

# OLAO USER MANUAL

## USER APPLICATION

This document will provide step by step guidance to the client of Intermediaries for Online Account Opening.

After accessing the intermediary's portal, User must follow the steps as mentioned below: User to visit DP website and click on the link to access account opening. Fill the details as required and click on **"Proceed"**.

Company Logo 36

New Customer Existing Customer

Name As Per PAN	Date Of Birth	PAN	Mobile
POONAM P BHOLE	08/07/2000	SYBPB3344E	91 7744098098
E-mail	Captcha	Type in the captcha box	
POONAMB@1000GMAIL.COM	965942	965942	

I agree with Terms & conditions

Proceed

## OLAO Homepage

User must select the KYC mode from the dropdown list and click on **"Proceed"**.

Company Logo 36

New Customer Existing Customer

Name As Per PAN POONAM P BHOLE

E-mail POONAMB@1000GMAIL.COM

I agree with Terms & conditions

Select KYC Mode

- Aadhaar OTP (eKYC)
- Aadhaar PDF
- Aadhaar XML (Zip file)
- AADHAAR-BIO
- DigLocker-eAadhaarXml

Proceed Exit

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## KYC Mode

Note: User has the option to select any 1 mode of KYC. For this document, KYC mode selected is- Aadhaar OTP (eKYC). This is an online KYC mode. Aadhaar PDF and Aadhaar XML are offline modes. User can also select KRA, if the details of the User are available in KRA.

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User is directed to UIDAI portal for validation of the 12-digit Aadhaar number. User must provide the Aadhaar number and OTP received on mobile number which is linked with Aadhar. Click on **“Validate”**.

Screen Reader

CDSL VENTURES LIMITED  
empowering new markets

Enter VID / Aadhaar

Language English

Based on my request / consent to join CDSL Ventures Limited as a client, I have been informed by CDSL Ventures Limited that the information available with UIDAI will be used for the purpose of KYC which is mandatory for investors as per SEBI guidelines/regulations and that the same has to be uploaded into the SEBI's KRA system.

I hereby consent to authenticate myself by conducting an eKYC transaction through CDSL Ventures Limited (CVL) which is a SEBI registered KRA by providing my Aadhaar / VID Number along with my biometric and/or OTP details.

I have understood that my OTP/Biometric is encrypted and will not be stored/shared and will be submitted to UIDAI (CIDR) only for the purpose of this transaction.

I understand that this eKYC information which may or may not include the Aadhaar Number, Name, Gender, Date of Birth, Address and Photograph is being retrieved from UIDAI to on-board me as a client with KRA.

Based on the above I also give my consent to CDSL Venture Limited to upload my eKYC data into the CVL-KRA system on behalf of CDSL Ventures Limited.

In the event that, you do not want to proceed with this Aadhaar eKYC transaction and you would like an alternative to your identity information for the above purpose, and if you are unable to understand this consent, please press Cancel and reach out to CDSL Ventures Ltd.

If you wish to withdraw the given consent at any time after sharing the Aadhaar details, then kindly visit [www.cvlfundia.com](http://www.cvlfundia.com)

Please Generate OTP Now  SMS  Email **Generate OTP**

Otp sent successfully to \*\*\*\*\*8665 pr\*\*\*\*\*@yahoo.com

Please validate the OTP within 10 minutes of receiving it

**Validate** Cancel

### UIDAI PAGE

Post successful validation of OTP, User is asked to capture **“Live Photo”**. This image is then compared with the Aadhaar card image. Based on the comparison value, User can proceed further.

User must take **“Live Photo”** and enter the 4-digit code displayed on screen. click on **“Proceed”**.

Take a Photo

Please ensure that the below mentioned instructions are followed while clicking the photograph:

- Please type the code shown below in the box provided before clicking the photo
- Look straight to the camera
- Make sure your face is clearly visible and is in centre of the frame
- Capture the photo with proper brightness & preferably with clear white background

7950

7950

Take a photo Cancel

### LIVE PHOTO CAPTURE

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After completion of Aadhar based ekyc, user will send to the next page for updating other few details required for opening demat/trading account. After entering the broking details, user must submit the details and click on “save & continue”.

