

yono Business – User Manual

yono Business – Additional Subscription

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3. Post Login Features

Post successful login to yono Business, system will redirect the corporate user to yono Business landing page. Corporate User will be able to:

- Subscribe to other products:

This feature is enabled only to the Corporate users with Administrator role to subscribe for other corporate products such as CINB, eTrade or eForex

3.3 Post Login Subscription

Post login subscription is a feature available only to a corporate user with administrator role to subscribe for other products such as eTrade or eForex based on the existing facilities in yono Business.

Pre-condition to subscribe the product:

- 1) Logged in user has to subscribed for CINB and intends to subscribe for another one by clicking the respective menu. (E.g. eTrade+ or eForex+)
- 2) Only users with Admin role of CINB will have access to subscribe for any of the product listed below:

The **process of post login subscription** includes capturing of details specific to products such as:

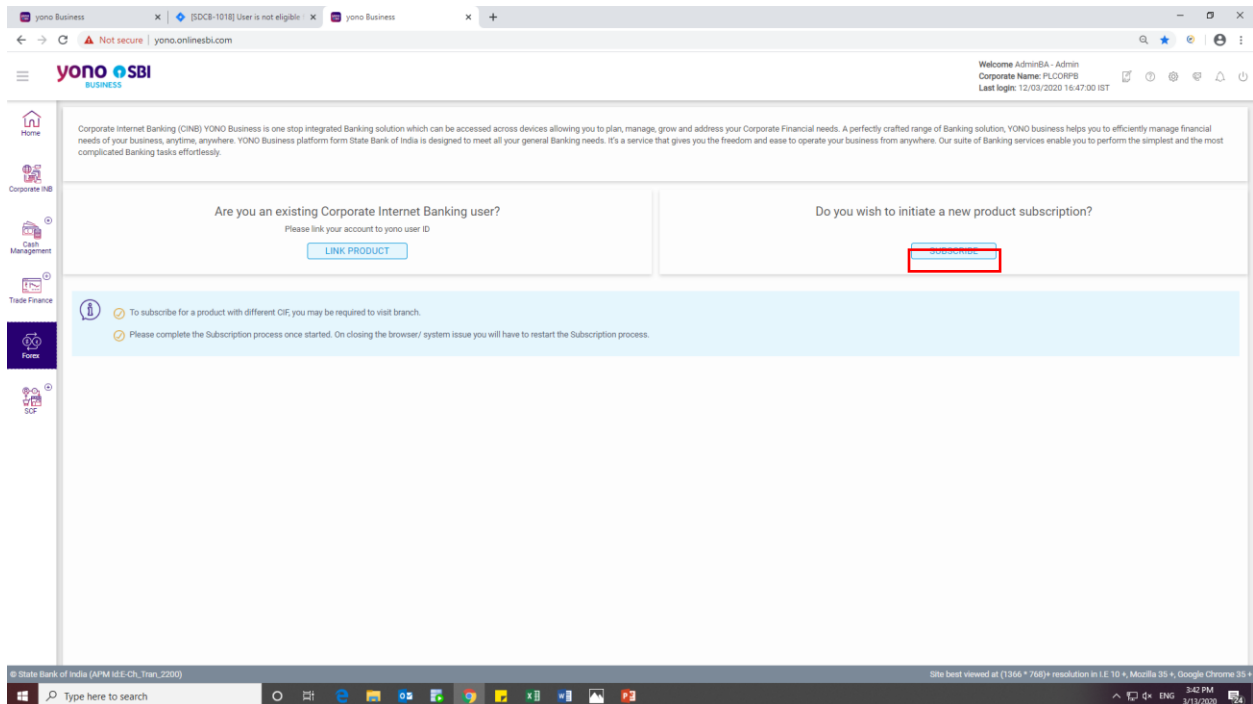
- Select Product (One of eTrade or eForex)
- Input Criteria to fetch product details:
 - Account Number &
 - Select Branch (Applicable only to eTrade or eForex product)
- Fetch Corporate details,
- Capture Admin details (Nominate - Self or Other Admin or New Admin)
- Capture Transaction User Details
 - Checker details (Applicable only to Corporate Internet Banking product)
 - Capture eForex User details (Applicable only to eForex product)
- Preview & Submit
- Download Omnibus Document
- Submit all the following documents duly signed by appropriate signatories to Branch:
 - Omnibus Document
 - Board Resolution (wherever applicable)
 - Agreement cum Indemnity Bond for eTrade product and Indemnity Bond for eForex product
 - KYC Document (wherever applicable)
- Branch user to upload the above set of scanned documents and approve.
- Post approval, SMS is sent to the user with role such as Administrator, Transaction User (Checker or eForex User) for user activation – new user creation or linking of existing yono Business credential
- The respective user to complete the process of [New User Activation](#) in yono Business.

