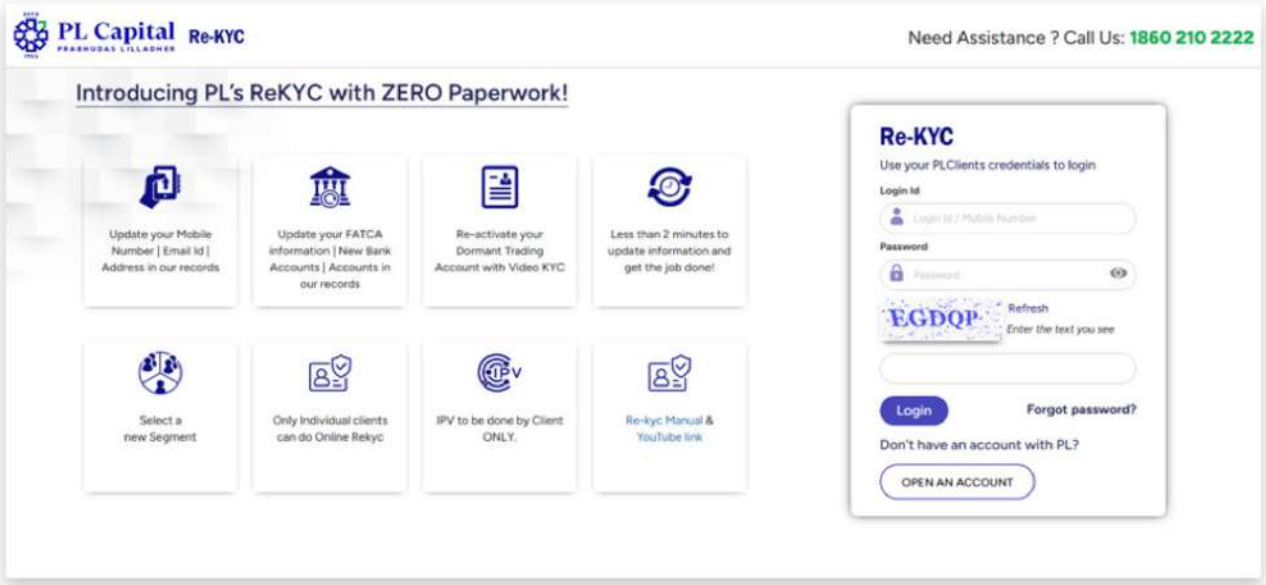
- I'm an Active customer
- Reactivate my Account

You will be directed further as per your account status.

For Active Customers

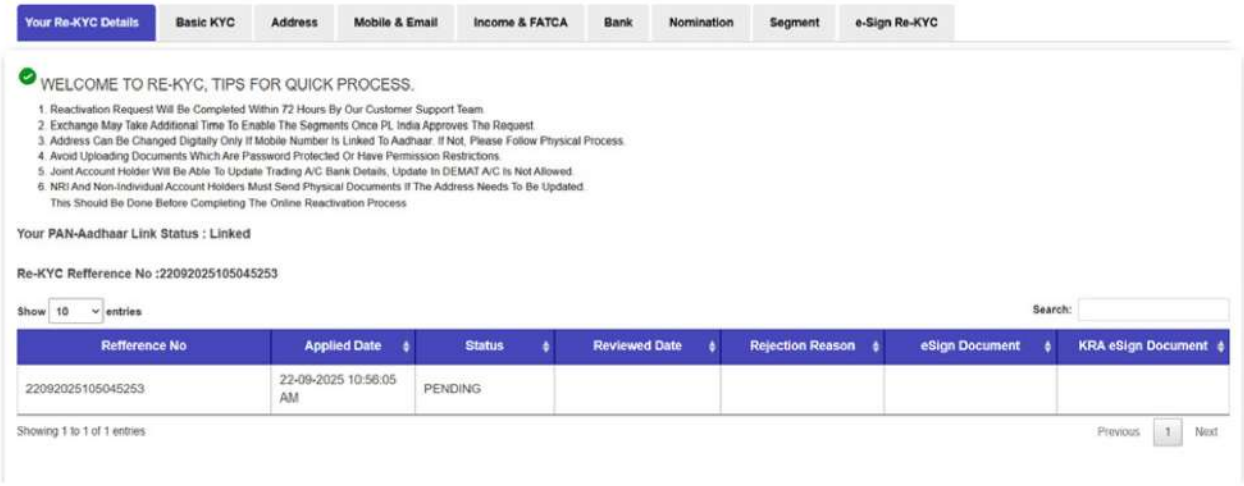
Login Instructions

- To login – Use PL clients login credential.
- In case you don't remember Password use "Forget password" option.
- If not opened account with PL, click "Open an Account" option.



Re-KYC Welcome Page

- Once logged in, you'll be taken to the Re-KYC welcome page, which provides helpful tips to ensure a smooth and speedy process.

