

**NEW BOB WORLD INTERNET  
SERVICES**

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## 9 Services: All the menus and sub-menus is displayed here below:

The screenshot displays a hierarchical menu structure for 'Services'. The main menu includes 'Service Requests', 'General Services', and 'Government and Tax Payments'. 'Service Requests' is expanded to show sub-menus: 'New Requests', 'My Requests', 'Recall Requests', 'My Approvals', 'Interest Certificate', 'Link Aadhaar', and 'Check Aadhaar Status'. 'General Services' is expanded to show: 'Modelling', 'Reports', 'Detailed Activity Inquiry', 'Transaction Limit Inquiry', 'Special Offers', and 'Application Status Inquiry'. 'Government and Tax Payments' is expanded to show: 'Login to E-Filing', 'Tax Credit (View Form 26AS)', 'View/Print CBEC Challan', 'View/Print CBDT Challan', 'View/Print State Commercial Taxes Payments Challan', and 'View/Print Custom Challan'.

### 9.1 Service Requests

9.1.1 **New Requests:** Various new request will be initiated from this menu. Details are mentioned below:

The screenshot shows the 'New Requests' web interface. At the top, there are navigation tabs for 'Services', 'Service Requests', and 'New Requests'. Below the tabs, the title 'New Requests' is displayed, followed by a note: 'Note:-Please enter at least three characters for se'. A search bar with the placeholder 'Request' and a 'SEARCH' button is present. The main content area is divided into several sections:

- Request Categories:** A search bar and a 'SEARCH' button.
- Request Type:** A dropdown menu.
- Accounts:** A section with a right-pointing arrow.
- Deposit Accounts:** A section with a right-pointing arrow, containing links for:
  - All Accounts - Update Nominee Details
  - Deposit Accounts - Open a Recurring Deposit Account
  - Deposit Accounts - Open Term Deposit Account
  - Form 15G/H
  - Apply for Loan against Deposit
  - Apply for Overdraft against Deposit
  - Premature Closure of Deposit Accounts
- Operative Accounts:** A section with a right-pointing arrow, containing links for:
  - Operative Accounts - Apply for a Debit Card
  - Operative Accounts - Block Debit Card
  - Operative Accounts - Gift Card Issuance
  - Operative Accounts - Request New Cheque Book
  - Operative Accounts - Stop Cheque
  - Operative Accounts- Debit Card Limit Change
- Other Services:** A section with a down-pointing arrow, containing links for:
  - View and Update Consumer Contact Details
  - Sukanya Samridhi Yojana- De-registration
  - Sukanya Samridhi Yojana
  - Pradhan Mantri Bima Yojna
  - Atal Pension Yojana- Registration
  - Mobile Banking Registration
  - MP Fee Collection
  - Account Transfer
  - Set Debit Card ATM/POS Limits
  - Open SSA Account
  - Open PPF Account

A 'BACK' button is located at the bottom right corner of the page.

### 9.1.1.1 Accounts

**9.1.1.1.1 All Accounts Update Nominee Details:** User can update the nominee in the savings and deposit accounts which have self mode of operation. Select the account Type and Account number, clicks on CONTINUE button.

Services > Service Requests > New Requests

Update Nominee Details

1 New Request Details 2 Preview and Confirm 3 Summary

\* Indicates Mandatory Fields

Update Nominee Details

Account Type\* Savings Account

Account Number\*

CONTINUE BACK

In the next screen, user has to enter all the required details in the respective fields for nominee updation. User has to click on click on add to list. In the next screen it will display the entered details where user has to enter their transaction password and click on SUBMIT button.

After successful validation of the transaction password, the nominee will be updated in that account.

Nominee updation request is limited to two per year through net banking. Only single nomination will be allowed through net banking.

Services > Service Requests > New Requests

New Request

1 New Request Details 2 Preview and Confirm 3 Summary

\* Indicates Mandatory Fields

Update Nominee Details

Account Type\* Savings Account

Account Number\*

Nominee Name\*

Relationship\* Select

Date Of Birth (ddMM/yyyy)\*

Nomination Percentage(%) 100.0

Address Line 1\*

Address Line 2\*

City\* Select

State\* Select

Country\* Select

Zip Code\*

Is Nominee Minor\*  Yes  No

BACK ADD TO LIST

Date Of Birth (ddMM/yyyy)\*

Nomination Percentage(%) 100.0

Address Line 1\*

Address Line 2

City\*

State\*

Country\*

Zip Code\*

Is Nominee Minor\*  Yes  No

Additional Details in case nominee is a minor :

Guardian Name(if nominee is minor) \*

Guardian Address 1(if nominee is minor) \*

Guardian Address 2(if nominee is minor) \*

Guardian Relation(if nominee is minor) \*

Guardian City\*

State\*

Guardian Country\*

Zip Code\*

9.1.1.2 **Deposit Accounts:** User can open the FD/RD online by using this option.

