

Steps for providing consent in NXT for fetching Bank and Demat account statements.

The detailed steps for providing consent for auto fetching of Bank and Demat statements by Angel One Limited are given below.

- The AP will have to login as an Admin user in NXT.
- Here's the path - **Profile > Upload Statement**

The screenshot displays the NXT dashboard for a user named 'B2b Client-cbho'. The user's profile information includes 'CBHO' and 'Last Login in NXT : 29-01-2024 01:37 PM'. The dashboard has a navigation menu with options like 'Dashboard', 'Sales', 'Services', 'My Business', 'Mutual Funds', 'Reports', 'Utilities', 'Insurance', 'Wealth Products', 'E-Welcome', and 'Downloads'. The 'Upload Statement' section is active, showing a sub-menu with 'Registration', 'Bank', 'Terminal Info', 'Authorised Person Info', 'Upload Statement', and 'Terminal Request'. Under 'Upload Statement', there are radio buttons for 'Bank' (selected) and 'Demat'. The main content area contains the following text: 'As a part of audit process, the Bank statement has to be shared with AngelOne. Please share your consent to auto fetch the details as required. The consent will be taken against the Bank account linked with this terminal phone number 9719298864. Please make sure that you have selected the bank account registered in NXT Platform. If required, change the terminal phone number from here'. A blue 'PROCEED' button is visible. At the bottom, there is a note: 'Note: In case you have forgot to share the consent of any other bank, please upload the statement of that bank here'. On the right side, there is a 'Downloads' section with a list of items: 'Digital Card', 'TDS Certificate', 'Compliance', 'Compliance Policy', 'GST Invoice', 'Registration Certificates', and 'Update GST Details'. Below that is a 'Branch Manager' section with fields for 'Name' and 'Phone' (+91 9155491554).

1. The user will then have to click on **PROCEED** to initiate the process.
2. The user will then be directed to the CAMS window and an OTP will be sent on the registered Mobile number of the user.
3. The user will then have to select the Bank account for which consent will be shared.
4. Once done, the user will be directed back to the NXT dashboard.
5. The consent captured for the user will be valid for 1 year from the date of consent captured. Bank account and Demat account statements will be auto-fetched in each quarter for the respective Bank and Demat accounts.
6. The same process will have to be followed for the Demat statements as well.
7. The user will be able to see the progress of the consent process of the given Bank and Demat accounts.

Registration Bank Terminal Info Authorised Person Info Upload Statement Terminal Request Compliance Certification Static IP

Bank Demat [UPLOAD STATEMENT LOGS](#)

Consent for following BANK accounts was unsuccessful. Please upload the BANK statement manually to proceed further.

Name: City Union bank	Account No: xxxxxxxx8276	Name: City Union bank	Account No: xxxxxxxx8279	Name: City Union bank	Account No: xxxxxxxx8277
REJECTED		REJECTED		REJECTED	
↑ UPLOAD STATEMENT		↑ UPLOAD STATEMENT		↑ UPLOAD STATEMENT	

Name: City Union bank	Account No: xxxxxxxx8275	Name: City Union bank	Account No: xxxxxxxx8274
REJECTED		REJECTED	
↑ UPLOAD STATEMENT		Manual Statement Uploaded	

Consent Date: 20/01/2024 | Valid Till: 19/01/2025

Note: In case you have forgot to share the consent of any other bank, please upload the statement of that bank [here](#)

8. The following status will be updated in the status screen:
1. **Success** - This will be displayed once the consent is successfully captured for the respective Bank and Demat accounts.
 2. **Rejected** - This will be displayed for the cases where the consent is not being captured for the Bank and Demat accounts. For such cases the user will be asked to manually upload the statements directly from the dashboard.