### Changes in Client Master Information using TradeWeb (Client Back Office)

We have added facility to edit some critical client master information using client's back office (TradeWeb) like Email, Mobile Number, and Annual Income details. Process of the same is as below:-

- Follow link:- <u>https://backoffice.progressiveshares.com/TradeWeb/login.aspx</u>
- Input User id (Client Code)
- Input Password
- Click on Login

172.22.10.12/Tradeweb/login.as; × +	0 - 0	
→ C ▲ Not secure   172.22.10.12/Tradewe	* 🤨	
	Progressive Share Brokers Pvt. Ltd. TRADEWEB	
	User ID	
	- Chent Code	
	+) ·····	
	Registered Mobile (88XXXXXX63) Get Password Login	
	Released Date : 25/06/2021 12:05 PM Developed By TradePlus Technologies LLP	

- > Check Your Details as Registered with us:
  - On the landing page, below the registration details there is option to specify that there are changes to details currently on master record.
- Click on Change (if any Modification)

#### Client Details as Registered with us:

Progressive Share Brokers Pvt. Lt. ×							0	-	٥	×
$\leftrightarrow$ $\rightarrow$ <b>C</b> A Not secure   172.	22.10.12/Tradeweb/Master	Pages/Home.a	aspx				0-7	Q	☆ (	P :
TRADEWEB	≡ Progressive Share	Brokers Pvt	. Ltd.			Last Login On	1 02/07/2021 @14:1	0 From 1	2.168.16	8,110
🖨 Home						5				
Confirmation	Ledger Details		Your Details	as Registered with us:						
🖹 Bill	Exchange	Debit	Credit	Balance	Name :	VASHDIDA KENESH SHARK				
		2022			Address :	KARANAXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX				
Ledger	NSE	0.00	0.00	0.00Cr		RECEDENCE MARKED AND A CONTRACT AND				
						XXXX XXXX				
➡ Transaction	Total :	0.00	0.00	0.00Cr		NUMBA1 4199937				
					Email :	hassecand_obsticCD@west56costk.com				
Holding					Telephone :	S88N02420K83 9300220402R43				
					PAN No. :	E009956420C				
					Status :	Active				
• C-II-tI					Bank Name :	EANK OF BARCIDA				
Collateral					Bank A/c Number :	123600.00003327				
A Profit/Loss					MICR/IFSC:	400939991/ BRRCOMMARKS				
					DP ID :	12088860				
Digital Document					Demat Arc Number .	12/888/98/8652/882653				
					There are some changes	to this data.				
I Agreement	1									
Margin ShortFall										
🔟 Capital GainLoss 🛛 🔇										

- > For Changes select option: against each Category of information
  - Mobile : / Email : / Gross Annual Income (Send OTP for verification)
- > Click Continue.

172.22.10.12/Tradeweb/Tplus/Cha	+			• - 0	
→ C A Not secure   17	72.22.10.12/Tradeweb/Tplus/ChangeDetail.a	spx		Q 🛧 🔮	
TRADEWEB	$\equiv$ Progressive Share Brokers Pvt.	≡ Progressive Share Brokers Pvt. Ltd.			
🕈 Home				Last Login On 02/07/2021 @14:10 From 192.168.168	
Confirmation		Details /	As Per Record	Select	
🖹 Bill		Mobile :	<b>XXXXXXX</b> 397	<ul> <li>○ No Change Required</li> <li>● Send OTP for verification</li> </ul>	
🔊 Ledger		Email :	xxxxxxxxxx @gmail.com	<ul> <li>No Change Required</li> <li>Send OTP for verification</li> </ul>	
➡ Transaction		Gross Annual Income :	Btw Rs. 1 to Rs. 5 Lacs	<ul> <li>No Change Required</li> <li>Send OTP for verification</li> </ul>	
Outstanding		Cancel		Continue	
Collateral				•	
ර Profit/Loss					
Digital Document					
Agreement					
B Margin ShortFall					
Jul Capital GainLoss					

- > OTP will be sent to existing registered mobile.
- Update OTP and select .Continue