Action1: Subscribe Product

Post Successful login to yono Business, and if user has already subscribed for CINB and want to subscribe eForex product.

User has to select eForex (+) from main menu, system will ask user to 'Subscribe' for new product subscription

Figure 3.1: yono Product Subscription - Subscribe Product



Action2: Fetch Corporate Details

System will fetch all the A/c numbers & associated CIF mapped to the logged in Admin.

Display a/c no as dropdown e.g. If logged in admin is CINB, a/c number dropdown to be populated with a/c no. associated with logged in CINB admin under that Corporate ID

Figure 3.2: yono Product Subscription - Fetch Account Number

The screenshot shows the 'yono SBI BUSINESS' interface. On the left is a sidebar with icons for Home, Corporate INB, Cash Management, Trade Finance, and Forex. The top navigation bar includes the yono SBI logo and a user welcome message: 'Welcome ANONBAdmin5 - Admin', 'Corporate Name: CORPVIS ONE', and 'Last login: 12/03/2020 19:52:07 IST'. The main content area displays a 'New Product Subscription' form with four steps: 'Corporate Details' (active), 'Choose Administrator', 'Choose e-Forex Users', and 'Preview & Submit'. The 'Account Number' field is a dropdown menu that is currently open, showing a list of account numbers: '00000030002042865', '00000030002043585', and '00000030002043620'. The 'CIF' field is empty.

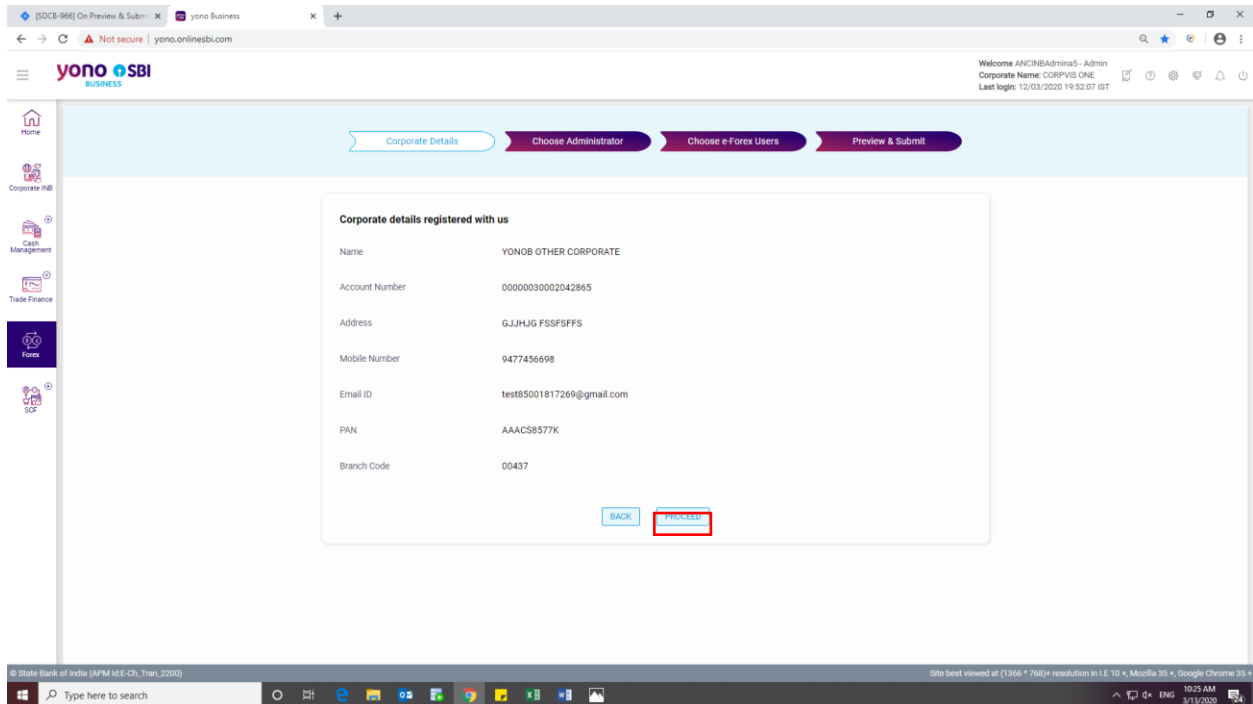
System will provide the associated branch names for the selected account number