### BROKING PAGE

On clicking “Save & Continue”, User is directed to DP page. User has to select the plan from “select dp plan from list”, enter other details and click on “save & continue”.

### DP PAGE

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User is directed to “Bank details” page. Here user has to enter his/her bank details like bank account number, IFSC code, account type and click on “save & continue”.

Company Logo 36 Dear POONAM PRAVIN BHOLE, Your reference number is : S00071537

Broking DP Bank Nomination Basic Contact FATCA Docs Preview

Bank Details

Account Number\* \*\*\*\*\* Re-Enter Account Number\* 1234567890 Matching

IFSC\* HDFC0000001 HDFC BANK TULSIANI CHMBS - NARIMAN PT 101-104 TULSIANI CHAMBERSFREE PRESS JOURNAL MARGNARIMAN POINTMUMBAIMAHARASHTRA400 021

Account Type\* SAVINGS BANK ACCOUNT Currency\* RS

Save & Continue

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### BANK DETAILS PAGE

User is redirected to Nomination page, where user has to select the no. of nominee and fill the nominee details and click on “Save & Continue”.

Company Logo 36 Dear POONAM PRAVIN BHOLE, Your reference number is : S00071507

Broking DP Bank Nomination Basic Contact FATCA Docs Preview

Nomination Details

Nomination\* 1 No. of Nominees\* 1

First Nominee

Nominee Name\* SWATI P BHOLE DOB\* 20/12/1972

State\* 100 Relationship\* MOTHER

Address\* A-101, WOODEN CASTLE, PALM BEACH ROAD, SECTOR-20 NERUL(E)

Country\* INDIA Pincode\* 400614

State\* MAHARASHTRA District\* THANE

City\* NERUL

Mobile\* MOBILE Email\*

Identity\* Aadhaar

Aadhaar\* 87905451010

Save & Continue

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### NOMINATION PAGE

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User is directed to Basic details page, where basic details from the Aadhaar have been captured and displayed. User then must fill the required mandatory fields other than those captured via Aadhaar and click on “Save & Continue”.

Broking DP Bank Nomination **Basic** Contact FATCA Docs Preview

Basic Details

— KYC Details

Applicant Name\* MR PRIYESH MADAN KOLI

Father/Spouse\* SELECT

Mother Name\* SELECT

DOB\* 21/07/1998 Gender\* MALE

Marital Status\* SELECT Occupation Type\* SELECT

Nationality\* INDIA Citizenship\* INDIA

+ Your Identity

Save & Continue

### BASIC DETAILS PAGE

User is directed to Contact details page, where Contact details from the Aadhaar have been captured and displayed. User then must fill the other field which are not captured via Aadhaar and click on “Save & Continue”.

Company Logo 36 Dear POONAM PRAVIN BHOLE. Your reference number is : 50071537

Broking DP Bank Nomination **Contact** FATCA Docs Preview

Contact Details

— Permanent Address

Address\* A-202, sadan villa Sadanand peth, Thane-400057

Country\* INDIA PIN\*

State\* MAHARASHTRA District\* THANE

City\* THANE Address Type\* RESIDENTIAL

POA\* AADHAR / UID NO.

Proof No.\* XXXXXXXX1581 Proof Expiry\*

+ Correspondence Address

+ Contact Details

Save & Continue

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### CONTACT DETAILS PAGE

# OLAO USER MANUAL

## USER APPLICATION

User is directed to “FATCA details” page. Click on “Save & Continue”.

Company Logo 36 Dear POONAM PRAVIN BHOLE. Your reference number is : 50074537

Broking DP Bank Nomination Basic Contact FATCA Docs Preview

Residence for tax purposes in Jurisdiction outside India

Are you a US person?  No  Yes

Terms & Conditions

Jurisdiction of Residence Country TIN or equivalent

Country of Birth Place of Birth

Address same as Address Type

Address ADDRESS 1 ADDRESS 2 ADDRESS 3

Country PIN

State City

POA

Proof No. Proof Expiry

Save & Continue

### FATCA DETAILS PAGE

User is directed to “Document Upload” page. User must upload the documents one by one based on the selection done in the previous page. The application will show the list of documents to be uploaded in the droplist. Documents uploaded must satisfy the required specification. If the user doesn't have save the documents in the device, then application camera can be used to click the picture of the document and upload it.