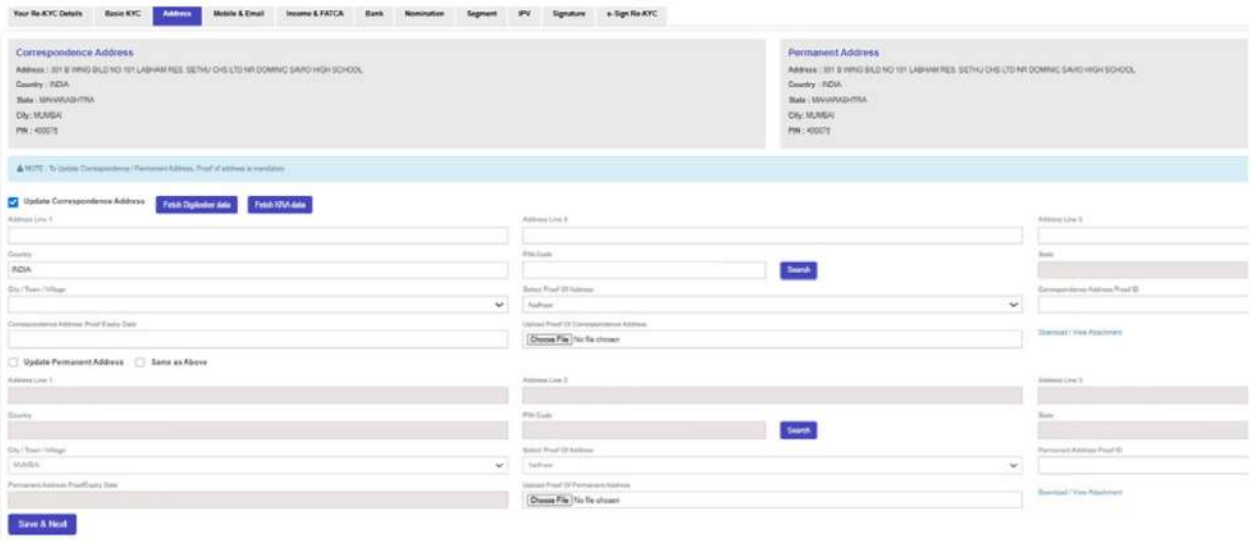


Update Basic Details

- This tab allows you to update your basic details. Grey color field auto populated and uneditable.

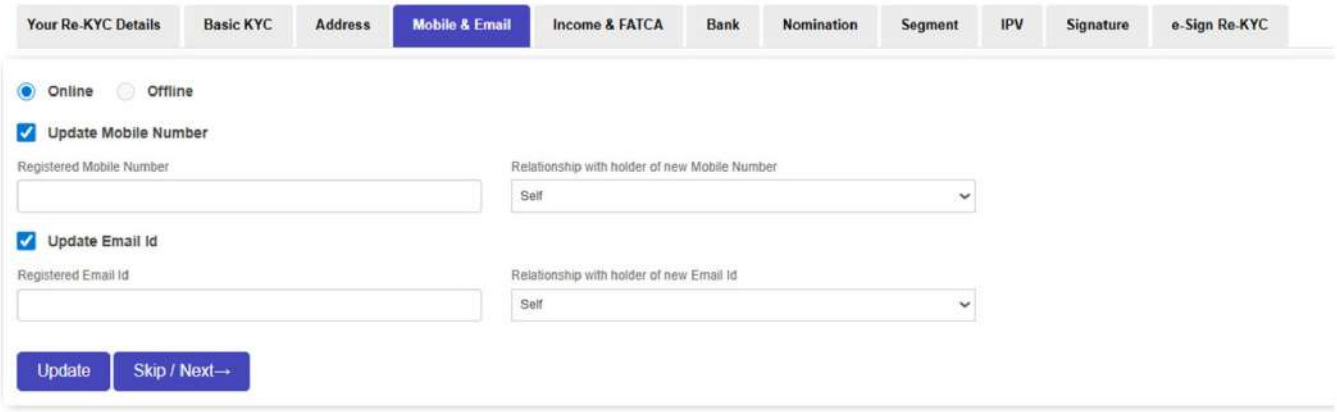
Account Details Modification

- Your accounts details appeared as per our record.
- Tick check box for modification, make required changes and upload supporting documents.
- Click save and next once done.