Figure 3.3: yono Product Subscription - Fetch Branch

The screenshot shows the 'yono SBI BUSINESS' interface. On the left is a sidebar with icons for Home, Corporate INB, Cash Management, Trade Finance, and Forex. The top navigation bar includes the yono SBI logo and a user welcome message: 'Welcome ANONBAdmin5 - Admin', 'Corporate Name: CORPVIS ONE', and 'Last login: 12/03/2020 19:52:07 IST'. The main content area displays a 'New Product Subscription' form with four steps: 'Corporate Details' (active), 'Choose Administrator', 'Choose e-Forex Users', and 'Preview & Submit'. The 'Account Number' field is a dropdown menu with the value '00000030002042865'. The 'CIF' field is a text input with the value '00000085001817269'. The 'eForex Branch' field is a dropdown menu with the value 'NASIK (TREASURY BRANCH)-00437'. The 'eForex Branch' field is highlighted with a red box.

On click of Proceed, System to display Corporate details along with Proceed and Back button

Figure 3.4: yono Product Subscription - Fetch Corporate Details



Note:

1. System will check if the product request has been already raised for the selected account no and show the message “A request to subscribe for this product has already been initiated for the selected account number. Please choose another account number or Visit Branch”
2. Branch Name will display only if user is subscribing for eTrade or forex, in case if CINB, branch name will not be displayed.

Action3: Choose Administrator

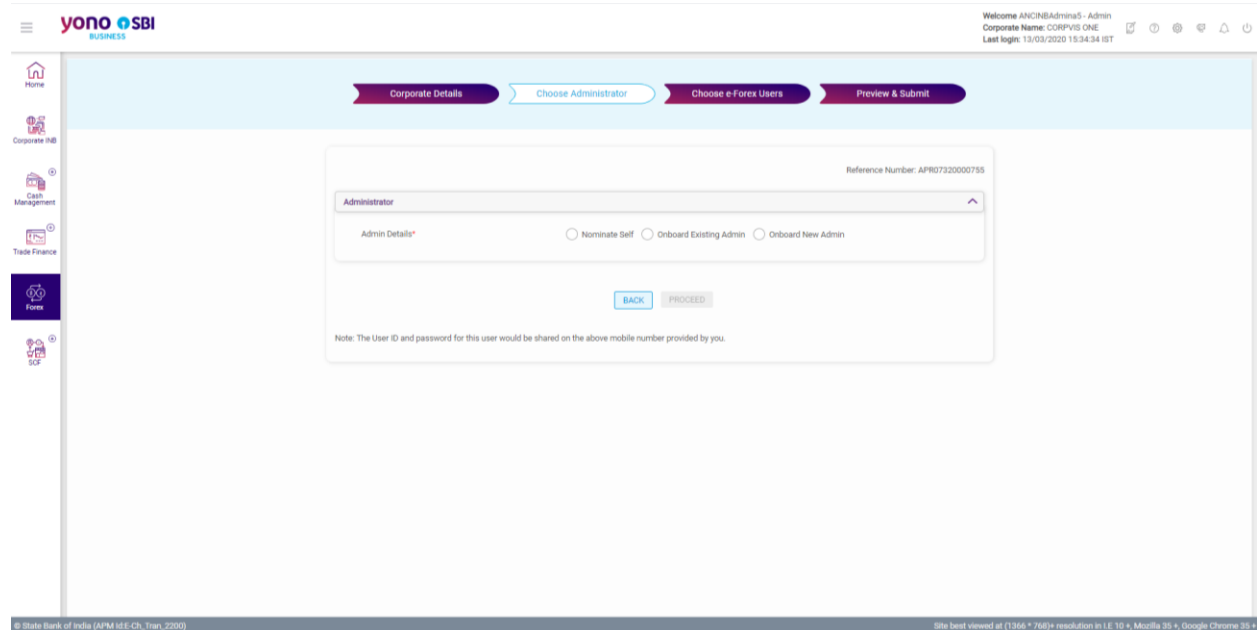
If user is already subscribed for CINB and want to subscribe for eTrade and eForex, then on administrator details page, system will check for Single admin or multiple admin

In case of CINB-Single Admin → no radio buttons to be displayed. System to pre-populate logged in user (Admin) details

