## Criteria For Trade Conformation Call

- The trade confirmation call will be done to clients who are doing trade through dealers.
- If client is doing trade through <u>Beyond mobile App</u>, Diet or web browser, will not receive any trade confirmation call.
- Franchisee Client, if trade value in Cash Segment is above 50K and in FO above 2Lac, will receive trade confirmation call.

# Options to Accept or Reject Trade

- There are three ways by which clients can Accept or Reject the Trade.
- It is Mandatory for Clients to respond trade confirmation by choosing any one option.

#### Options:

- 1. Auto generated call
- 2. Link on SMS
- 3. Link on Mail

## Trade confirmation call

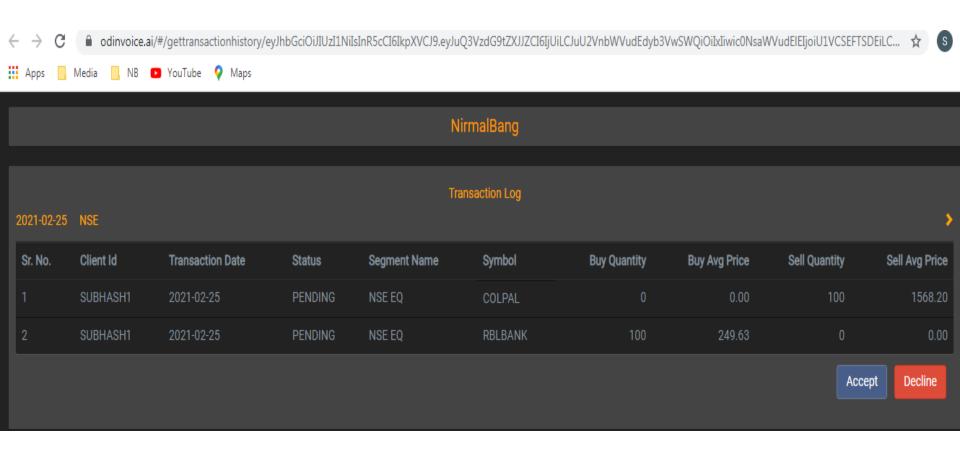
- 1. Auto Call : Client will receive an Auto generated call start at 6.00 PM to Accept or Reject the Trade on same day.
- 2. If Client has not responded the call , they will receive a SMS and mail on their <u>registered mobile number and Email ID</u> with a link in message content.
- 3. Client can click on the link , a web page will open which will show the trade details and a tab to Accept or Reject the trade.
- 4. Link will be active for a week.

#### SMS and mail message content as below

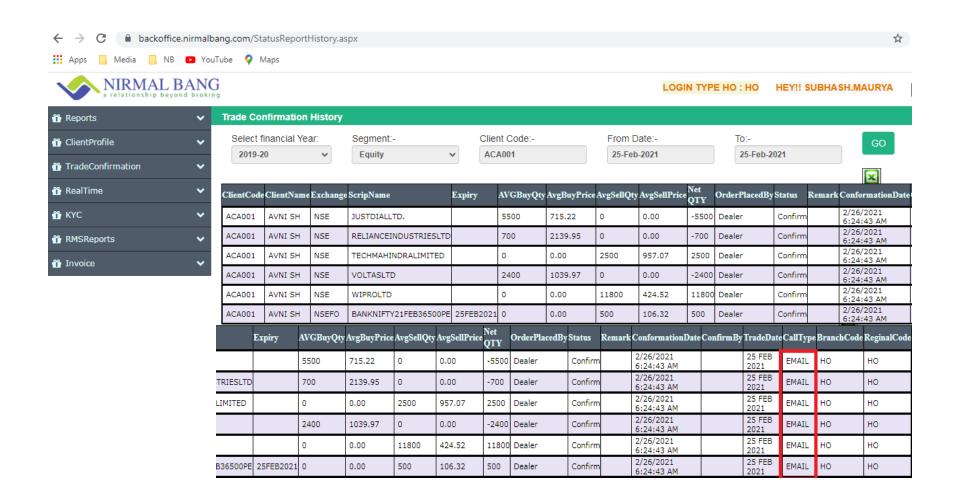
 Dear Client, You missed our Trade Confirmation call. To confirm the trade, call on 02262624339 from your registered mobile no. or click on <a href="https://tinyurl.com/y4j54gso">https://tinyurl.com/y4j54gso</a> or do it through registered Email id-Nirmal Bang.

#### Trade details in browser

• After Click on link: Web page open.

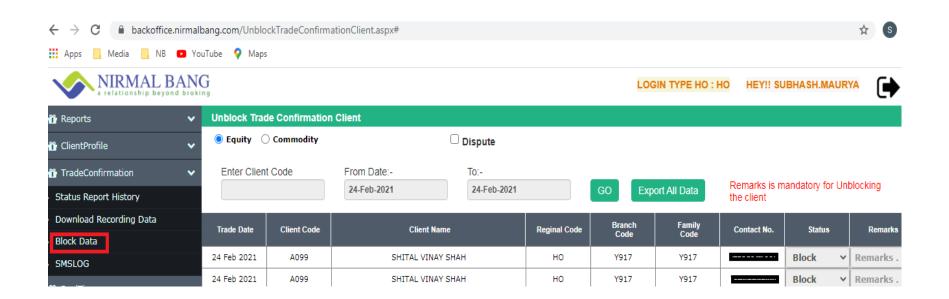


### Back office View after Confirmation



# Backoffice View Confirmation Pending Clients

https://backoffice.nirmalbang.com



# Flow For Trade confirmation

- 1. For Example Trade done on : 23/02/2021
- 2. For equity & Currency : Client will receive call on 23/02/2021 starts at 6 PM.
- 3. For Commodity: Client will receive call next day morning 9 am.
- 4. Next day on 24/02/2021 till 12pm we will collect the response received from Client .
- 5. After 12 PM, file will be uploaded in back office with Clients response either through Email / SMS or by Auto generated call.
- 6. After 1.30pm pending data will be visible in back office in Trade confirmation tab.

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# Trade confirmation on Back office

- 1. Franchisee can ask client to accept the trade through link sent on Email and SMS.
- 2. Branches can take manual confirmation from client and mark unblock in backoffice or ask client to accept the trade through link sent on Email and SMS.
- 3. Again at 5pm on 24/02/2021 we will upload the file, for those Clients who have accepted the trade late.
- 4. On 25/02/2021 pending clients will not be allowed to take any new position in market.