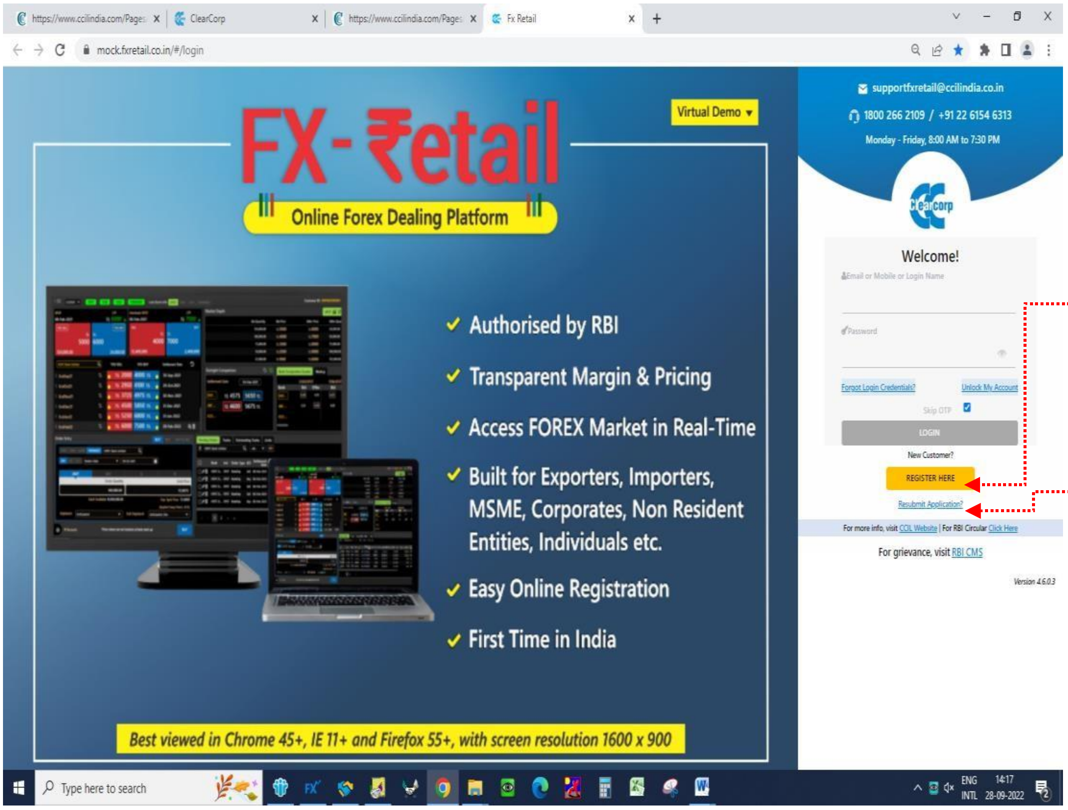
FX-RETAIL Platform Step by Step guide for Customer Registration

Customer need to access the FX-Retail registration link https://www.fxretail.co.in and click on 

button on the page.

**Note: Kindly ensure that details filled at the time of Registration match with the information provided to your Relationship Bank in order to avoid delay in approval or rejection of the Registration by the Bank.



Click on '**Register Here**' to go to Customer Registration Page

Click on '**Resubmit Application**' to resubmit self-withdrawn, Withdrawn by system or Rejected by bank applications. Customers need not re-enter all the details for submission.

1: CUSTOMER PROFILE

The Customer Registration page starts with filling the Customer Profile details. Customer has to select the Customer Type from the dropdown list (out of 29 categories) available. In case of Non-individual category, the Customer profile requires the customer to enter all the mandatory fields (marked in asterisk*) which includes Entity name, PAN number, PAN image upload, Address etc.

Note: In case of Individual customers (viz Individual, NRI, Sole proprietor, HUF), the customer profile requires selection of appropriate customer type