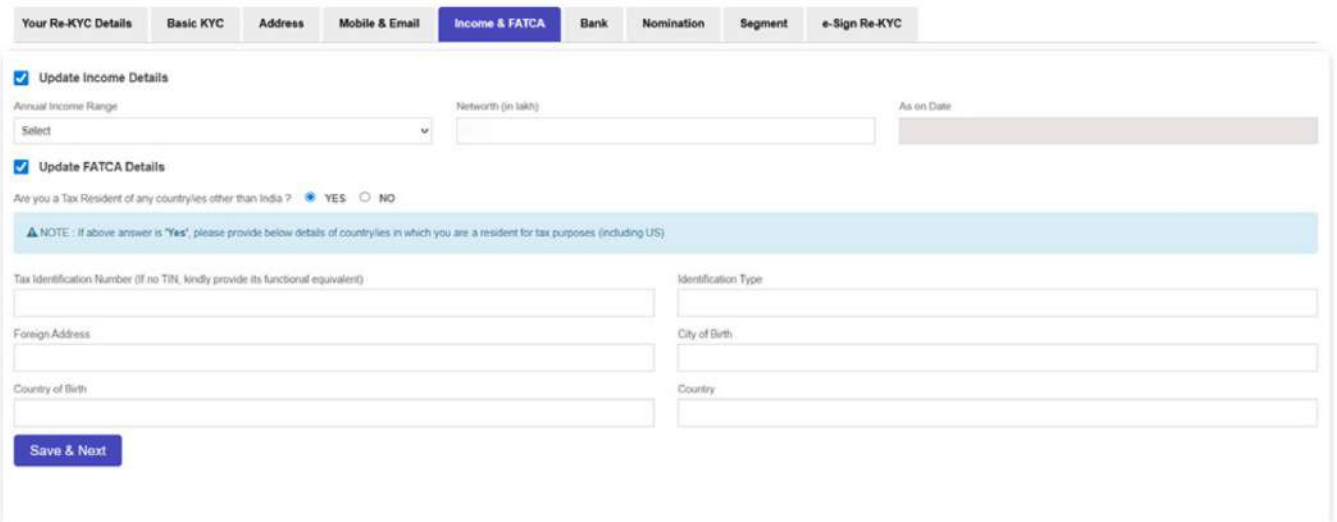
Update Contact Details

- This tab allows you to update your contact details.
- Tick check box for modification, make required changes. You may also select relationship of contact details and update.
- The required changes will be updated via OTP verification. OTP will be sent on existing contact details (mobile & email id both) which are updated in PL's records.
- Update OR click Save & Next in case of no changes.



Update FATCA and Income Range

- This tab allows you to update FATCA and income range.
- Tick the check box for modification, make the required changes.
- Save & Next in case of changes or want to proceed further if no changes are required.

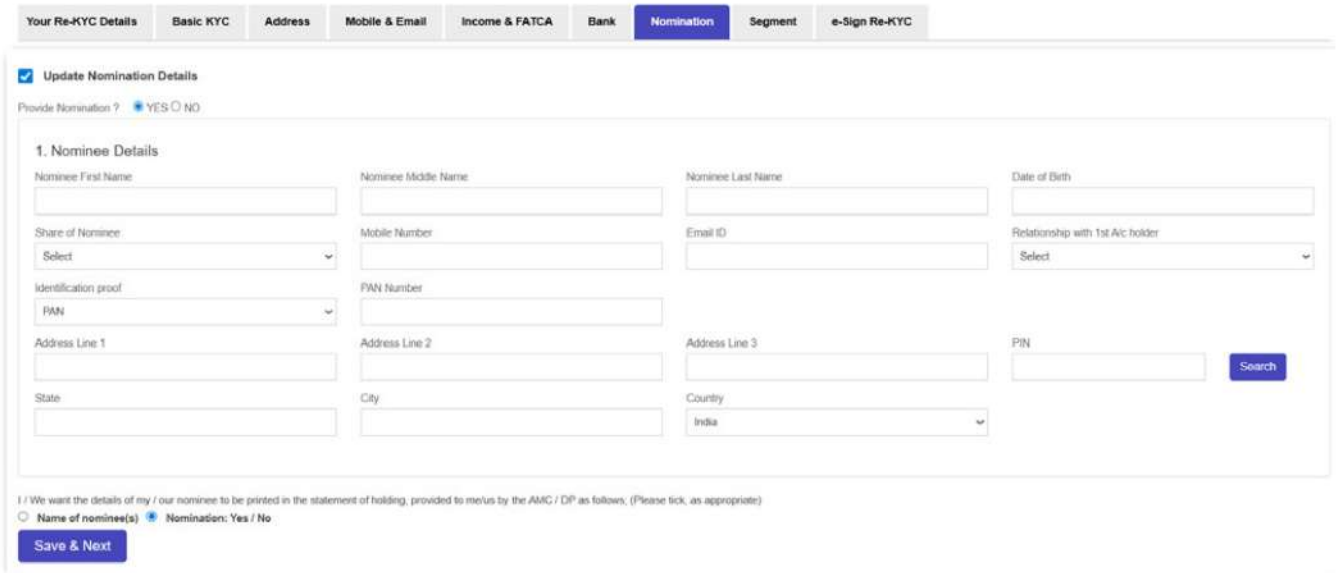


Add New Bank Account

- This tab will allow you to add new bank to the trading account.
- Once you add the details of new bank account click on verify bank account.
- Bank details will be verified through penny drop.
- For successful penny drop, bank proof is not required.
- For failure of penny drop, Bank proof is required to be uploaded. Please ensure that Bank proof has details such as – Name, IFSC, MICR, Bank Account number.
- Uploaded proof will be verified from our end once we receive your request.
- While adding a new bank account, you can set it as your default (primary) account using the available option.

