

[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 **REGISTER HERE** 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.

The screenshot displays the FX-Retail website interface. On the left, a large banner for 'FX- ₹etail Online Forex Dealing Platform' lists several benefits: 'Authorised by RBI', 'Transparent Margin & Pricing', 'Access FOREX Market in Real-Time', 'Built for Exporters, Importers, MSME, Corporates, Non Resident Entities, Individuals etc.', 'Easy Online Registration', and 'First Time in India'. A 'Virtual Demo' button is located in the top right corner of the banner. On the right side of the page, there is a 'Welcome!' section with a login form containing fields for 'Email or Mobile or Login Name' and 'Password', along with 'Forgot Login Credentials?' and 'Unlock My Account' links. Below the login form is a 'REGISTER HERE' button, which is highlighted with a red box and an arrow pointing to a callout box. Another callout box points to the 'Resubmit Application?' link below the 'REGISTER HERE' button. The bottom of the page includes a footer with contact information for ClearCorp, including an email address, phone numbers, and operating hours. The Windows taskbar is visible at the bottom of the browser window.

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Click on 'Resubmit Application' to resubmit self-withdrawn, Withdrawn by system or Rejected by bank applications.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

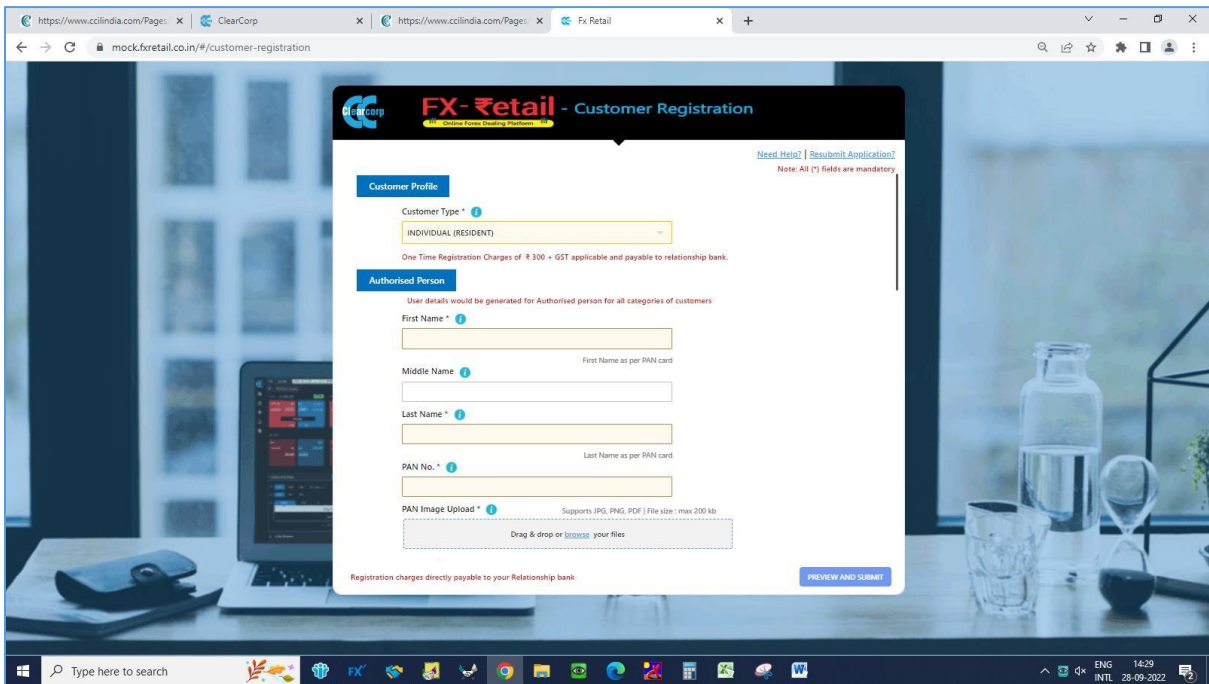


Fig 1. Registration page – Individual category

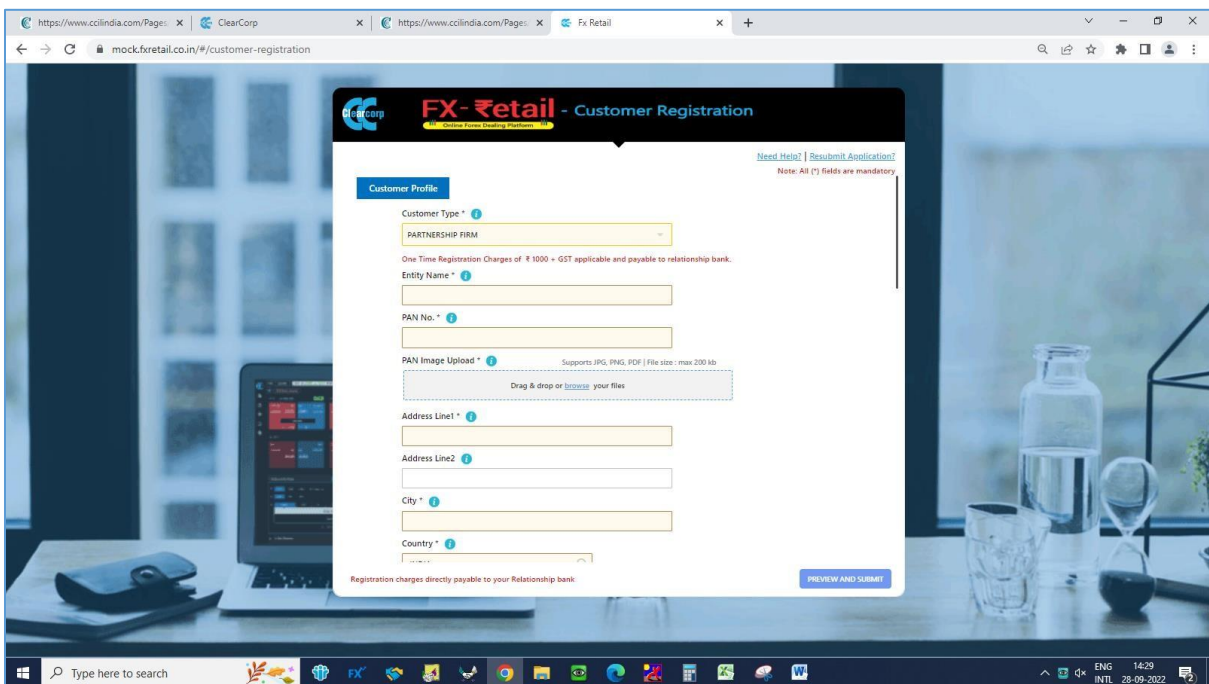


Fig 2. Registration page – Non-individual category

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.