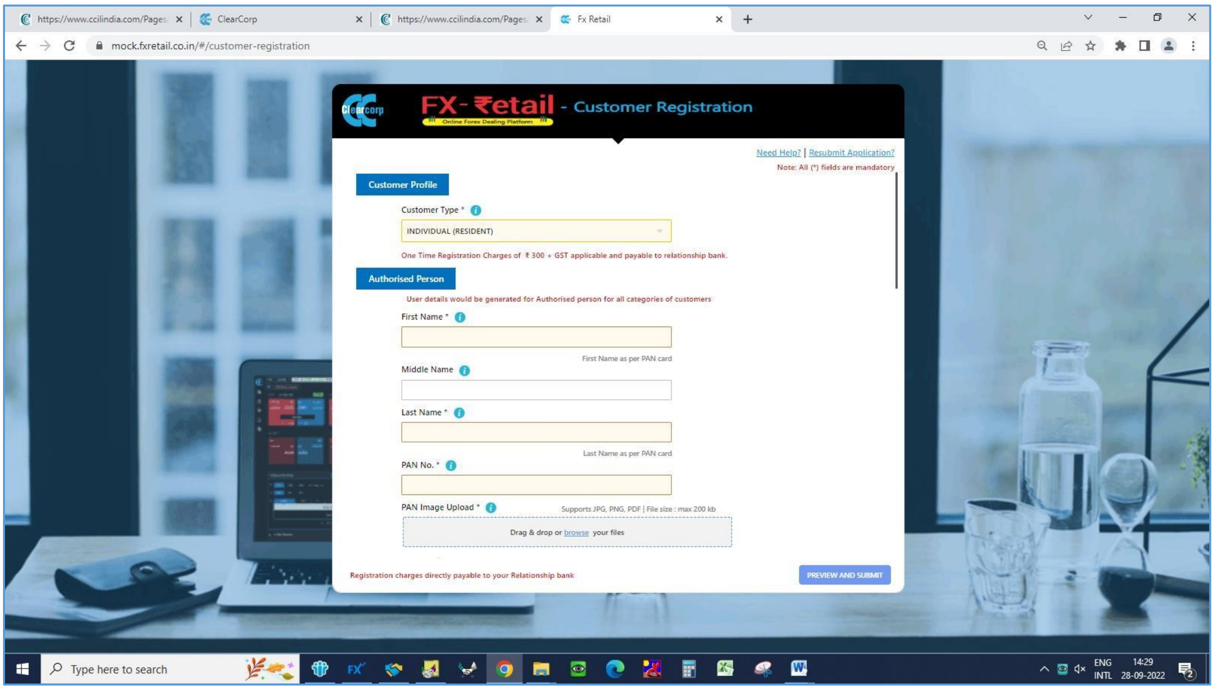


Fig 1. Registration page – Individual category

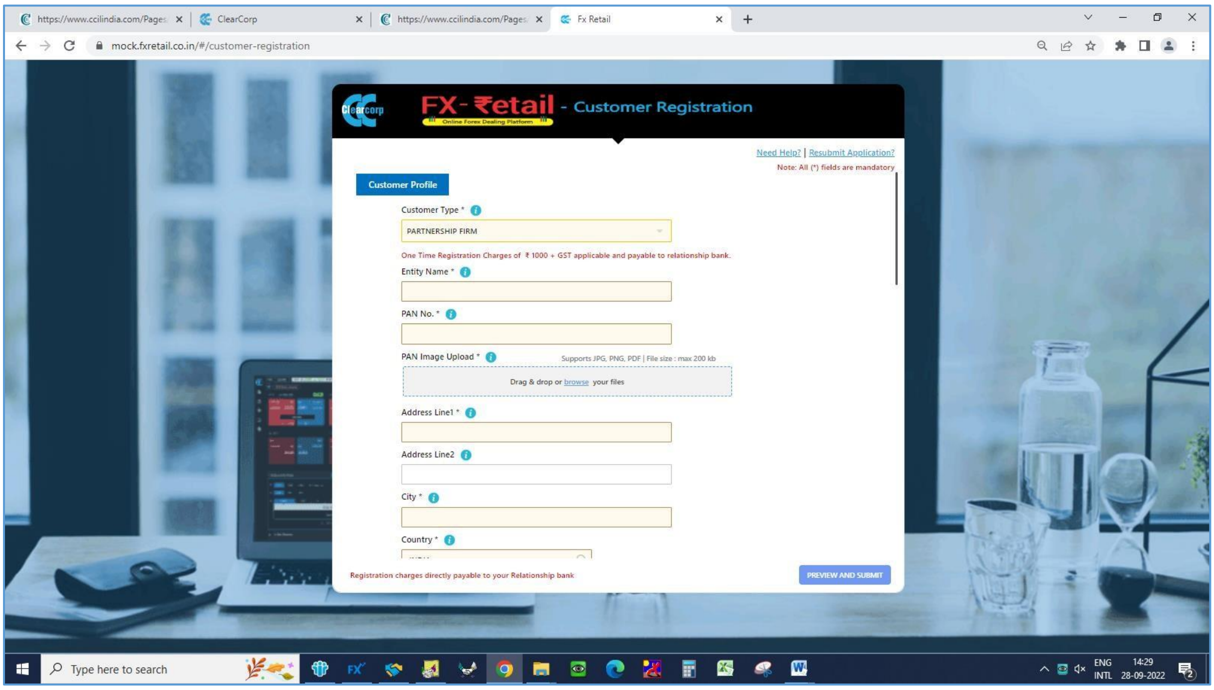


Fig 2. Registration page – Non-individual category

2. AUTHORISED PERSON

In this section, the customer has to enter the Authorised Person information. The user details would be created for the Authorised person for all customer categories. Customer has to click on Generate OTP (One-time password) to verify the Email id and Mobile number. Customers are advised to enter correct **Country Code (viz. 91 for India, 44 for UK) while inputting the**

mobile number. The OTP received on the Email and Mobile needs to be entered in the OTP fields provided in the form.