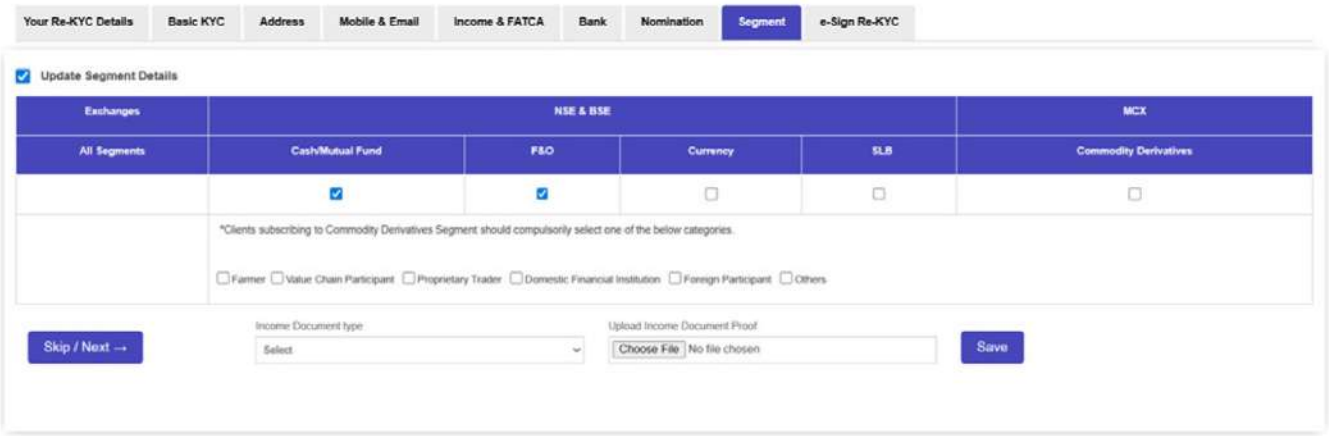
Update Nomination Details

- This page allows you to update the nomination for your account.
- You need to add the nominee details and all the relevant field which are required.
- There is field to add the details of nominee to be printed in the statement of holding provided by the AMC/DP.
- You can also opt out if you do not wish to add the nominee by clicking on "No".



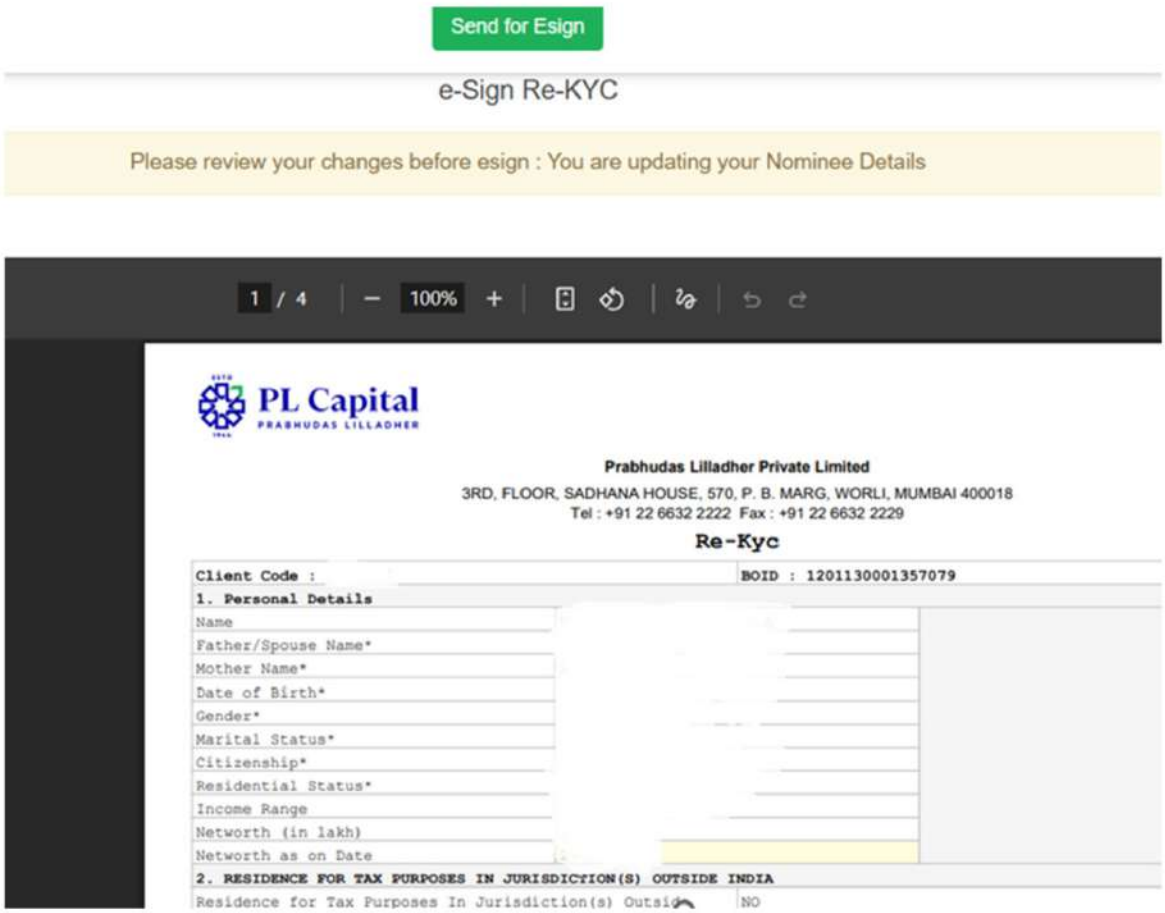
Update Segment (NSE & BSE)

- This page allows you to update your segment in both NSE & BSE.
- Tick the check box to update segment after that tick on the segment which you need to activate. Select the document type and upload the Income proof and click on save.
- Click on Skip/Next in case of no changes are required.



