Online Closure Process

- 1. In order to access On-Line Closure module, the Client has to first open web site of SMIFS Limited using the URL: <u>www.smifs.com</u>
- 2. After opening the URL, on the home page of the website, Client has to click on the back office login tab at the right side of the screen. Screenshot is given below:



3. Once the back office login button is clicked, the following login screen appears:

ackoffice Login			New Client? REGISTER HERE!
Smifs Limited	Sign In		SharePro AIR is here !
SMIFS	User ID:		Now get the backoffice on the go right on your phone. Click on the images below to install SharePro Air on your cellphone
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	Password		MyBroker
KOLKATA - 700 020		_	Later C and
	Forgot password?		transf D
	Login Type	•	hundrig (Sound /
	Client	÷	
	Accounting Year	•	Get it in
	2324	•	Download on the App Store
	I'm not a robot	TCHA - Terms	
Powered by SharePro		Sign in	

4. Client has to log in by giving his/her back office login username and password. If login is successful, the following screen appears:

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Smifs					~		🛋 🛍 2023	-2024 🔀 🔳 🕞
Kallol Saha -	Dashboard Appo	intments Tick	kets					
🕈 Activity <	🗠 Live Refres	h					Based on Live o	data upto 3:32 PM
Trading <		Ø Over	rall Positions	🛯 Last 15 email	s ₹Last 5 Paym	ents/Receipts	✓ Your overall Ledger Balance :	₹ 0.00 Cr
Derivatives < Demat	Segment	Ledger Balance	Cash/ FDR	Exchange Margin	Live Obligation	Gross Balance	🎝 Quick Links 🗸	
Finance <	Overall	0.00 Cr	0.00 Cr	0.00 Cr Fin	0.00 Cr al Net Position	0.00 Cr 0.00 Cr	ll Share Collateral ₹ 0.00	+ 2
🖌 Utilities 🛛 <								
Depository <							Stocks in DP ₹ 21,714.67	+ 2
₹ MTF Reports <							Coming Corporate Action upto 12th Nov'23	+ 2
📥 Re-KYC 🛛 🗸								
	EBİ Sebi COmpl	aints REdress Sy	ystem					
Powered by								

- 5. In order to close the account, Client has to click on "Re-KYC" menu at left bottom side and then click on "Account Closure" sub menu.
- 6. Then the Client will land up on the online Closure page (screenshot given below) from where he/she can close either or both of Trading and DP accounts.

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Smifs	~	■ 🛗 2023-2024 🔀 🗮 🕞
Kallol Saha -	Dashboard Appointments Tickets Account Closure *	
🕈 Activity <	Close Account	
Trading <	You can use this process to close your account. Fill all form field to go to next step	
derivatives <		
💼 Demat 🛛 🔍 <		
Finance <	Choose Account Trading account Depository account Finish	
🖋 Utilities 🛛 <		
Depository <		
₹ MTF Reports <	What do you want to close?	
Are-KYC 🗸 🗸	✓ Trading account - KALLOL SAHA [54483]	
Account Modification	Depository account	
Account Closure	 DPId: IN301629 Clientid: 10184329 DPId: IN303794 Clientid: 39274065 	
		_
Powered by	Next Step	
https://bo.smwml.com/shrdbms/userlog	in.ss#	•

7. The Closure screen of Trading account is given above. After filling up the details, the "Next Step" button is to be clicked.

	dbms/userlogin.ss		아 남 ☆ 🛊 🛛 🔇 :				
mifs		~	🝽 🏥 2023-2024 🔀 🗮 🚱				
Kallol Saha - Dasht	poard Appointments T	ickets Account Closure ×					
Activity <							
Trading <	Close Tre	ding account					
Derivatives <	Close Ira						
Demat <	Your UCC:	54483					
Finance <							
C Utilities <	Sole/First Holder:	KALLOL SAHA					
Depository <	Ledger	0.00					
NTE Deserts	balance:						
MIF Reports <	Testing						
Re-KYC V							
Re-KYC Account Modification			A				

