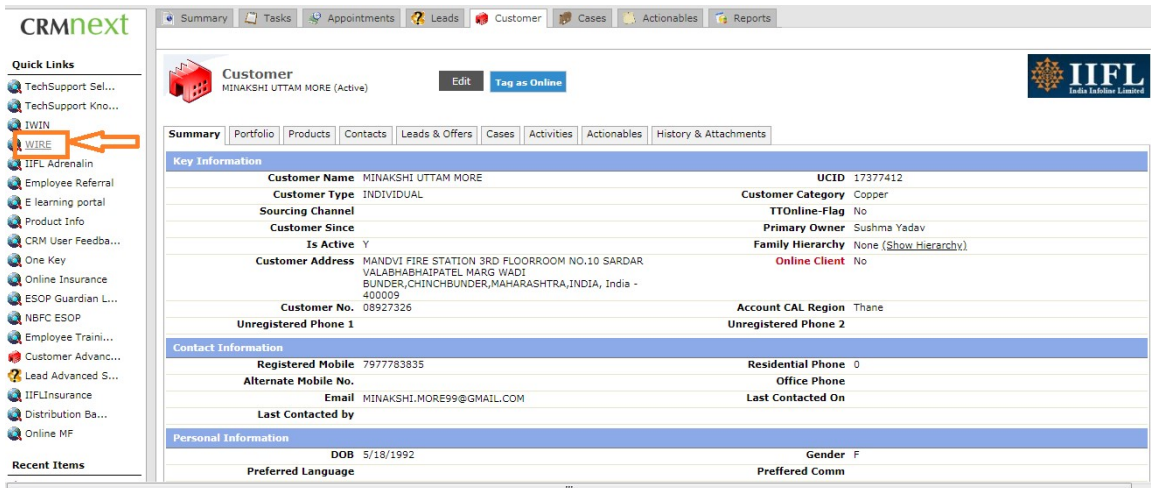


Process of placing order of Market smith

In CRM, first agent has to search for login in Customer >> Advanced Search>> Enter the login id>> Go to Wire in left side (Below is the screen shot)



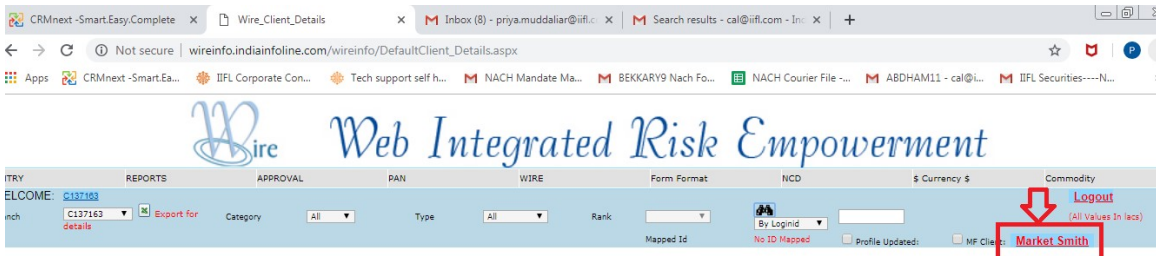
The screenshot shows the CRMnext interface. On the left, there is a 'Quick Links' menu with 'WIRE' highlighted by an orange arrow. The main content area displays customer details for 'MINAKSHI UTTAM MORE (Active)'. The details are organized into sections: Key Information, Contact Information, and Personal Information.

Key Information	
Customer Name	MINAKSHI UTTAM MORE
UCID	17377412
Customer Type	INDIVIDUAL
Customer Category	Copper
Sourcing Channel	TTOnline-Flag
Customer Since	No
Is Active	Y
Primary Owner	Sushma Yadav
Customer Address	MANDVI FIRE STATION 3RD FLOORROOM NO.10 SARDAR VALABHAIIPATEL MARG WADI BUNDER,CHINCHBUNDER,MAHARASHTRA,INDIA - 400009
Family Hierarchy	None (Show Hierarchy)
Online Client	No
Customer No.	08927326
Account CAL Region	Thane
Unregistered Phone 1	
Unregistered Phone 2	

Contact Information	
Registered Mobile	7977783835
Residential Phone	0
Alternate Mobile No.	
Office Phone	
Email	MINAKSHI.MORE99@GMAIL.COM
Last Contacted by	
Last Contacted On	

Personal Information	
DOB	5/18/1992
Gender	F
Preferred Language	
Preferred Comm	

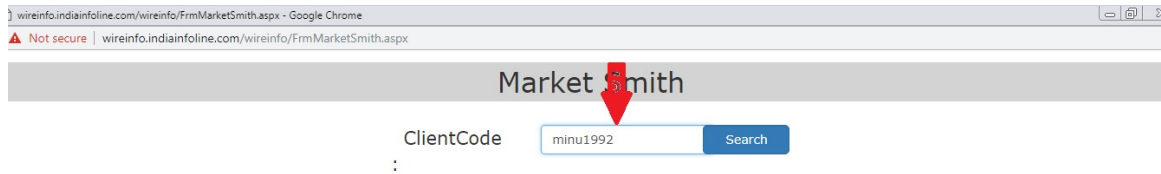
Click on Marketsmith (Shown in screenshot)