Company Logo 36 Dear POONAM PRAVIN BHOLE. Your reference number is : 80071657

Broking DP Bank Nomination Basic Contact FATCA Docs Preview

Document Upload

Document Type

Upload from my computer

OR

Capture from Camera

Warning!

1. Specimen signature image size should be 400px X 200px at max.
2. Document image size should be 500px X 750px at max.
3. Image size should be 200 KB
4. Document image should be in PNG, JPG or JPEG format only

Save & Continue

Show 10 entries

Document Type	Uploaded Date	View	Delete
CANCELLED CHECKS WITH SIGNATURE	18-02-2022 10:30:23	<input checked="" type="checkbox"/>	<input type="checkbox"/>
FACE AUTH RANGE - USDR	18-02-2022 10:28:03	<input checked="" type="checkbox"/>	<input type="checkbox"/>
FIN	18-02-2022 10:31:16	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PHOTOGRAPH	18-02-2022 10:28:28	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SIGNATURE	18-02-2022 10:30:29	<input checked="" type="checkbox"/>	<input type="checkbox"/>
USD NO - AACHMAR	18-02-2022 10:28:28	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Showing 1 to 6 of 6 entries

Previous 1 Next










### DOCUMENT UPLOAD PAGE

Post uploading the documents, User can preview the documents by Clicking on the icon highlighted in Red.

# OLAO USER MANUAL

## USER APPLICATION

Show 10 entries Search:

Document Type	Uploaded Date	View	Delete
CANCELLED CHEQUE WITH SIGNATURE	8/17/2021 12:52:08 PM		
FACE AUTH IMAGE - UIDAI	8/16/2021 2:52:23 PM		
PAN	8/17/2021 12:52:21 PM		
PHOTOGRAPH	8/17/2021 12:12:51 PM		
SIGNATURE	8/17/2021 12:52:30 PM		
UID NO. -AADHAAR	8/17/2021 12:12:51 PM		

Showing 1 to 6 of 6 entries

Previous 1 Next

After checking the uploaded documents, User must click “Save & Continue”.

User is directed to Preview Page. By selecting the mobile or email option, User provides consent to the eSign service provider to provide the eSigned KYC application form either on the email id or if Mobile is selected a link is provided in the SMS to download the PDF of application form.

Company Logo 36 Dear POONAM PRAVIN BHOLE. Your reference number is : S00081792

Broking DP Bank Nomination Basic Contact FATCA Docs Preview

Preview

Select eSign Mode \* eSign-Digio-OTP

1. You will be redirected to the eSign Service Provider's (ESP) portal to complete Digital Signature Process.
2. ESP shall complete user validation on their portal through OTP / Biometric validation before initiating to eSign process.
3. Keep your Aadhaar number/ Virtual ID ready to enter in the eSign portal. You will receive OTP on your Aadhaar registered mobile number and email id in case of OTP selection.
4. ESP shall obtain consent to initiate OTP / Biometric based Aadhaar authentication and download your details from UIDAI as a part of Digital Signature Process.
5. Once eSign is completed successfully, you will redirect back to Company 36 to complete investment process.
6. KYC application is incomplete if not eSigned and is liable to be rejected.

I would like to eSign the Document via Digio eSign provider  Yes By using identification as  Mobile  Email

Preview Application

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### PREVIEW PAGE

User will select mobile or email option and click on “Preview”. Details submitted by the User are previewed and the User has to give consent to the declaration by clicking on “Confirm” to submit the form for eSigning.