Authorised Person

User details would be generated for Authorised person for all categories of customers

First Name * i

First Name as per PAN card

Middle Name i

Last Name * i

Last Name as per PAN card

PAN No. * i

PAN Image Upload * i Supports JPG, PNG, PDF | File size : max 200 kb

Drag & drop or [browse](#) your files

Email * i Skip OTP

Mobile * i Skip OTP

Registration charges directly payable to your Relationship bank

PREVIEW AND SUBMIT

Fig 3. Authorised person – Individual Category

Authorised Person

User details would be generated for Authorised person for all categories of customers

First Name * i

First Name as per PAN card

Middle Name i

Last Name * i

Last Name as per PAN card

Email * i Skip OTP

Mobile * i Skip OTP

DOB * i

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 screenshot shows a form titled "Bank Relationship" with the following fields and elements:

- Bank Name *** (with an information icon) - Searchable text input field.
- Bank Account Number *** (with an information icon) - Text input field.
- Home Branch (IFSC/SWIFT) *** (with an information icon) - Searchable text input field.
- Home Branch Address** (with an information icon) - Text area. Below it, a note says "Enter Swift code, if IFSC code is unavailable".
- Trading Branch (IFSC/SWIFT)** (with an information icon) - Searchable text input field. Below it, a note says "Your relationship bank will assign the trading branch".
- How did you know about us? *** (with an information icon) - Dropdown menu.
- I/We have read, understood and accept the Terms and Conditions of Clearcorp**
- Registration charges directly payable to your Relationship bank (displayed in red text).
- PREVIEW AND SUBMIT** button.