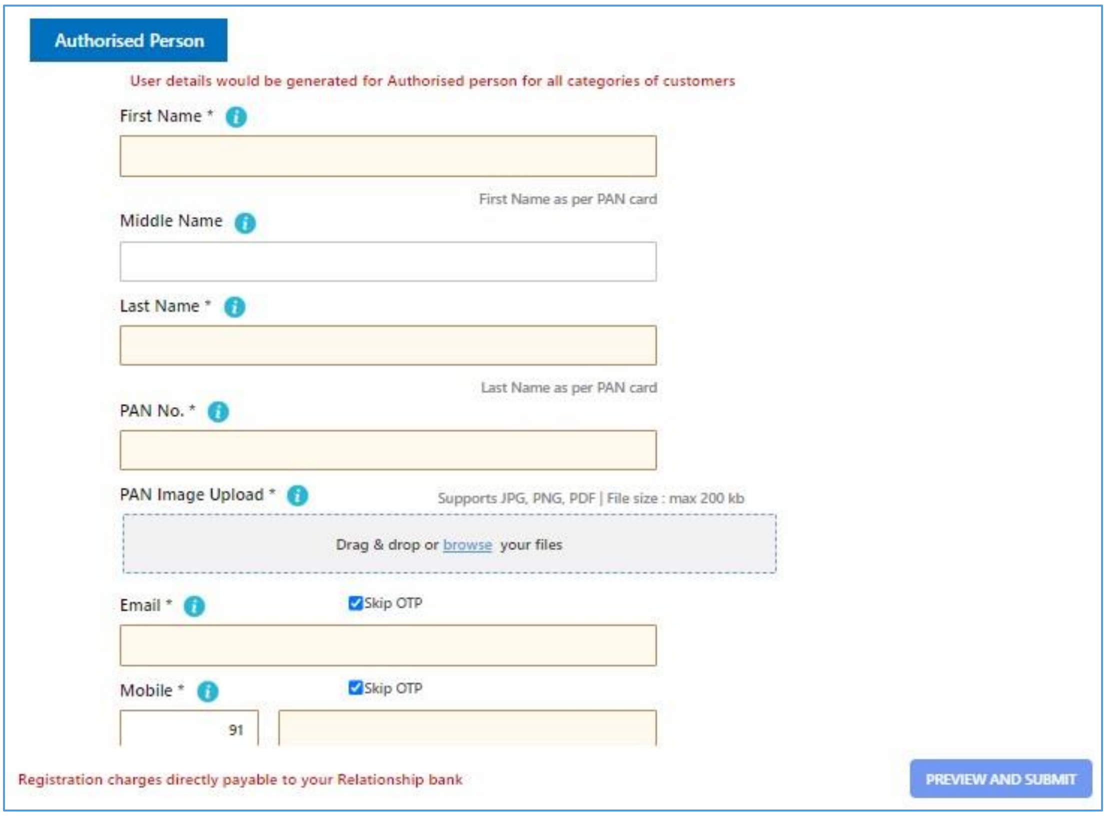


Fig 3. Authorised person – Individual Category