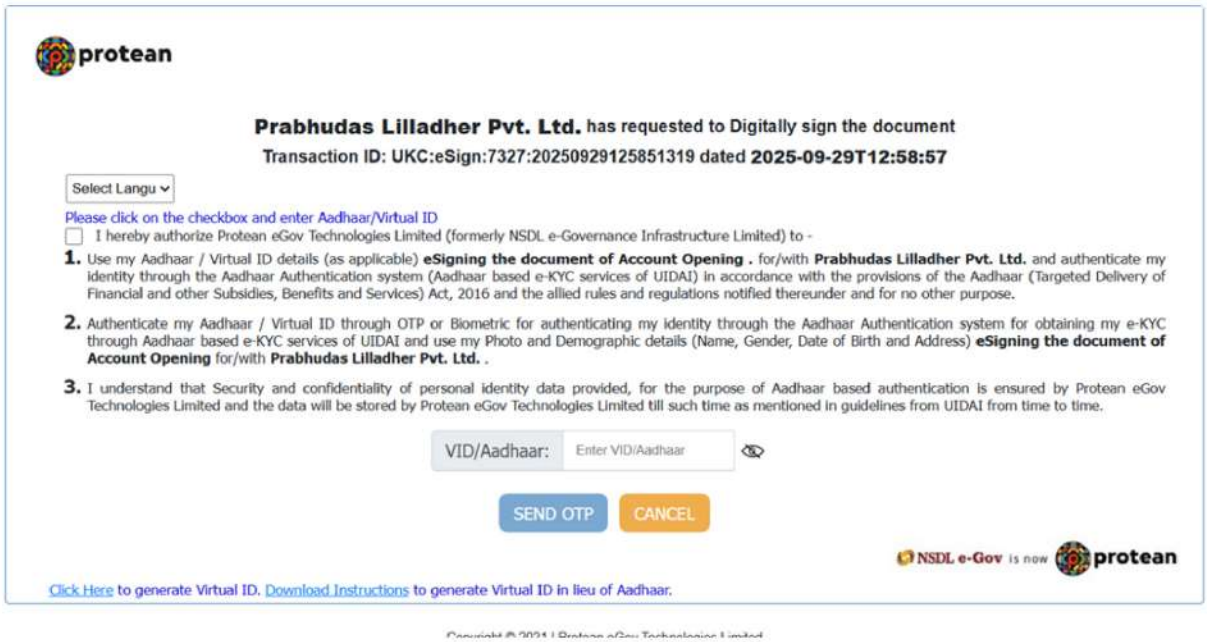
Complete E-sign for Re-KYC

- Final Step is to complete the E-sign for your Re-KYC.
- Preview your document and “Send for E-sign”.



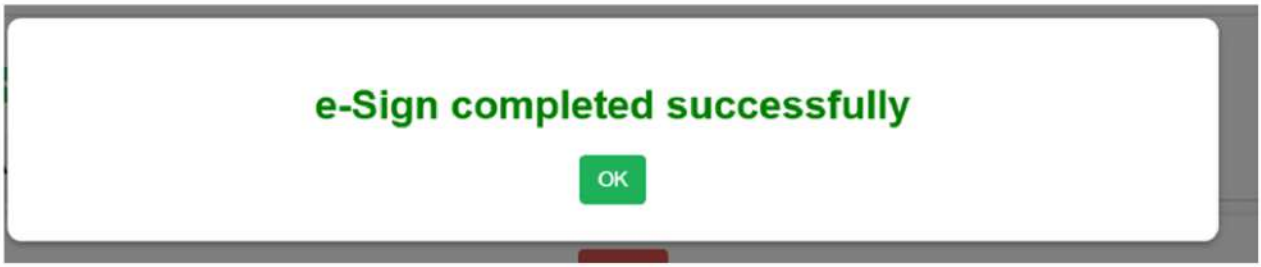
E-Sign Process

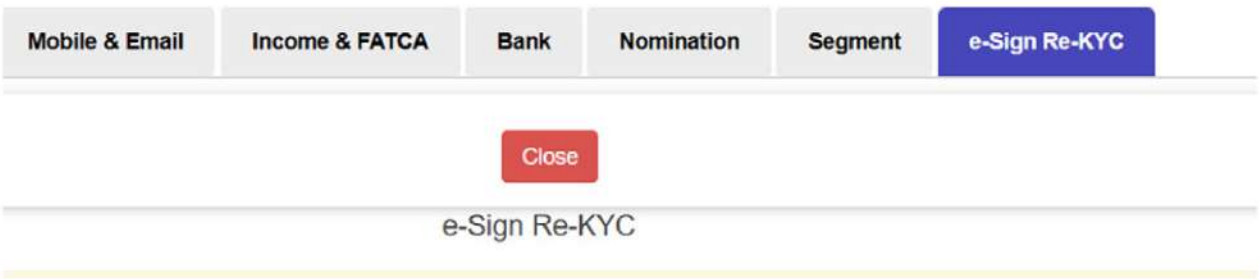
- When Document is sent for E-Sign, it will take you to PROTEAN (NSDL) page.
- Tick on check box stating, "I hereby authorize Protean e-Governance....."
- Enter Aadhar number and Click on Send OTP.
- OTP will be sent on UIDAI registered Mobile no. Enter OTP and Verify.