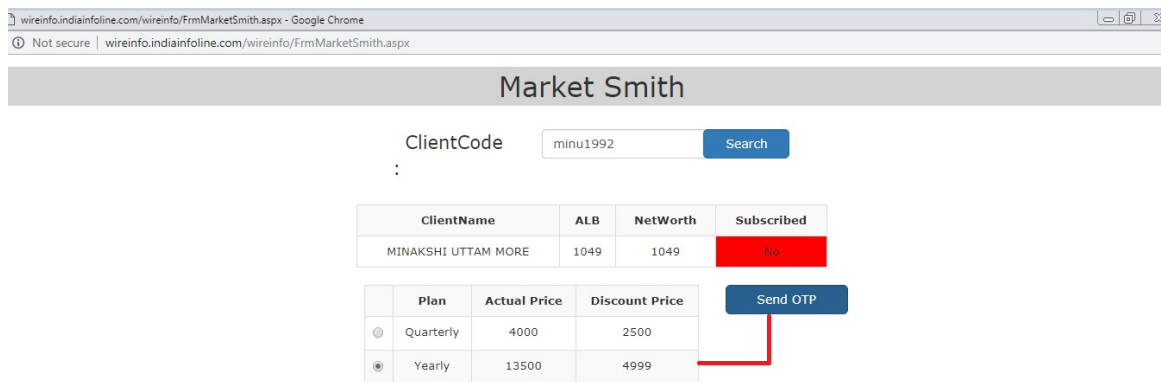
The screenshot shows the 'Wire Web Integrated Risk Empowerment' interface. The header includes the 'Wire' logo and the text 'Web Integrated Risk Empowerment'. Below the header, there is a navigation bar with tabs for 'REPORTS', 'APPROVAL', 'PAN', 'WIRE', 'Form Format', 'NCD', '\$ Currency \$', and 'Commodity'. The main content area contains a search bar with 'C137162' entered, and a 'Logout' button. A red box highlights the 'Market Smith' icon in the bottom right corner.

In case you are not seeing the Market smith Icon, you will have to take the access for the same. To get this access, please mail to appsupport.broking@iifl.com with content as - Access required for market smith module on Webwire. Also share your employee code along with this mail. You should get the access by EOD, in case of any urgency or escalation you can mail to kevin.gogri@iifl.com for the access.

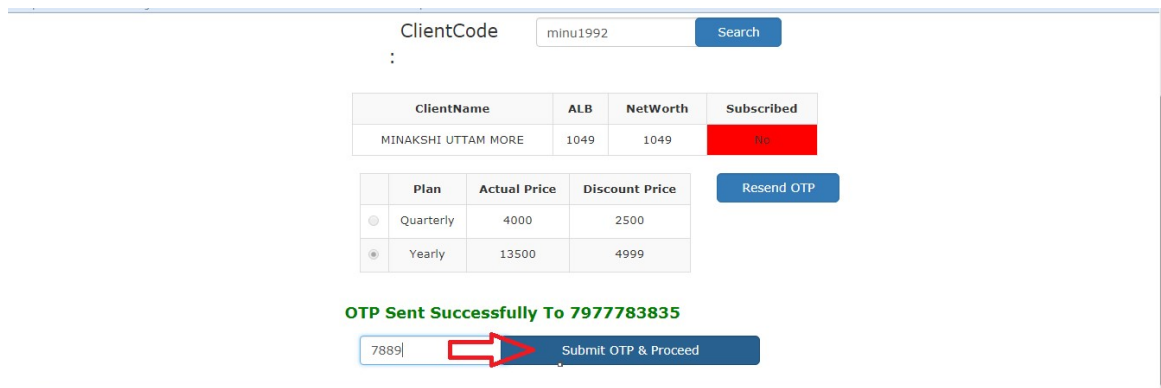
Enter the client code then click on search option (Shown in screenshot)



After clicking the search option select the plan >> Quarterly or yearly and click on Send OTP



Then ask OTP from client and enter the OTP and click on Submit OTP and proceed. Shown in screenshot



Once the OTP is submitted order gets punched successfully and the amount gets deducted from client's ledger.

List of clients or report is available at the bottom. Data can be accessed for different date ranges.

Market Smith

ClientCode

:

ClientName	ALB	NetWorth	Subscribed
VIJAY KAPAR	10499	10499	No

	Plan	Actual Price	Discount Price	<input type="button" value="Resend OTP"/>
<input type="radio"/>	Quarterly	4000	2500	
<input checked="" type="radio"/>	Yearly	13500	4999	

Your premium pack has already been activated.

Market Smith Data

ClientCode	Period	Sub. StartDate	Sub. EndDate	Amount	PaymentMode	SaleMonth	SalesSource	ORC	CreatedDate
88715843	Yearly	2019-01-14	2020-01-13	4999.0000	Ledger	Jan 19	Offline	C149469	2019-01-14

* IR calculation for this product is done based on Order requestor code and is not based on client mapping.

* We can provide a free quarterly subscription to clients who are providing a margin of **5 lakhs** and above. Process of providing this would be offline. You can share the list of clients for which you want to provide quarterly free access of market smith (provided they give the above margin) to gourav.soni@iifl.com and cc it to prateek.agrawal@iifl.com. Free quarterly access would be granted within 1 week of receiving the email.