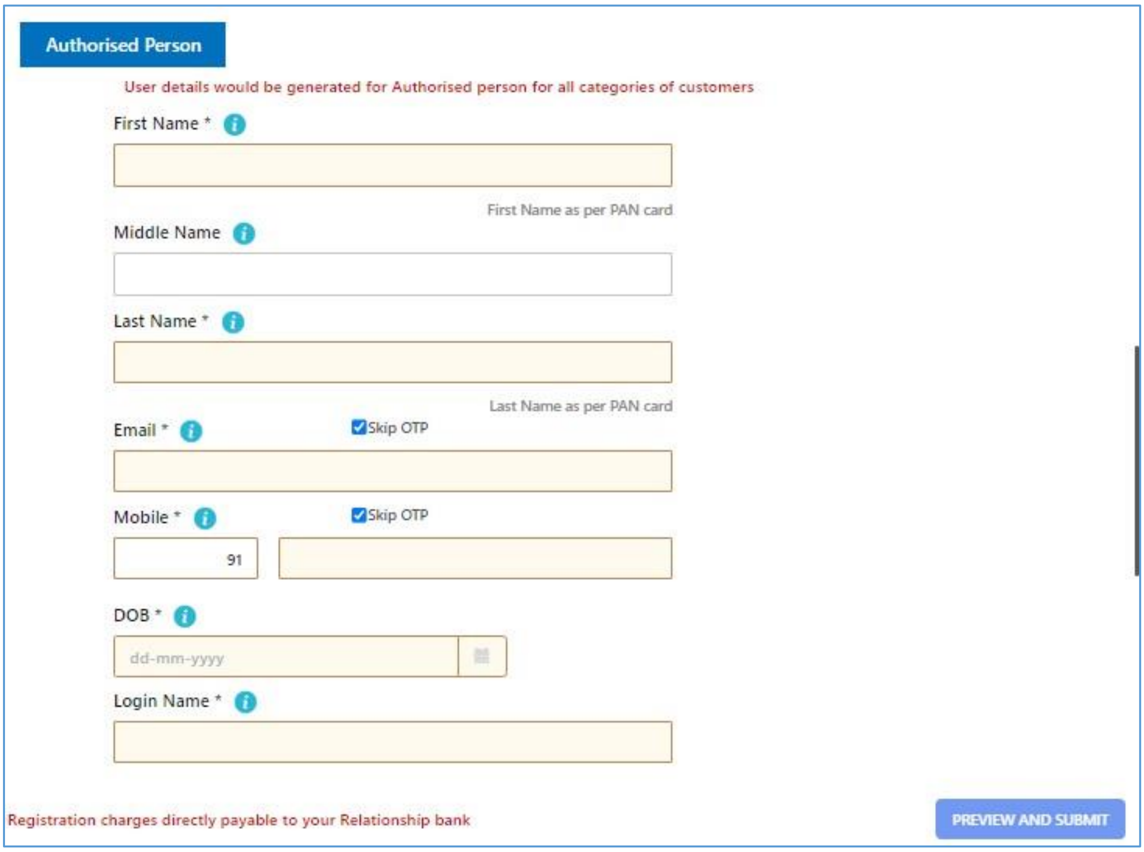
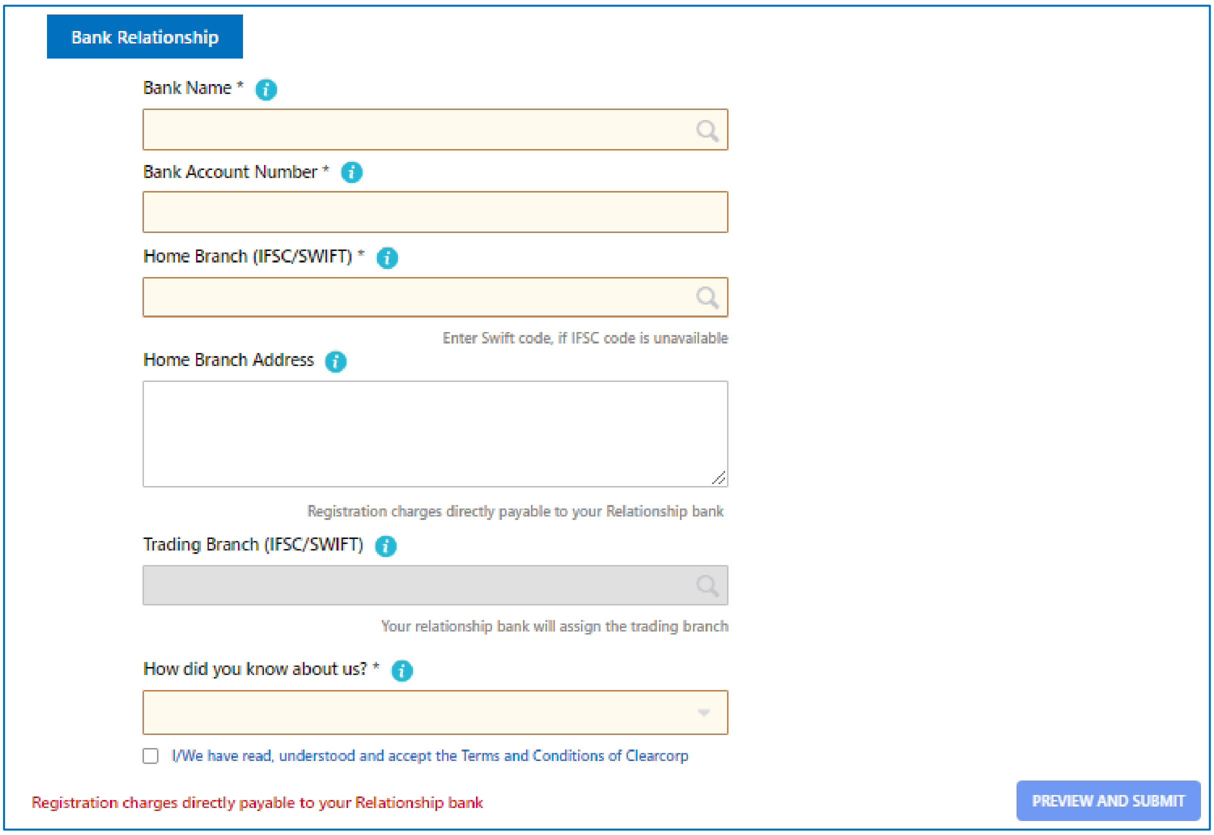