Important Notes

- Please note in case of any issues/error arrived on PROTEAN page, it is beyond our control.
- In such scenarios, we suggest you to press "Send E-sign" button again and proceed further.
- Once OTP is verified by Protean Portal, page will get redirected to our Re-KYC portal.
- Click on the close button once e-signed has been completed successfully.

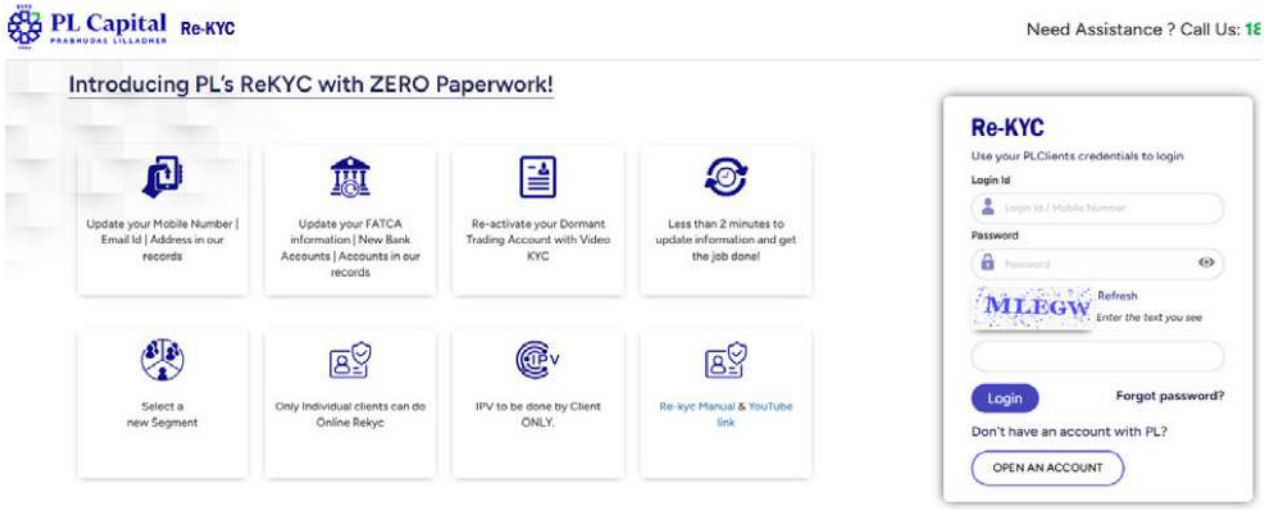




For Dormant Account User

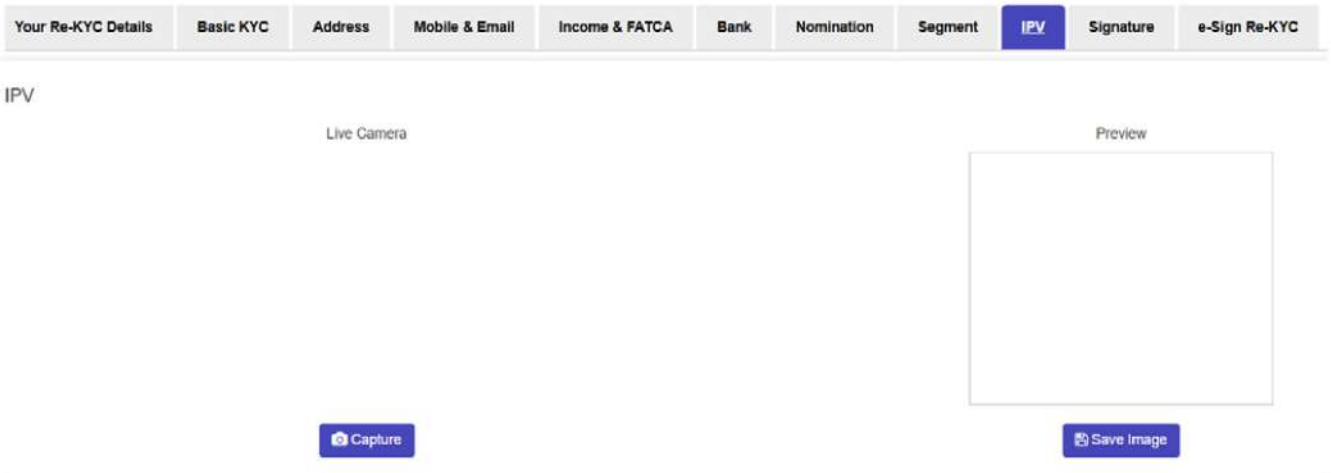
Login Instructions

- To login – Use PL clients login credential.
- User ID will be your trading code and in case you don't remember password, use "Forget password" option.