172.22.10.12/Tradeweb/Tplus/C	Ch: X +	-	o	×
← → C ▲ Not secure	a   172.22.10.12/Tradeweb/Tplus/ChangeDetail.aspx	Q 🕁	P	:
TRADEWEB	≡Progressive Share Brokers Pvt. Ltd.			í
A Home	Last Login On 62/07/2021 @	14:10 From 19	2.168.168.110	
Confirmation	Info! OTP sent to Mobile	×		
🖻 Bill	OTP Received by SMS for change request -			
┛ Ledger				
	Continue			
I Holding	•			
Outstanding				
🗩 Collateral				
c) Profit/Loss				
Digital Document				
🕮 Agreement				
Margin ShortFall				
Luu Capital GainLoss <				
😁 Family	Copyright © 2021 Tradeplus Technologies LLP. All rights reserved.			

- > Update New information for each item of modification and click . Send OTP.
- OTP will be sent on new mobile if mobile number is being modified else on existing registered mobile number.
   Cross Annuel Prest Required as below desument (any and financial prest)
- > Gross Annual Proof Required as below document (any one financial proof.)
- Copy of Latest 6 months bank account statement.
- > Net worth Certificate issued by a Chartered Accountant
- Copy of Latest Form 16 in case of salary income
- Copy of Latest salary slip (2Months)
- ➢ Copy of Latest ITR.
- Latest Balance Sheet for (Non-Individual)
- Click .Continue

172.22.10.12/Tradeweb/Tplus/C	h 🗙		o – Ø
→ C ▲ Not secure	172.22.10.12/Tradeweb/Tplus/ChangeDetail.aspx		\$ (
TRADEWEB	≡ Progressive Share Brokers Pvt. Ltd.		Last Login On 02/07/2021 @10-49 From 192.168.1
Home	-		
Confirmation			
Bill		New details	
Ledger	Mobile :	99999999999999999999999999999999999999	> Client can define relationship /
Fransaction		Owner: Self 🗸	ownership of mobile or email id as
lolding	Email :	xyz@gmail.com	snown the image.
Outstanding		Owner : Self 🗸	
Collateral			Upload Income Proof (Not above 500kb)
Profit/Loss	Gross Annual Income :	Gross Annual Income : Btw Rs. 5 to Rs. 10 Lacs 🗸	Choose File No file chosen
Digital Document		As on Date : 31st March 2021 V	For Trading in Derivative Segment Gross Income Document is Mandatory (Supported types : JPEG/PNG/PDF/TIF/BMP)
Agreement			
Margin ShortFall	Cancel		Continue
Capital GainLoss <			

### > Your Changes Request has been Registered Ref no.67

. 172.22.10.12/Tradeweb/Tplus/Ch	× 🧟 SMS Reports	×   +	• - • ×
$\leftrightarrow$ $\rightarrow$ X A Not secure	172.22.10.12/Tradeweb/Tplus/Changel	Jetail.aspx	☆ 🕑 🗄
TRADEWEB	≡ Progressive Share Brokers Pvt.	172.22.10.12 says	l act Looin On 02/07/2021 612:25 From 102 188 188 38
A Home		Vour Change Request has been Registered. Ref No : 67	
Confirmation			
🖹 Bill		New details	
Ledger	Mobile :	XXXX XXXX <sup>289</sup> Send OT	P Enter OTP : 0261
≓ Transaction		Owner : Self 🗸	
Holding	Enville	XXXX XXXX @gmail.con	
亘 Outstanding	Eman .	Owner: Self 🗸	
🗩 Collateral			Upload Income Proof (Not above 500kb)
🖒 Profit/Loss	Gross Annua	Gross Annual Income : Btw Rs. 1 to Rs. 5 Lacs	Choose File No file chosen
🕒 Digital Document		As on Date : 31st March 2021 V	For Trading in Derivative Segment Gross Income Document is Mandatory (Supported types : JPEG/PNG/PDF/TIF/BMP)
I Agreement	· · · · · · · · · · · · · · · · · · ·		
Margin ShortFall	Cancel		Continue
Lini Capital GainLoss <	Copyright © 2021 Tradeplus Tech	nologies LLP. All rights reserved.	