Fig 3. Authorised Person – Non-Individual Category

3: BANK RELATIONSHIP

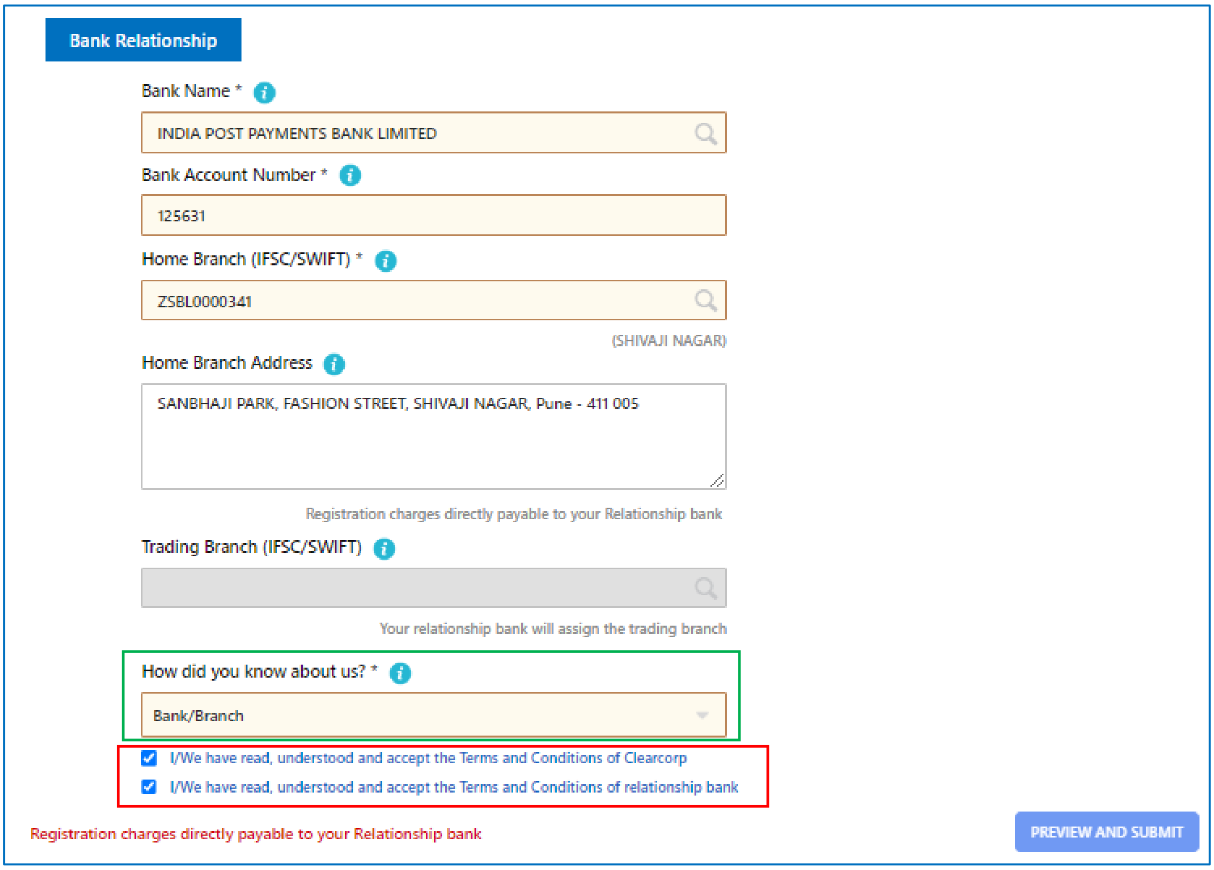
In this section, Customer has to select his Relationship Bank, Home Branch (the IFSC data) and enter the Bank Account Number. The Trading Branch will be assigned by the Relationship Bank.

Note: Home branch is the branch where the Customer maintains the account with the Relationship Bank.



The customer need to select How do you know about us? from the various option in the dropdown list.

The customer needs to click the check box next to “I/We have read, understood and accept the Terms and Conditions of Clearcorp” and “I/We have read, understood and accept the Terms and Conditions of relationship bank” (in case bank has uploaded their Terms & Conditions) and then click on PREVIEW AND SUBMIT as indicated below.



Customer can read and also can take PRINT before acceptance of the terms and conditions.