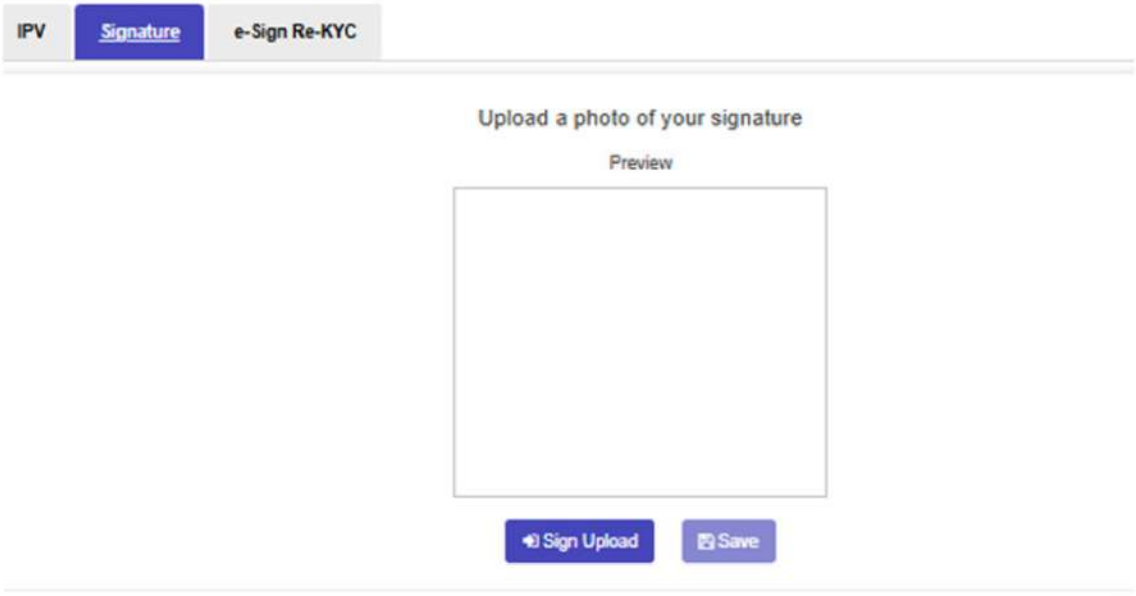


Reactivate Dormant Account

- You may reactivate your Dormant account by clicking on IPV tab.
- Please ensure that you allow permission to access Location and Camera once you are logged in.
- Sit in front of Camera, Capture your picture and Save the image.



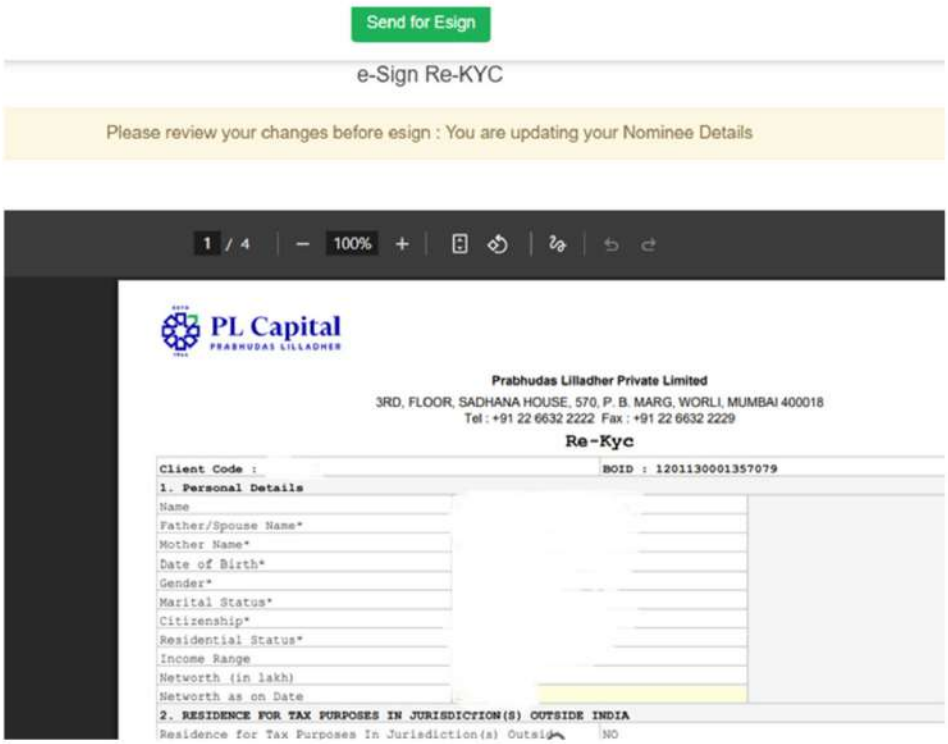
Signature



- Sign on blank paper with blue or black pen and upload the image.
- Do not use ruled paper.
- Click on save then proceed.

Complete E-Sign for Re-KYC

- Final step is to E-Sign your Re-KYC.
- Save the PDF copy on your local drive for reference.
- Preview your document and “Send for E-Sign”.