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Kindly confirm the below details

Selected DP Teriff Code	S1	Nomination	No
Nominee Name 1		Nominee Share 1	
Nominee Name 2		Nominee Share 2	
Nominee Name 3		Nominee Share 3	

### Bank Details

IFSC :	HDFC0000001	Account Type :	SAVINGS BANK ACCOUNT
Account Number :	1234567890	Currency :	RS

Declaration\* :  I/we hereby declare that the KYC details furnished by me are true and correct to the best of my/our knowledge and belief and I/we under-take to inform you of any changes therein, immediately. In case any of the above information is found to be false or untrue or misleading or misrepresenting, I am/We are aware that I/We may be held liable for it. I/We hereby consent to receiving information from CVL/KRA through SMS/Email on the above registered number/Email address. I am/We are also aware that for Aadhaar OVID based KYC, my KYC request shall be validated against Aadhaar details. I/We hereby consent to sharing my/our masked Aadhaar card with readable QR code or my Aadhaar XML/Digilocker XML file, along with passcode and as applicable, with KRA and other Intermediaries with whom I have a business relationship for KYC purposes only.\*

**Confirm** Close

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### PREVIEW PAGE

User is directed to authenticate the Mobile no. User must Proceed with Mobile Verification Code and click on “Submit”.

digio Secured by digio

Security code sent to +91-7744-XXXXXX

Security Code: 941417

Didn't receive code? Resend in 00:13

Security code is valid for 10 minutes only

**Submit**

### DIGIO PAGE

Post clicking on “Submit”, KYC application form to be eSigned is displayed on User screen. User can preview the form and click on “Sign now” to proceed for eSigning.

digio Secured by digio

500881792

Company Logo 36

Company 36

Central KYC Registry | Know Your Customer/KYC Application | Individual - NEW

KRA/POB Code: EBEC | dKYC FI Code: IN/BIIM | CDSL DP Id: 087588

ISE Member Id: BSEMEM1 | NSE Member Id: NSEMEM1 | MCX Member Id: MCOEMEM

Clearing Member: | LCC ID: |

SBI REGN NO.: | CIN: DP/SBI/REGN NO.: | Booking SBI REGN NO.: |

CLIENT REGISTRATION KIT

KYC\_FORM\_20230525042514... | By continuing, I agree to do eKYC using Aadhaar to eSign with one of ESPs (NSDL e-Gov or CDSL) Digio is registered as ASP

Cancel **Sign Now**

### E-SIGN PAGE



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User is directed to NSDL Electronic Signature Services for Aadhaar OTP validation. User must give consent for the same and enter the 12-digit Aadhaar number.

**protean**

**Digitech Solutions Private Limited has requested to Digitally sign the document**  
Transaction ID: ESIGN:230525162547274653KZ3SCP2DOWPXM7UV5QH4FFSY3O dated 2023-05-25T16:25:47

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) **eSign of documents requested using Digio - a Digital Transaction Management platform** for/with **Digitech Solutions Private Limited** 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) **eSign of documents requested using Digio - a Digital Transaction Management platform** for/with **Digitech Solutions Private Limited**.
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:

**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.](#)

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Please do not press "Submit" button once again or the "Refresh" or "Back" buttons.

### NSDL Electronic Signature Services Page

An OTP is received on the mobile number registered with Aadhaar. User must Validate the OTP received by clicking on “Verify OTP”.

**protean**

**Digitech Solutions Private Limited has requested to Digitally sign the document**  
Transaction ID: ESIGN:230525162547274653KZ3SCP2DOWPXM7UV5QH4FFSY3O dated 2023-05-25T16:25:47

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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) **eSign of documents requested using Digio - a Digital Transaction Management platform** for/with **Digitech Solutions Private Limited**.
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.

ENTER OTP :

**Verify OTP** **Cancel**

NSDL e-Gov is now **protean**

**Success! otp sent on registered mobile/email id.**

[Click Here to generate Virtual ID.](#) [Download Instructions to generate Virtual ID in lieu of Aadhaar.](#)

Please do not press "Submit" button once again or the "Refresh" or "Back" buttons.

Post clicking on “Verify OTP”, User will receive an email containing the eSigned KYC application PDF form. User can download the same.