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.

Bank Relationship

Bank Name * i

Bank Account Number * i

Home Branch (IFSC/SWIFT) * i
 (SHIVAJI NAGAR)

Home Branch Address i

Registration charges directly payable to your Relationship bank

Trading Branch (IFSC/SWIFT) i

Your relationship bank will assign the trading branch

How did you know about us? * i

I/We have read, understood and accept the Terms and Conditions of Clearcorp
 I/We have read, understood and accept the Terms and Conditions of relationship bank

Registration charges directly payable to your Relationship bank

PREVIEW AND SUBMIT

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

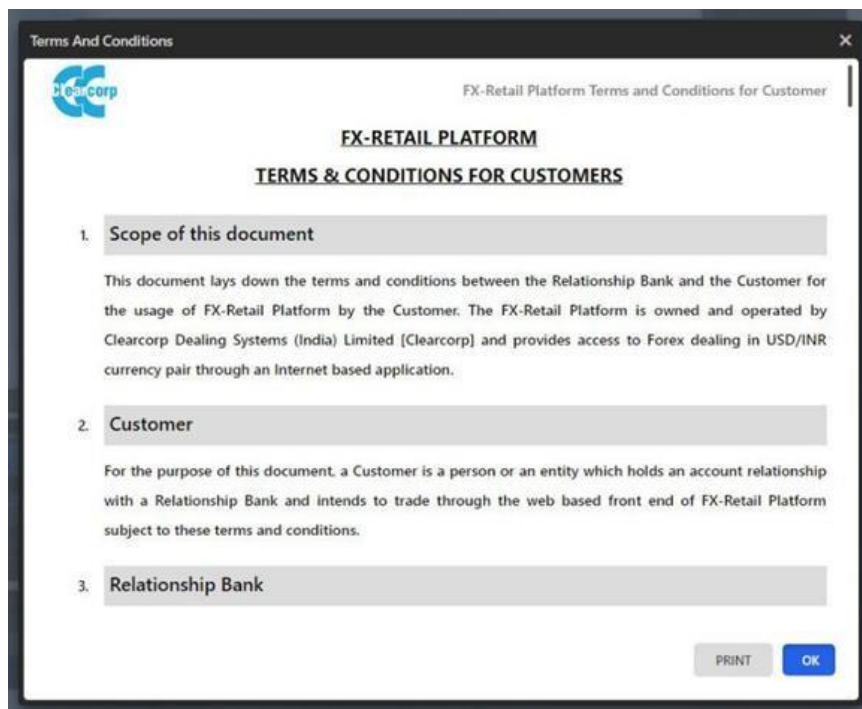


Fig 6. Terms and Conditions

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.