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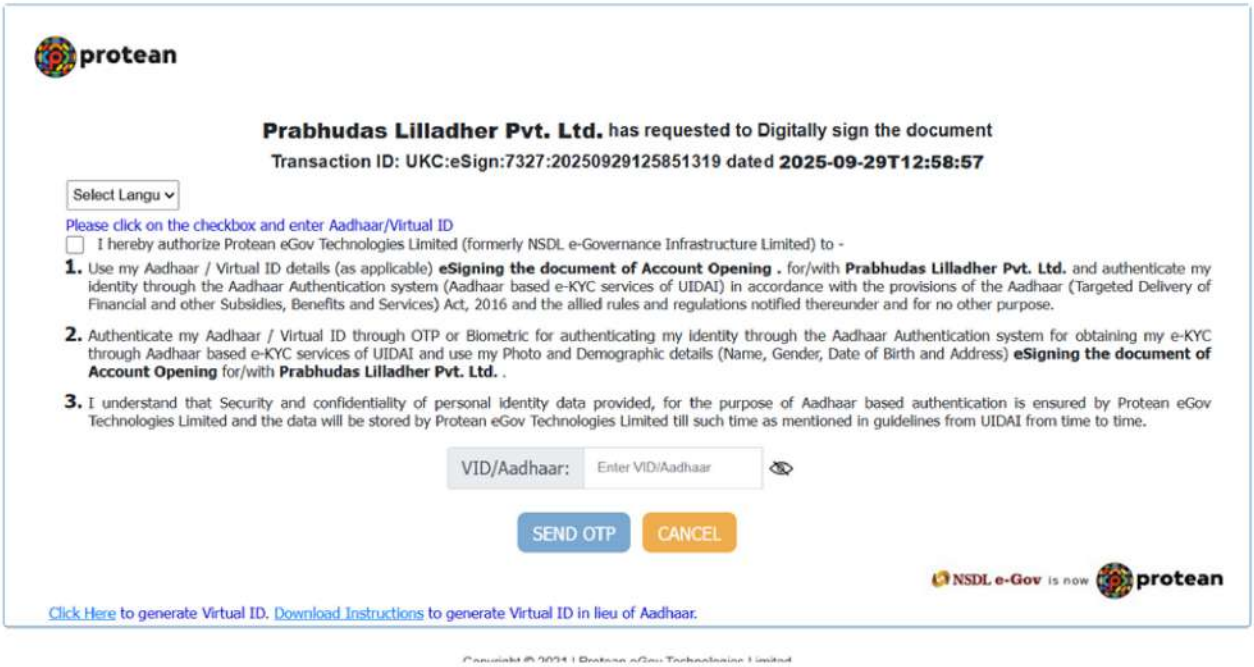

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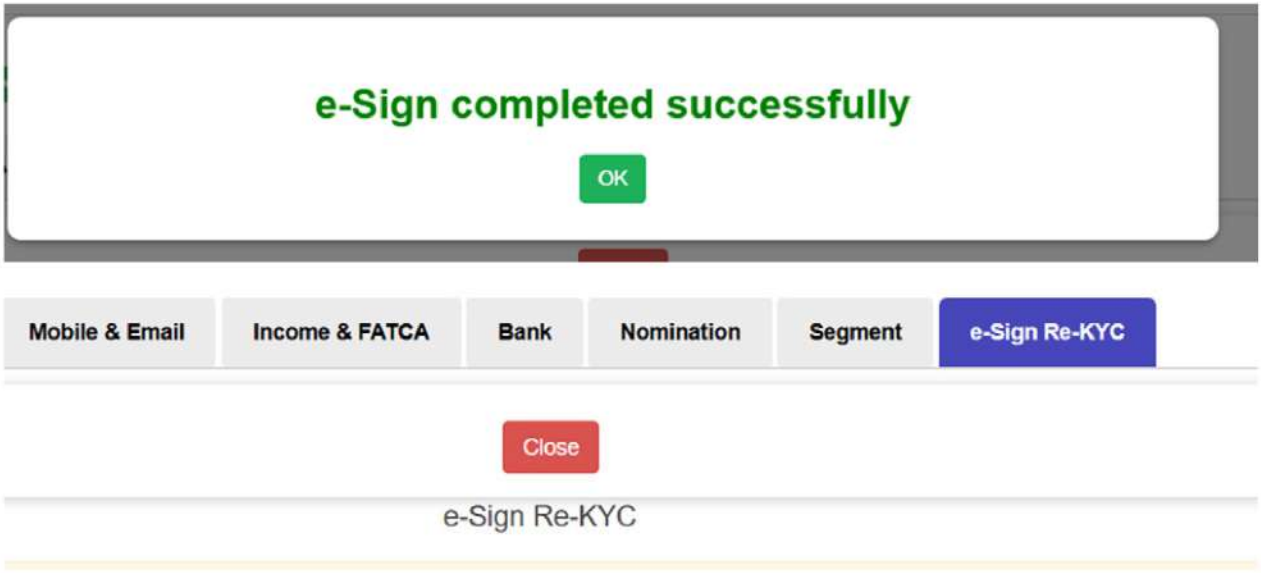

Support

Please feel free to contact us on following details in case of any clarification

Email us at **Customerconnect@plindia.com**

WhatsApp on **+91 74004 32222** | Contact No. **1860 210 2222**

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