Flow for Changing SIP Payment Mode from Ledger to Mandate

1. Once User logged-in (https://mf.indiainfoline.com/MFOnline/login.aspx). Default screen of portfolio will be displayed.

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\leftrightarrow \Rightarrow C	swarajuat.iifl.in/MFOnline/Reports			☆ :
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	$rac{1}{2}$ \mathbf{IIFL} $ $ Online MF	Portf	iolio Invest - Services - Search	Q ↓ Welcome → NP220191 →
	Home » My Reports			
	Portfolio Order Book	SIP Transaction Book SIP Registration Book	Buy MF Now	Start SIP
	Currently you do not have any mutual fund hol	dings with IIFL.		
G				
	DISCLAIMER TEIMA AND CONDITIONS PRIVACY POLICY	INDIA INFOLINE LTD. NSE SEBI REGN. NO. : INB231097537 / I :N8011097533 / INFO11097533 / BSE CURRENCY, MCX STOC INF261097530 / INE261097537, UNITED STOCK EXCHANGE / 47791 BSE MFD: 10234/RA NO: INH000000248 IA NO: INA0 2016	NF231097537/ INE231097537, BSE SEBI REGN. NO. XF EXCHANGE LTD. SEBI REGN. NO.: INE251097530/ LTD. SEBI REGN. NO.: INE271097532 AMRFA: ARN NO: 00000623 Depository Participation: NSDL & CDSL. INDF	185
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2. Click on SIP Registration Book. Below screen will be displayed.

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	Soline MF 🖉 🖗 🗰					Portfolio In	Portfolio Invest - Services - Search Q 🖵 NP22				
	Home » My Reports										
	Portfolio Order Book	SIP Tra	insaction Bo	ok Si	Registration E	Book		Buy	MF Now	Start SIP	
	Order Status	Ir	strument			From Date			To Date		
	ALL	•	Mutual Fur	nd	۳	19/10/2017			19/01/2018		
	Show Scheme Name	SIP Amount (INR.)	Frequency	SIP Start Date	SIP Mode	Bank Name	No. Of Installments Due	Mandate Status	SIP Registration Status	Mandate Action	
	ICICI Pru Banking & PSU Debt Fund - Regular (G)	1000	Monthly	01/02/2018	Aadhaar E- Mandate	UNION BANK OF INDIA	984	Rejected	Accepted	-	
	ICICI Pru Balanced Advantage Fund (D)	1000	Monthly	01/02/2018	Aadhaar E- Mandate	UNION BANK OF INDIA	984	Rejected	Sent To Exchange	-	
	IDBI Diversified Equity Fund (D)	12000	Monthly	10/01/2018	Aadhaar E- Mandate	ICICI BANK LTD	984	Approved	Accepted	-	
	AXIS Banking & PSU Debt Fund (G)	12000	Monthly	11/12/2017	Aadhaar E- Mandate	ICICI BANK LTD	984	Approved	Accepted	-	
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3. If you already placed a SIP with payment mode as Ledger, 'Change payment mode' option will be displayed in the last column as below

IIFL Online MF					Portfolio Inv	est - Servi	ces - Sear	rch	Q Velcome NP220191
Home » My Reports									
Portfolio Order Book	SIP Tra	ansaction Bo	ook SIF	Buy MF Now Start				Start SIP	
Order Status	From Date		To Date						
Accepted	•	Mutual Fur	nd	•	01/11/2017			19/01/2018	
Show Scheme Name	SIP Amount (INR.)	Frequency	SIP Start Date	SIP Mode	Bank Name	No. Of Installments Due	Mandate Status	SIP Registration Status	Mandate Action
IDBI Diversified Equity Fund (D)	12000	Monthly	10/01/2018	Aadhaar E- Mandate	ICICI BANK LTD	984	Approved	Accepted	-
AXIS Banking & PSU Debt Fund (G)	12000	Monthly	11/12/2017	Aadhaar E- Mandate	ICICI BANK LTD	984	Approved	Accepted	-
IDBI Corporate Debt Opportunities Fund (G)	500	Monthly	01/02/2018	NACH Mandate	UNION BANK OF INDIA	984	Approved	Sent To Exchange	Ē
Baroda Pioneer Balance - Plan A (G)	1000	Monthly	01/01/2018	Aadhaar E- Mandate	ICICI BANK LTD	984	Approved	Sent To Exchange	÷
Motilal Oswal MoSt Focused 25 Fund (G)	1000	Monthly	01/01/2018	Aadhaar E- Mandate	ICICI BANK LTD	984	Approved	Sent To Exchange	Ē
DSP BR Focus 25 Fund (G)	500	Monthly	07/01/2018	Ledger	N.A.	984	NA	Sent to Exchange	Change Payment Mode
DSP BR Small And Mid Cap Fund (G)	500	Monthly	01/01/2018	Aadhaar E-	ICICI BANK	984	Approved	Pending	-

