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Login to new ICICIdirect.com website and click on Mutual Funds

The screenshot shows the top navigation bar of the ICICIdirect.com website. The 'Mutual Funds' link is highlighted with a red dashed box. Below the navigation bar, there is a secondary menu with options like 'Purchase / SIP', 'One Click Investment', 'SIP Protect', 'Freedom SIP', 'Place TIP', 'Buy NFO / FMP', 'Buy ETF', 'Unit Holding', 'Manage Bank A/c', 'SIP Book', and 'Order Book'. A search bar for funds is present, along with 'Buy' and 'SIP' buttons. On the right, there are buttons for 'My Portfolio' and 'Unit Holdings'. Below the search bar, there are tabs for 'Recommended Funds' including 'Equity', 'Debt', 'Hybrid', 'Others', 'Most bought Funds', and 'Funds of the Month'. A section titled 'Other Investment Ideas' contains a link to 'Research recommended funds'.

2

Click on "Manage Bank A/c"

The screenshot shows the same website interface as above, but with the 'Manage Bank A/c' link in the secondary menu highlighted with a red dashed box. The 'Mutual Funds' link in the top navigation bar is also underlined. The rest of the page layout, including the search bar, recommended funds, and other investment ideas, remains the same.



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In the Manage Bank A/c section, click on "Add Bank Account"

Equity Mutual Funds F&O Commodity Currency FD/Bonds Insurance NPS IPO Global Investment Loan Portfolio Research Markets More ▾

Purchase / SIP | One Click Investment | SIP Protect | Freedom SIP | Place TIP | Buy NFO / FMP | Buy ETF | Unit Holding | Manage Bank A/c | SIP Book | Order Book [+]

Your Registered Bank Account Add Bank Account NET Banking/One time Mandate Transaction PG Transactions

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Select "Register a Mandate"

Your Registered Bank Account Add Bank Account NET Banking/One time Mandate Transaction PG Transactions

Register your Bank account to enable transactions in your Investment account using the following options :

<input checked="" type="radio"/> Register a Mandate		<input type="radio"/> Enable Unified Payment Interface(UPI)		<input type="radio"/> Enable Net Banking Facility	
<p>Preferable for seamless investments of SIP/TIP installments</p> <ul style="list-style-type: none"> <li>You can register a Mandate with e-Mandate route using your net-banking or debit card credentials for interbank electronic transaction. This is a completely paperless process. You can also register a Mandate with web based solution i.e. NACH where you need to submit the auto generated mandate form to us.</li> <li>Note – If the bank is from the list of 'Net Banking' enabled banks then on activation of Mandate, 'Net Banking' facility will also be enabled for that bank account. List of banks eligible for Mandate</li> </ul>	<p>Preferable for both One Time and Systematic investments of Mutual Funds and NPS.</p> <ul style="list-style-type: none"> <li>You can register an Unified Payment Interface (UPI) online. This is an one time requirement.</li> <li>Post registration you will be able to make both One Time and Systematic investments in Mutual Funds and NPS.</li> <li>You can also transfer funds via IMPS/NEFT/RTGS after registering your UPI ID.</li> <li>Note – You have to authenticate the payment notification on your UPI linked Mobile App for all transactions</li> </ul>	<p>Preferable only for lumpsum Investments.</p> <ul style="list-style-type: none"> <li>Registering a bank account from the list of eligible banks enables you to invest in various financial products from your bank account using Payment Gateway</li> <li>If you hold ICICI bank account you can register your bank account using online option in next page</li> <li>You can also register your bank account from the list of eligible banks by uploading your cancelled cheque leaf</li> </ul>			



**Mandate Registration**

**Bank Account Details**

Bank Name: UNION BANK OF INDIA  Bank A/c No.

Your existing mapped Bank Accounts

Bank A/c	IFSC	MICR	Action
XXXXXXXXXXXXXX	UBIN0530123	XXXXXXXXXX	<a href="#">Click here</a> to set up mandate in this bank a/c

IFSC Code  MICR Code  To Debit  SB  CA

Bank A/c Category  Single  Joint

If you have any bank account of the selected bank already linked through **UPI OR PG Net-banking** then it will be shown here.