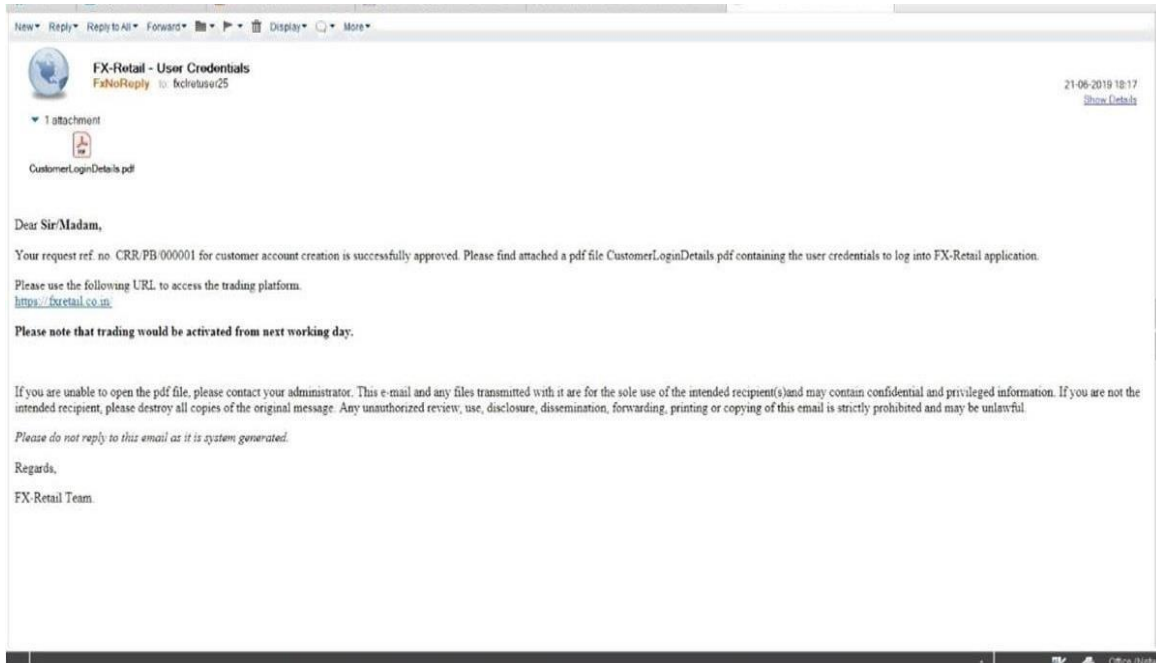


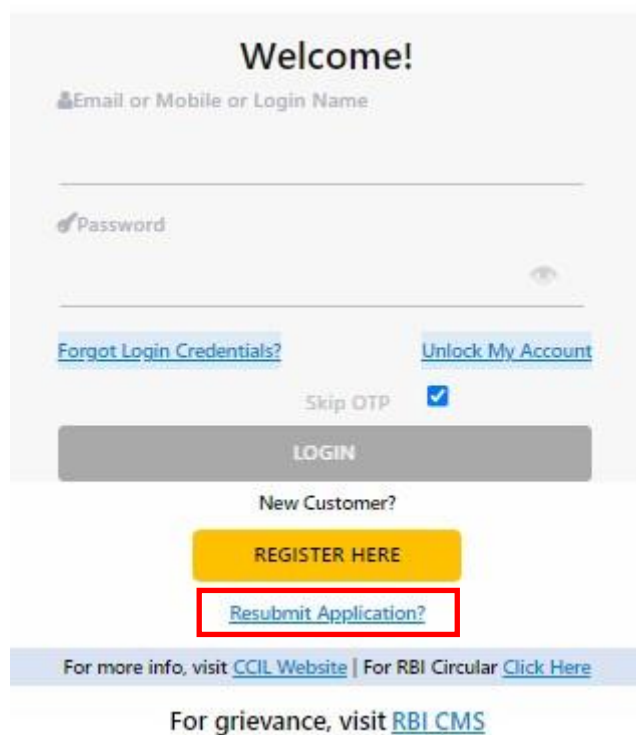
Fig 9. Email received post Bank approval

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.



The image shows a login page with the following elements:

- Header: "Welcome!"
- Input fields: "Email or Mobile or Login Name" and "Password" (with an eye icon for visibility toggle).
- Links: "Forgot Login Credentials?" and "Unlock My Account".
- Checkbox: "Skip OTP" with a checked box.
- Button: "LOGIN" (grey).
- Text: "New Customer?"
- Buttons: "REGISTER HERE" (yellow) and "Resubmit Application?" (blue link, highlighted with a red box).
- Footer: "For more info, visit [CCIL Website](#) | For RBI Circular [Click Here](#)" and "For grievance, visit [RBI CMS](#)".

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.

Clearcorp FX- Retail Platform - Customer Registration

Need Help?

Customer Profile Bank Relationship Default User Info

Customer Type * [Resubmit Application?](#)

Request Reference Number

Enter Reference No.

Enter CRR Number of Rejected, Self Withdrawn, Withdrawn by System Application

FETCH

PAN No. * Last Name as per PAN card

PAN Image Upload *

Note: All (*) fields are mandatory

CONTINUE

Request Reference Number

Enter Reference No.

Enter CRR Number of Rejected, Self Withdrawn, Withdrawn by System Application

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 *****

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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)