4. Click on Change Payment Mode

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Scheme Name	Amount (INR.)	Frequency	Date	SIP Mode	Bank Name	Installments Due	Status	Status	Mandate Action
IDBI Diversified Equity Fund (D)	12000	Monthly	10/01/2018	Aadhaar E- Mandate	ICICI BANK LTD	984	Approved	Accepted	-
AXIS Banking & PSU Debt Fund (G)	12000	Monthly	11/12/2017	Aadhaar E- Mandate	ICICI BANK LTD	984	Approved	Accepted	-
IDBI Corporate Debt Opportunities Fund (G)	500	Monthly	01/02/2018	NACH Mandate	UNION BANK OF INDIA	984	Approved	Sent To Exchange	-
Baroda Pioneer Balance - Plan A (G)	1000	Monthly	01/01/2018	Aadhaar E- Mandate	ICICI BANK LTD	984	Approved	Sent To Exchange	-
Motilal Oswal MoSt Focused 25 Fun (G)	d 1000	Monthly	01/01/2018	Aadhaar E- Mandate	ICICI BANK LTD	984	Approved	Sent To Exchange	-
DSP BR Focus 25 Fund (G)	500	Monthly	07/01/2018	Ledger	N.A.	984	NA	Sent to Exchange	Change Rayment Mode
DSP BR Small And Mid Cap Fund (G)	500	Monthly	01/01/2018	Aadhaar E- Mandate	ICICI BANK LTD	984	Approved	Pending	-
Reliance Small Cap Fund (G)	500	Monthly	01/02/2018	NACH Mandate	UNION BANK OF INDIA	984	Approved	Sent To Exchange	-
Motilal Oswal MoSt Focused 25 Fun (G)	d 10000	Monthly	01/02/2018	NACH Mandate	UNION BANK OF INDIA	984	Approved	Sent To Exchange	-
Aditya Birla SL Advantage Fund (G)	1000	Monthly	01/02/2018	NACH	UNION BANK	984	Approved	Sent To	-

5. Once user click on 'Change Payment Mode', the below Pop-up will be displayed:-



Click on 'Yes' option, Following conditions need to be followed :-

• If client has existing mandate, There should be a gap of 6 days from the date of converting payment mode

- For example :- If client has changed payment on 1st JAN 2018 then the next SIP order installment will get debited after 7th JAN 2018. So that the SIP should not be missed.

- Select any existing E-Mandate/Physical mandate & click on proceed

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Home » Change Payment Mode						
E-MANDATE New Paperless Quick Aadhaar Linked Process			EXIS	TING E-MANDATES		
PHYSICAL MANDATE		Mandate ID	Bank	Account No.	Limit	Unutilized Limit
Physically signed bank approved mandate	۲	102863	CITI BANK	5887337112	50000.0000	50000.0000
	0	102811	CITI BANK	5887337112	50000.0000	50000.0000
	0	102798	CITI BANK	5887337112	50000.0000	50000.0000
		102819	CITI BANK	5887337112	50000.0000	50000.0000
	0	102820	CITI BANK	5887337112	50000.0000	50000.0000
			Please Acco	ee and accept Terms & Conditio pt Term & Condition Proceed	ns	

• If client doesn't have any existing mandate, he/she create a new mandate through E-Mandate & subsequently SIP order will be debited at least 10 days from the date of conversion.