8. Then the Client lands up to the screen of Closing Demat Account. The screenshot is given below:

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Smifs						~							2023-202	24	•
Kallol Saha -	Dashboard	Appointme	ents Tickets	Account Closure	×										
🖌 Activity <												_			*
Z Trading <		DPID:	IN30162	9			ClientId:	101843	29						
📥 Derivatives 🛛 <															
💼 Demat 🛛 🗸 <		First Holder:	KALLOL	SAHA			Target	Acco	unt						
Finance <							larger	ALLO	unt						
🖋 Utilities 🛛 <		Second Holder:	NA				Enter D	PID							
Depository <		Third	NA				Enter C	lientId							
₹ MTF Reports <		Holder.					Upload clie	nt master	mapped and	d signed	by target DP:				
📥 Re-KYC 🛛 🗸		Upload (Choo	se File No f	e: *Select file in JPG, PNG The chosen	format		*Select file in JPG Choose	File No	file chos	en					
Account Modification												_			
Account Closure															
		Holdin	ng details												
					Total	Pledged	Lockin	Free	Close	Close					
		Date I	SIN	ISIN Name	Balance	Balance	Balance	Balance	Rate	Date	Holding Value				
Share Pro		13- II	NE081A01020	TATA STEEL	100.000	0.000	0.000	100.000	125.9000	12-	12590.0000000				-

In the above screen, the holding of the Demat accounts are shown. If The Client has holding value, then the stamped and signed copy of the Client Master of the target DP has to be mandatorily uploaded. Also the Client has to upload his/her signature using the Signature upload button.

9. In the next page, Client has to agree on the Terms and Conditions by clicking on the checkbox at the bottom side of the page and click on "Continue to Close" button. Before clicking Continue Button, Client can download the unsigned PDF by clicking on "Preview PDF" and verify all the information and documents entered by him/her are correct or not.

Choose Account	Trading account	Depository account	Finish
Legal terms and conditio	ns		
	Clie	ent Consent	
abide by the provisions of SEBI Circular No. Clf reasons to the other party, after giving notice in v intitled into prior to the termination of this relation	RMIRSD/16/2011 dated 22nd. August@2011 whereby the writing of not less than one month to the other parties. Not rship shall continue to subsist and vest in/be binding of the	Stock broker, Authorized person and the client shall be entitled to to withstanding any such termination, all rights, liabilities and obligatio e respective parties of his/its respective heirs, executors, administra be.	erminate the relationship between them without giving any is of the parties arising out of or in respect of transactions tors, legal representatives or successors, as the case may
	Cons	sent of E-sign	
l autho	rize SMIFS Limited to e-sign my account closure form and	d proof documents submitted by me (if any) using OTP against my A	adhaar number.
Please read these Terms of Service carefully be	efore accessing or using our website or services. By acces conditions of this agreement, then	ssing or using any part of the site, you agree to be bound by these you may not access the website or use any services.	ferms of Service. If you do not agree to all the terms and
Any new features or tools which are added to to change or replace any part of these Terms of Ser	he current site shall also be subject to the Terms of Servic rvice by posting updates and/or changes to our website. It posting of any changes	e. You can review the most current version of the Terms of Service is your responsibility to check this page periodically for changes. Yo constitutes acceptance of those changes.	at any time on this page. We reserve the right to update, our continued use of or access to the website following the

10. Once Client is satisfied with the information he/she has put in, "Continue to Close" button is to be clicked, Client reached the "Validate OTP" page. One OTP goes to the Client's registered Mobile no. and Email ID for confirmation of the Closure.

	<u> </u>		_
Choose Account	Trading account	Depository account	Finish
Validate OTP			
OTP successfully sent to your	r mobile number [9*******9] and email id		
[Kd	.comj.		

11. Client has to put the received OTP in the below page:

- 12. IF the OTP is validated successfully, Client will proceed to the e-sign page of Protean eGov Technologies.
- 13. Then, Client has to click the check box to authorise Protean eGov Technologies for e-signing the Request form using Aadhaar no and type his/her Aadhaar no. in the proper place on the screen.
- 14. The Client will receive an OTP on the Mobile linked to the Aadhaar No. entered.
- 15. Client has to put the received OTP on the screen for OTP validation.
- 16. If OTP validation is successful, then the Closure request form is e-signed and submitted to SMIFS Limited.



- 18. The request form moves to the Admin module of the application where the Admin person verifies the request and after all necessary checks and actions, the request is accepted or rejected in the Re-KYC admin module by the Admin user
- 19. An email immediately goes to the Client informing the acceptance or rejection of the request with cause for rejection of the request, in case of rejection.