System will display the following radio buttons for the User to choose,

#	Choose Admin	Description	Applicable for Corporates with
1	Nominate Self	The logged in administrator is nominating self as an admin of the product selected for subscription (e.g. eTrade+ & eForex+)	Single admin or Multiple admin
2	Nominate Existing Admin	Choose this option to nominate existing admin other than the logged in user.	Multiple admin (only when more than 1 admin already exists)
3	On-board New Admin	The new administrator is required to be created apart from the logged in administrator.	Multiple Admin

Figure 3.5: yono Product Subscription - Choose Administrator



Action3a: On selection of Nominate Self

- System will display logged in Admin details
- On proceed, system will capture the selection and proceed to next page

Figure 3.6: yono Product Subscription – Administrator (Nominate Self)

Administrator

☒ Nominate Self ☐ Onboard Existing Admin ☐ Onboard New Admin

Name Administrator

Employee Number 123456789

PAN* ALMPD3540M

Mobile Number 9619242990

Email ID admin@sbi.com

Address1 Chennai

Address2 Chennai

City Chennai

State Tamilnadu

Country India

PIN Code 600100

[BACK](#) [PROCEED](#)

Note: The User ID and password for this user would be shared on the above mobile number provided by you.

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Site best viewed at (1366 * 768) resolution in 1.6.10 * Mozilla 35 * Google Chrome 35 *

Action3b: On selection of Nominate Existing Admin

- Display drop down- Existing Admin list
- Dropdown- load all the Admins mapped to that Corporate ID of the logged in user
- On selection of name from the dropdown, system will display the details of the Admin
- On proceed, system will capture the selection and proceed to next page

Figure 3.7: yono Product Subscription – Administrator (Nominate existing Admin)

Welcome AdminDA - Admin
Corporate Name: PLCORPD
Last login: 09/06/2020 14:24:12 IST

Corporate Details Choose Administrator Choose e-Forex Users Preview & Submit

Administrator

Admin Details* ☐ Nominate Self ☒ Onboard Existing Admin ☐ Onboard New Admin

Select Admin* AdminDB

Name AdminDB

Employee Number 123456789

PAN FFBPS1893L

Mobile Number 1234567890

Email ID test@gmail.com

Address1 Mumbai

Address2 Mumbai

City Mumbai

State Maharashtra

Country India

PIN Code 400706

BACK PROCEED

Ch_Tran_2200) Site best viewed at (1366 * 768)+ resolution in I.E 10 +, Mozilla 35 +, Google Chrome 35 +

Action3c: On selection of On-board New Admin

- System will display administrator details fields in editable mode
- User to input details
- User can add another Admin to be enabled only if subscribe for CINB
- User can add only one admin to be captured if subscribe for forex or eTrade
- On click of proceed, system will proceed to next page

Figure 3.8: yono Product Subscription – Administrator (Onboard New Admin)

Welcome AdminFA - Admin
Corporate Name: PLCORPF
Last login: 18/06/2020 15:01:58 IST

Corporate Details Choose Administrator Choose e-Forex Users Preview & Submit

Administrator

Admin Details* ☐ Nominate Self ☐ Onboard Existing Admin ☒ Onboard New Admin

Name* TFadmin

Employee Number* 1400000000000000

PAN* ALMPD3540M

Mobile Number* 91

Re-Enter Mobile Number* 91 9619242990

Email ID* tfadmin@gmail.com

Address1* tfadmin-1

Address2 tfadmin-2

City* Mumbai

State* Maharashtra

Country* India

PIN code* 130000

BACK PROCEED

Note: The User ID and password for this user would be shared on the above mobile number provided by you.

Action4: Choose e-Forex User

This step is applicable only for eForex product. System to display radio button to choose how the e-Forex user to be created.

- a) On-board Existing User
- b) On-board New e-Forex User

Figure 3.9: yono Product Subscription – Choose eForex User

The screenshot displays the 'yono SBI BUSINESS' web interface. The top navigation bar includes the logo and a user profile section with the text: 'Welcome ANONBAdmin5 - Admin', 'Corporate Name: CORPUS ONE', and 'Last login: 13/03/2020 15:34:34 IST'. A sidebar on the left contains icons for Home, Corporate HNB, Cash Management, Trade Finance, and Home. The main content area features a progress bar with four steps: 'Corporate Details', 'Choose Administrator', 'Choose e-Forex Users' (the current step), and 'Preview & Submit'. Below the progress bar, a 'Transaction Users' dialog box is shown. It contains two radio buttons: 'Onboard Existing' (selected) and 'Onboard New'. Below these, there is a section labeled 'Existing Transaction Users List' with a 'Select User' dropdown menu. At the bottom of the dialog are 'BACK' and 'PROCEED' buttons. A note at the very bottom states: 'Note: The User ID and password for this user would be shared on the above mobile number provided by you.' The reference number 'AP90732000755' is visible in the top right corner of the dialog area.