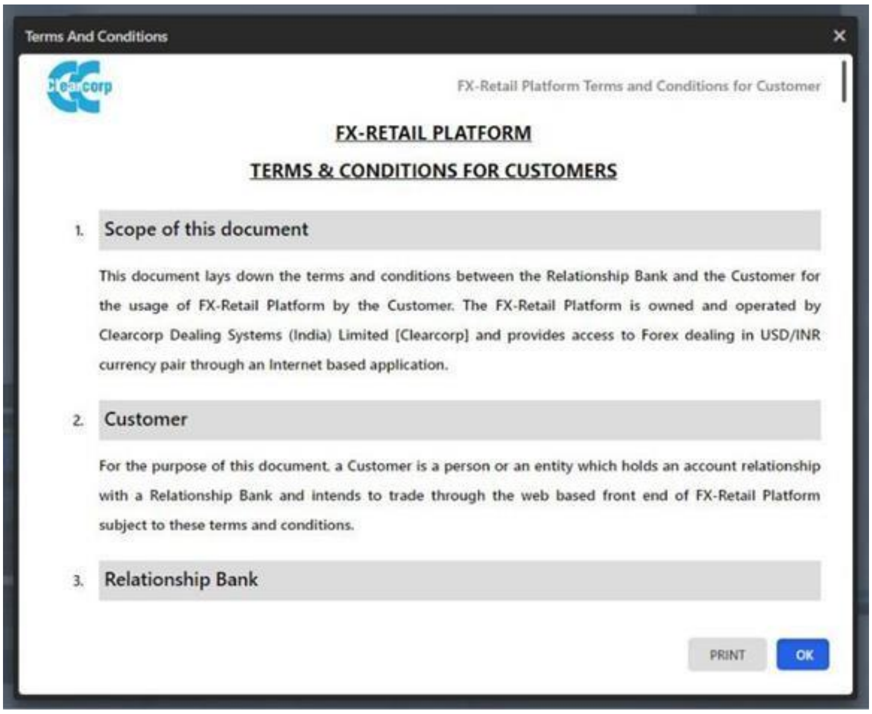


Fig 6. Terms and Conditions

Customer can preview the details by clicking on **Preview and Submit** option. A print option is also provided here. Post submission, Customer would receive a confirmation mail with a reference number.

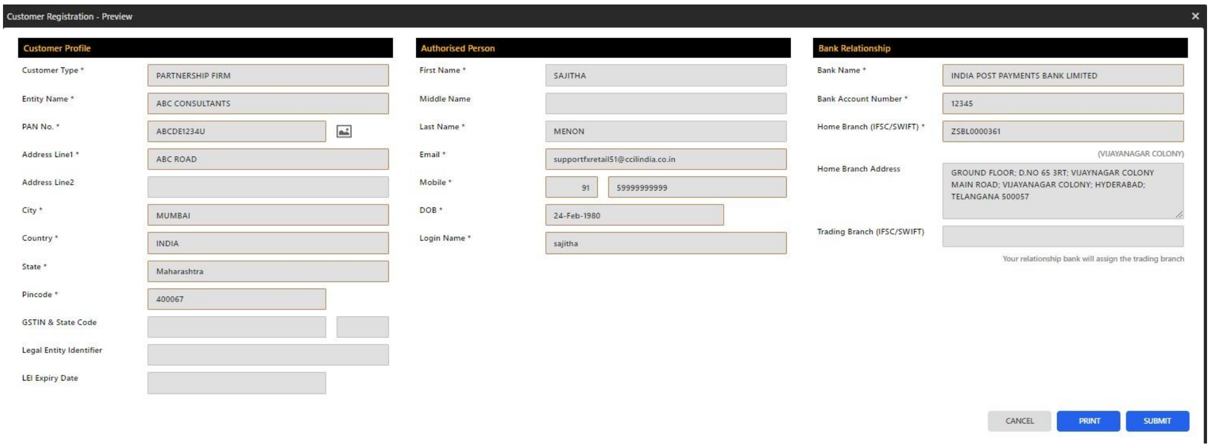


Fig 7. Preview and Submit

Post successful submission of the registration; user would get following confirmation page with application request number

