



## WhatsApp service for Distributors

### Authentication Procedure:

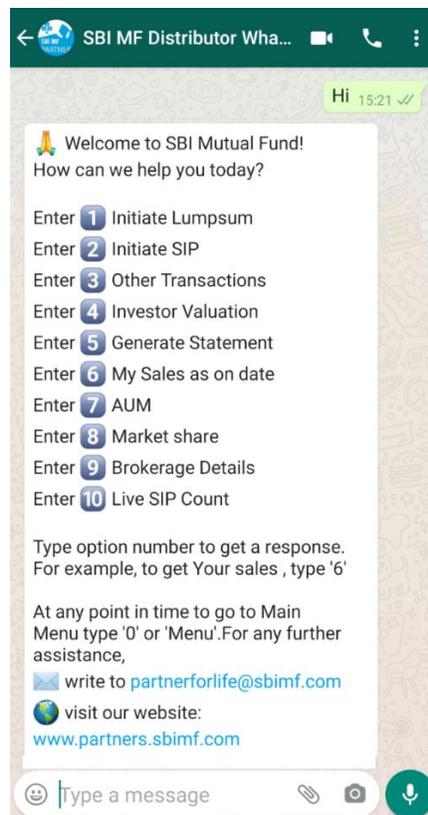
Distributor has to type message 'Hi' to Distributor WhatsApp number 7208017353 from WhatsApp with mobile number linked to his ARN number.

- ✓ **ARN holder** has to enter his ARN number and will be able to access from WhatsApp if his mobile number is registered to his ARN number with CAMS and is empaneled with SBIMF.
- ✓ **EUIN holder** has to enter his EUIN number and will be able to access from WhatsApp if his mobile number is registered to his EUIN number with CAMS. Alternatively, ARN can grant access to EUIN by adding EUIN's mobile number in partner portal.



### List of services being provided:

Only after mobile number linked to ARN number is authenticated with WhatsApp number (on real-time), distributor will be able to access his sales summary details and also initiate transactions for investors who are linked with his ARN.



## For servicing Investors

All investor related services are available only for investments and folios that are done through ARN code. Distributor has to enter investor's PAN to start these journeys of initiating Lumpsum, SIP, SWP, Switch, STP, generating account and capital gain statements, and to view investor's valuation.

### 1,2: For initiating Lump sum, SIP:

- Distributor enters investor's PAN number and gets list of investor's folio(s) which are linked with this ARN; If no investments are found with this combination, Appropriate message is shown
- Distributor selects a folio and inputs required scheme details, EUIN details, Amount, Frequency etc. and submits transaction
- Transaction gets initiated and link sent to investor's email ID and mobile number
- Investor opens the link in browser and completes the transaction
- **Distributor/ EUIN can select investor by directly entering folio number**
- **Distributor/ EUIN can initiate transaction for investors without pre-condition of ARN linked to investor. For this, user has to directly enter folio number to start investment.**

A blue banner with the word "NEW" in white capital letters.

### 3: For Switch, STP, SWP:

- Distributor enters investor's PAN/ Folio number and gets list of investor's folio(s) which are linked with this ARN; If no investments are found with this combination, Appropriate message is shown
- Distributor selects a folio to view schemes in that folio which are linked to this ARN and are having clear units, and selects the From Scheme
- Distributor inputs required target scheme details, EUIN details, Amount/units, Frequency etc. and submits transaction (Only Amount/units required for SWP)
- Transaction gets initiated and link sent to investor's email ID and mobile number
- Investor opens the link in browser and completes the transaction

### 4: Generate Statements:

- Distributor enters investor's PAN number and gets list of investor's folio(s) which are linked with this ARN
- Distributor selects the folio and selects the period for which he wants to generate Account/ Capital gains statement for investor email
- On submission, statement is sent to investor's mail ID

### 5: Investor Valuation:

- Distributor enters investor's PAN number and gets list of investor's folio(s) which are linked with this ARN and also the amounts of investments as a folio wise summary; If no investments are found with this combination, Appropriate message is shown
- Distributor can select Folio wise valuation where he'll see all schemes in that folio linked to his ARN
- Distributor can select Scheme wise valuation to see consolidated schemes level amounts linked to his ARN

## To analyze Sales summary:

Distributor has to select the options from Menu, and can view below business aspects:

### 6: Sales as on date:

Displays the MTD and YTD Gross and Net sales on selecting this option

**E.g.:**

Your SBIMF net sales:

MTD is Rs 1,925,108.20

YTD is Rs 865,108.20

Your SBIMF gross sales:

MTD is Rs 2,922,480.70

YTD is Rs 2,869,680.70

### 7: AUM:

Displays AUM as on date with total AUM and category wise AUM

**E.g:**

Your total **AUM** as on 22 Apr 2020 with SBIMF is Rs 72,598,840.45.

Your **EQUITY** AUM is Rs 70,163,058.56.

Your **DEBT** AUM is Rs 1,830,282.64.

Your **CASH** AUM is Rs 355,513.49.

### 8: Market Share:

Get Market share for your region on selecting this option

Output:

In Mumbai, you have a market share of 4.70% in A U M, 1.80% in number of S I P s and 3.30% in gross sales

### 9: Brokerage Details:

Get the brokerage amount details paid for the ARN for latest available month

**E.g.:**

Brokerage paid for Feb-20 is Rs 45,375.00.

### 10: Live SIP Details:

Get active SIPs count and expected inflow amount for your ARN

**E.g.:**

A total of 129 SIP(s) are live. Your expected inflow for the same is Rs 632,900.00

## Other Services

Other than above mentioned main services, distributors can also access services by typing the respective keyword of requirement in their chat box:

- SIP Calculator
- Fund Name to Know Fund details
- Nearest branch
- Exit Load