- For Example :- Once an E-Mandate on 1st JAN 2018 is created then the next SIP order installment will get debited after 11th JAN 2018. This allows SIP for the same month can be placed

Create a new E-Mandate

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	$rac{100}{100}$ IIIFL $ $ Online MF	Portfolio Invest - Services - Search	Welcome PARUL012 -
	Select Payment Mode		
	E-MANDATE New Paperless Quick Aadhaar Linked Process	EXISTING MANDATE CP	REATE NEW MANDATE
ъ	PHYSICAL MANDATE Physically signed bank approved mandate	SIP Start Date : 01 Feb 2018	
		You do not have any existing mandates.	2
		Create New Mandate	
	DISCLAIMER INDIA INF TERMS AND CONDITIONS :INB0110/ BRNARD PDI ICY INF2510/	OLINE LTD. NSE SEBI REGN. NO. : INB231097537/ INF231097537/ INE231097537, BSE SEBI REGN 97533/ INF011097533/ BSE CURRENCY, MCX STOCK EXCHANGE LTD. SEBI REGN. NO. : INB26109 97530/ INE261097537_UNITED STOCK EXCHANGE LTD. SEBI REGN. NO. INE271097532 AMRFA	4L NO. 7530/ ARN NO:

If the client had a 12 month SIP through ledger, and 5 installments had already gone past,

then the 6th installment onwards can move on to eMandate

- If client wants to create a new physical mandate, It may lead to missing next SIP installment, since this mandate may take 30 days or more to be processed (Not Recommended).
- Select a bank through drop down
- Select an account through drop down
- Select a Mandate Amount
- Click on Proceed

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🏶 \mathbf{IIFL} Online MF	Portfolio Invest - Services - Search Q 💆 PA	Acome RUL012 -
Home » Change Payment Mode		
E-MANDATE New Paperless Quick Aadhaar Linked Process	CREATE NEW PHYSICAL MANDATE	
PHYSICAL MANDATE Physically signed bank approved mandate	Note: Earlier Bank option has been renamed to Physical Mandate with introduction of new SIP payment options such as Mandate	E-
	Bank : Select Bank 🔻	
	Bank Account : Select Account No •	
	Mandate Amount : Select Mandate Amount v	
	Amount (in Words):	
	Note: Mandate Limit is a daily limit and not SIP amount Once the mandate is registered and approved, you can register new SIPs with the unutilized amount on selected SIP Date in quick and paperless manner. To register this mandate, download the same and follow to instructions on the mandate form.	in he
	I Confirm that this transaction is done purely at my sole discretion on my own	
	Proceed	
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8. Once all the process is done, Success change payment mode will be displayed



9. Navigate to 'SIP registration book' SIP will get changed.

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BNP Paribas Equity Fund (G)	500	Monthly	25/12/2017	Bank	N.A.	12		Sent To Exchange	*
BNP Paribas Equity Fund (G)	500	Monthly	25/12/2017	Bank	N.A.	12		Accepted	
IDBI Diversified Equity Fund (G)	500	Monthly	25/12/2017	Bank	N.A.	12		Sent To Exchange	
BNP Paribas Equity Fund (G)	500	Monthly	25/12/2017	Bank	N.A.	12		Sent To Exchange	1
BNP Paribas Equity Fund (G)	500	Monthly	25/12/2017	Bank	N.A.	12		Accepted	
BNP Paribas Equity Fund (G)	500	Monthly	22/12/2017	Aadhaar E- Mandate	CITI BANK	12	Pending At Bank	Accepted	10 A
BNP Paribas Equity Fund (G)	500	Monthly	27/12/2017	Bank	N.A.	12		Pending	
BNP Paribas Equity Fund (G)	500	Monthly	27/12/2017	Bank	N.A.	12		Accepted	1000
BNP Paribas Equity Fund (0)	500	Monthly	27/12/2017	Bank	N.A.	12		Accepted	
BNP Paribas Equity Fund (G)	500	Monthly	24/11/2017	Aadhaar E- Mandate	CITI BANK	12	Pending At Bank	Accepted	1.5.1
BNP Paribas Equity Fund (G)	500	Monthly	27/11/2017	Aadhaar E- Mandate	CITI BANK	12	Pending At Bank	Accepted	1.20
BNP Paribas Equity Fund (0)	500	Monthly	27/11/2017	NACH	CITI	12	Pending At	Accepted	