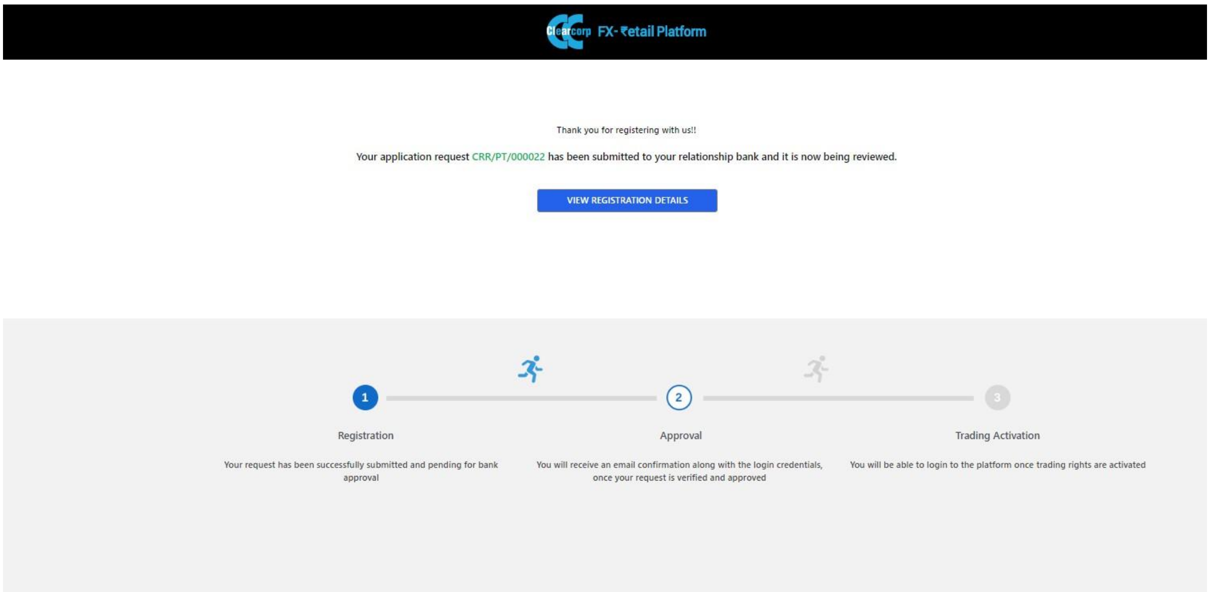
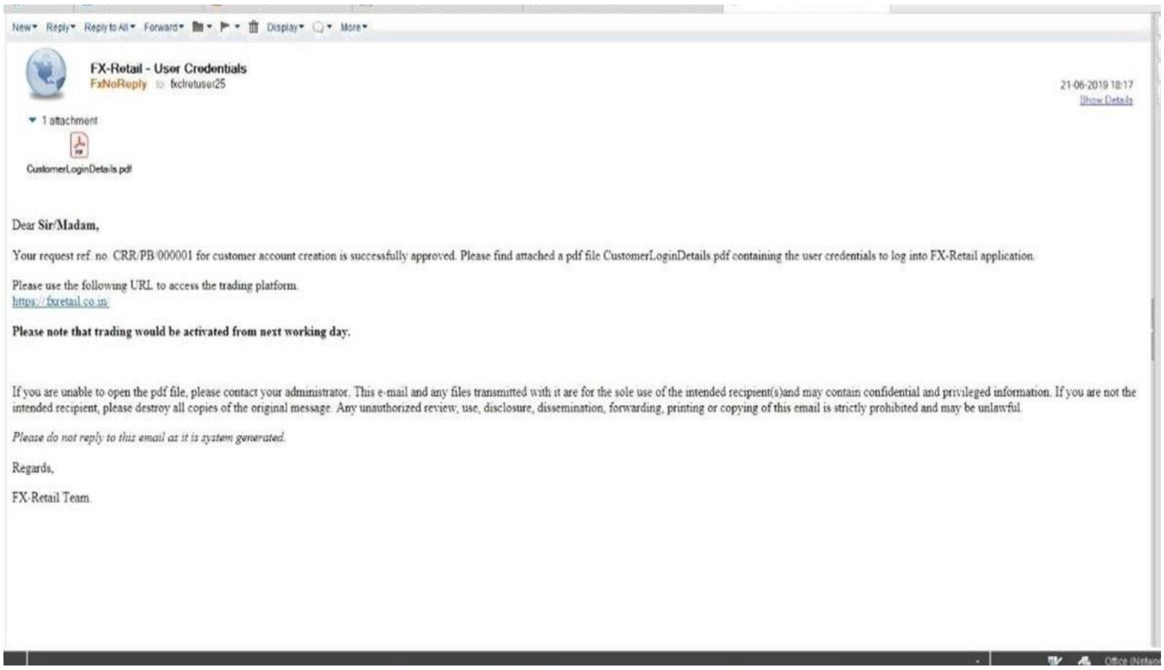


Fig 8. Registration submission

Note: The details shall be forwarded to the relationship bank for approval. On approval, the customer shall receive the user details on the registered email id. The email would also contain a link to the trading platform.


New Reply Reply to All Forward Display More

FX-Retail - User Credentials
FxNoReply to: fxclretuser25

21-06-2019 18:17
Show Details

1 attachment
CustomerLoginDetails.pdf

Dear **Sir/Madam,**

Your request ref. no. CRR/PB/000001 for customer account creation is successfully approved. Please find attached a pdf file CustomerLoginDetails.pdf containing the user credentials to log into FX-Retail application.

Please use the following URL to access the trading platform.
https://fxretail.co.in/

Please note that trading would be activated from next working day.

If you are unable to open the pdf file, please contact your administrator. This e-mail and any files transmitted with it are for the sole use of the intended recipient(s)and may contain confidential and privileged information. If you are not the intended recipient, please destroy all copies of the original message. Any unauthorized review, use, disclosure, dissemination, forwarding, printing or copying of this email is strictly prohibited and may be unlawful.

Please do not reply to this email as it is system generated.