If you want to set up Mandate on the same bank account then by clicking here, all the details like A/c number, IFSC, MICR etc. will be auto filled.

Else, follow step given in next slide.



To view list of bank account enabled for E-Mandate, please [click here](#).

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## Provide all the details of new/different bank account

**Mandate Registration**

**Bank Account Details**

Bank Name:

Bank A/c No.:

IFSC Code:

MICR Code:

To Debit:  SB  CA

Bank A/c Category:  Single  Joint

If you want to add any different/new bank account then enter all the required details

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## Provide Mandate amount, select E-mandate & default value check box option and click on Proceed

**Mandate Details**

Amount:

Amount in Words:

This is the maximum amount you authorise to debit for each transaction. This amount should be 5000/- or above (Upto Rs. 1 Crore)

The default value for the One time Mandate are

- Frequency - "As & when presented",
- "Debit Type" - "Maximum Amount" and
- "Period" - "Until Cancelled"

I want to set up E-Mandate using Net-banking credentials  
(This is a complete online process)

I want to set up the Mandate in offline mode  
(You have to send the physical form to us)

**Personal Details**

A/c Holder Name:  Mobile No.:  Email ID:

as per record in ICICI Direct

Your Name in ICICI Direct trading a/c will be matched with your name in bank account that you want to map. If the Name does not match then you can not set up the mandate through E-mandate route.

Personal details will be auto populated

E-Mandate option will be shown if the same is available for the selected Bank. You need to enter Mandate amount, select the E-Mandate option and check box for default values and click on "Proceed".

If the selected Bank does not provide E-Mandate options then customer has to set up the mandate in offline mode



To view list of bank account enabled for E-Mandate, please [click here](#).

Verify the details provided, accept T&C and click on Confirm

**Mandate Confirmation**

Verify your details and confirm

Bank Name	UNION BANK OF INDIA	IFSC Code	XXXXXXXXXX
MICR Code	XXXXXXXXXX	Mobile No.	XXXXXXXXXX
Email Id	XXXXXXXXXX	To Debit	SB
Bank A/c No.	XXXXXXXXXX	A/c Holder Name (as per bank records)	XXXXXXXXXX
Amount	5000	Amount in words	Five Thousand
Bank A/c Category	Single		
Frequency	As & when presented	Debit Type	Maximum Amount
Period	Until Cancelled	Mandate Mode	Online

I Accept the [Terms & Conditions](#)

**Confirm** **Back**

You will be shown confirmation screen to recheck the details provided. Accept the T&C and click on Confirm.

On Proceed (for new bank accounts) **the system will do a penny drop and match Customer's Name** (Matching the name in ICICIdirect a/c and in Bank a/c) in the backend. This is as per Anti Money Laundering (AML) guidelines. On successful match, system will take customer to next page. If Name doesn't match, then system will ask customer to set up mandate in offline mode (existing NACH Mandate)



Click on “Register Now” in the pop up window to go back to Bank’s Net Banking Page. Provide details in Net banking Page of your bank to complete E-mandate setup

The screenshot shows the ICICI Direct website interface. At the top, there are market indices: NIFTY (11,513.05) and SENSEX (38,903.30). A search bar and navigation menu are visible. The main content area is titled "Your Registered Bank Account" and "Add Bank Account". A pop-up window is overlaid on the page, displaying the "Digital Mandate" registration details. The pop-up window has a blue header with the ICICI Direct logo and a security notice: "Your information is secured using industry standard encryption". Below this, the "MANDATE DETAILS" section is shown with the following information:

MANDATE DETAILS	
Start Date	End Date
26-08-2020	26-08-2119
Amount Type	Frequency
Variable	As and when presented
Max Debit Amount	
5000	
Utility number	

The "Register Now" button at the bottom of the pop-up window is highlighted with a red dashed box. The background page shows options to "Register a Mandate" and "Enable Net Banking Facility".

Simply click “Register Now” in this pop up. No need to enter Email ID, PAN etc. in this page.

Hereafter on clicking “Register Now” you will be taken to your Bank’s Net-banking page and post successful authentication you will be taken back to ICICIdirect website page with Success Message (subject to net-banking authentication is successful) . Customer can set up systematic investments using the Mandate immediately.

To read FAQs related to E-Mandate, please [click here](#).