Action4a: On selection of On-board Existing User

- System will display existing transaction user list dropdown
- Load all the list of transaction user mapped to the logged in administrator
- User to choose the transaction user from the dropdown
- On selection of transaction user, system to load and display the existing transaction user details

Figure 3.10: yono Product Subscription – Choose eForex User (Onboard existing user)

Welcome AdminDA - Admin
Corporate Name: PLCCORPD
Last login: 09/06/2020 14:24:12 IST

Corporate Details Choose Administrator **Choose eForex Users** Preview & Submit

Home Corporate INB Cash Management Trade Finance **Forex** SCF

Transaction Users

☒ Onboard Existing ☐ Onboard New

Existing Transaction Users List* AuthDBB

Transactions Users	
Name	AuthDBB
Mobile Number	1234567890
PAN	CFIPM7800K
Employee Number	123456789
Email ID	test@gmail.com
Address1	Mumbai
City	Mumbai
State	Maharashtra
PIN code	400706
Country	India
LINK to Administrator	AdminDB

BACK PROCEED

Action4b: On selection of On-board New User

- System will display e-Forex user details fields for the user to input
- Link to Administrator field to display admin created in current journey as e-Forex Admin
- On proceed, system will proceed to next page

Figure 3.11: yono Product Subscription – Choose eForex User (Onboard new user)

Welcome AdminDA - Admin
Corporate Name: PLCORPD
Last login: 09/06/2020 14:24:12 IST

Home Corporate INB Cash Management Trade Finance **Forex** SCP

Corporate Details Choose Administrator Choose e-Forex Users Preview & Submit

Transaction Users

☐ Onboard Existing ☒ Onboard New

Name* Test-auth

Employee Number* 8789787897987987

PAN* ALMPD3540M

Mobile Number* 91 1234567899

Re-Enter Mobile Number* 91 1234567899

Email ID* hjghads@kij.com

Address1* jhjk

Address2 jkhkjkh

City* kjhjkjh

State * Maharashtra

Country * India

PIN code* 190890

LINK to Administrator * AdminDB

BACK PROCEED

Note: The User ID and password for this user would be shared on the above mobile number provided by you.

Action5: Preview & SUBMIT

On Preview and SUBMIT Page, system will display

- Preview of the form
- Confirm and Back button
- Display Terms & Conditions Checkbox

Figure 3.12: yono Product Subscription - Preview

Welcome AdminDA - Admin
Corporate Name: PLCDRFD
Last login: 08/04/2020 12:02:08 IST

Corporate Details Choose Administrator Choose e-Forex Users Preview & Submit

Preview

Product already subscribed	CINB
Product subscribed to	e-Forex
e-Forex Branch Code	NASIK TREASURY-00437

Corporate Details

Name of Organisation	YONO Business Public Co
PAN	AAACS8577K
Account Number	0000030002039205
Address	ADDRESS1 ADDRESS3 Akola
Mobile Number	8879593359
Email ID	test85001816367@gmail.com
e-Forex Branch Code	NASIK TREASURY-00437

Administrator Details

Administrator

Employee Number	123456789
Name	AdminDB
PAN	FFBPS1893L
Mobile Number	1234567890
Email ID	test@gmail.com
Address1	Mumbai
Address2	Mumbai
City	Mumbai
State	Maharashtra
Country	India
PIN code	400706

e-Forex Users Details

User

Employee Number	123456789
Name	AuthDBB
PAN	CFIPM7800K
Mobile Number	1234567890
Email ID	test@gmail.com
Address1	Mumbai
Address2	Mumbai
City	Mumbai
State	Maharashtra
Country	India
PIN code	400706

☒ I agree to the [Terms and Conditions](#)

[BACK](#) [CONFIRM](#)

Action6: The user to clicks on Confirm button

- a) System will submit the request
- b) Generate Reference number for the request
- c) Display following options for the user to download the omnibus document
 - Email Omnibus document to (Field to enter email id along with Send Button)
 - Download Omnibus document (PDF icon)
 - Print Omnibus document (Print icon)

Figure 3.13: yono Product Subscription - SUBMIT