Regards,

FX-Retail Team

Fig 9. Email received post Bank approval

Facility to Re-submit application

The application can be resubmitted when the previous application is

- Rejected by the bank
- Self-withdrawn by customer
- Auto-withdrawn by the system **To resubmit,**

1. Click on the “Resubmit Application?” link given in the login page.

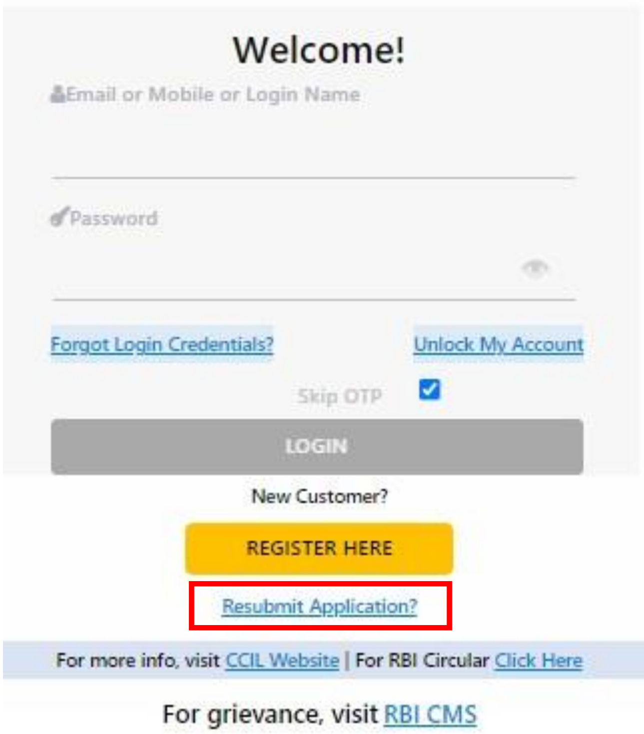
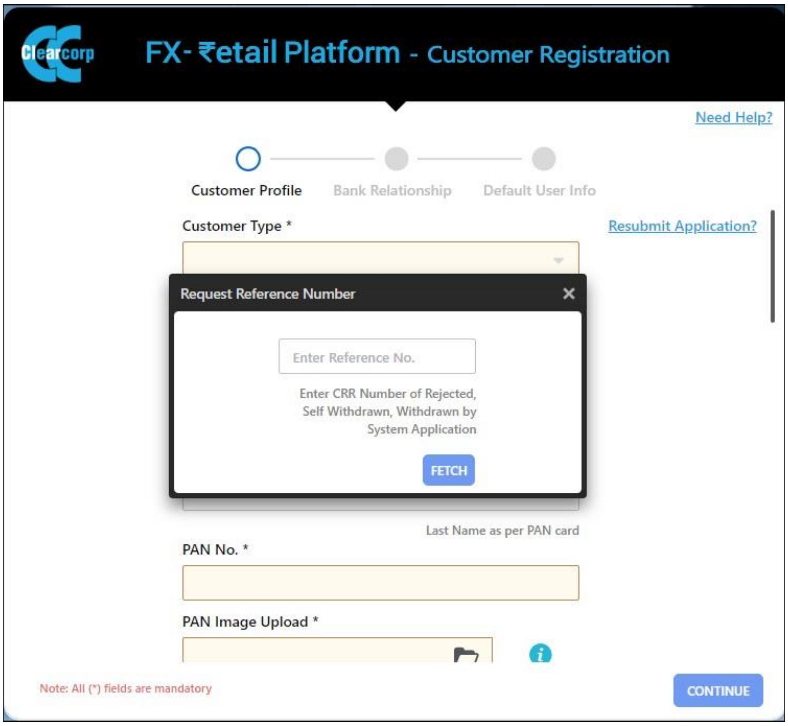


Fig 10. Resubmit Application

2. A pop-up will be displayed on the screen (refer to figure below). Specify the CRR number and click FETCH.



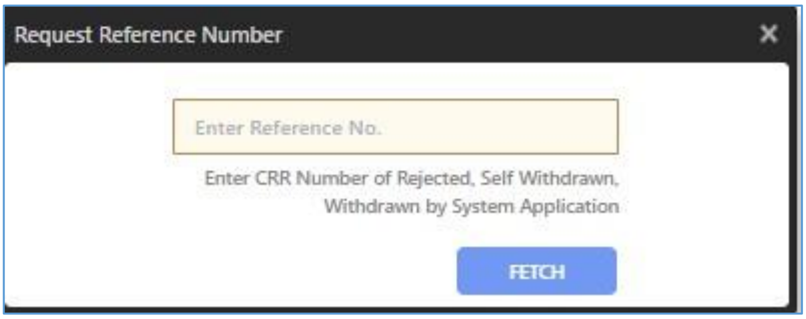


Fig 11. Enter CRR number for Resubmission

3. This will fetch the complete application details. The customer can review and modify the details if required and resubmit for bank approval.

***** FX-Retail Support *****

Email: supportfxretail@ccilindia.co.in

Call us: 1800 266 2109 (Toll Free) or +91 22 6154 6313

(Monday to Friday from 8:00 AM to 7:30 PM on Business Day)