9.1.1.2.1 **Open Recurring Deposit Account:** RD will be opened by using this option.

New Request

1 New Request Details 2 Preview and Confirm 3 Summary

Open Recurring Deposit Account \* Indicates Mandatory Fields

Account Preferences

The currency of the debit account will be taken as the currency of the new deposit account. Opening of a term deposit is subject to the availability of funds in your account as well as the rules and regulations of the bank and Central Bank.

Debit Account\*

Available Balance

Select Scheme\*

Prevailing Interest Rates on deposits

Deposit Amount\*

Deposit Duration\*  (Years)  
 (Months)

Recurring Deposit Branch

Nomination Required\*  Yes  No

Remarks

Transaction Remarks

9.1.1.2.2 **Open Term Deposit Account:** FD will be opened by using this option.

New Request

1 New Request Details 2 Preview and Confirm 3 Summary

Open Term Deposit Account \* Indicates Mandatory Fields

Account Preferences

The currency of the debit account will be taken as the currency of the new deposit account. Opening of a term deposit is subject to the availability of funds in your account as well as the rules and regulations of the bank and Central Bank.

Debit Account\*

Available Balance INR

Select Scheme\*

Prevailing Interest Rates on deposits [Click Here](#)

Deposit Amount\*   
Min. amount INR 1000.00  
in multiples of INR 100.00

Deposit Duration\*  (Years)  
 (Months)  
 (Days)  
Min. 12month(s) 0day(s) to 120month(s) 0day(s)

Fixed Deposit Branch

Nominee Details Required\*  Yes  No

Auto Renewal\*  Yes  No

9.1.1.2.3 **Form 15G/H:** User can submit the form 15G/H by using this option.

**9.1.1.2.4 Apply for Loan against Deposit:** User can open the LABOD online by using this option against the FDs opened online only.

The screenshot shows the 'New Request' form for 'Loan Against FD/RD'. The form is divided into three steps: 1. New Request Details, 2. Preview and Confirm, and 3. Summary. Under 'Basic Loan Details', there is a dropdown menu for 'Account Number' with a list of options including '(INR) -'. There are 'BACK' and 'CONTINUE' buttons at the bottom right.

**9.1.1.2.5 Apply for Overdraft against Deposit:** User can open the ODBOD online by using this option against the FDs opened online only.

The screenshot shows the 'New Request' form for 'Apply for Overdraft against Deposit'. The form has a dropdown menu for 'Account Number\*' with a list of options including '(INR) -'. There are 'CONTINUE' and 'BACK' buttons at the bottom right.

**9.1.1.2.6 Premature Closure of Deposit Accounts:** User can do pre-mature closure of the FD/RD which are opened through online channel.

The screenshot shows the 'Premature Closure of TD Accounts' form. It has three steps: 1. New Request Details, 2. Preview and Confirm, and 3. Summary. Under 'Basic Account Details', there are two dropdown menus: 'Select Deposit Account\*' and 'Select Credit Account\*'. A red asterisk indicates mandatory fields. There are 'BACK' and 'CONTINUE' buttons at the bottom right.

### 9.1.1.3 Operative Accounts

**9.1.1.3.1 Apply for a Debit Card:** User can apply for a new Debit card by using this option.

The screenshot shows the 'New Request' form for 'Apply for Debit Card'. It has three steps: 1. New Request Details, 2. Preview and Confirm, and 3. Summary. Under 'Apply for Debit Card', there is a dropdown menu for 'Account\*'. A red asterisk indicates a mandatory field. There are 'BACK' and 'CONTINUE' buttons at the bottom right.

**9.1.1.3.2 Block Debit Card:** User block/hotlist their Debit Card by using this option.

### 9.1.1.3.3 Gift Card Issuance: User can apply for issuance of Gift card by using this option.

Gift Card Issuance

Account and Amount Details

Account to be Debited\* **Select**

Available Balance:

Gift Amount\*

(Between Rupees 500 to 50,000)

Card Issuance Fee:  [Fee Structure](#)

Courier Charges:

Beneficiary Details

Dispatch Now  Schedule Delivery

Shipping Address

Ship to Current Address  Ship to New Address

Address 1:

Address 2:

City:

Pincode:

State:

Tel/Mobile:

[Charges and Terms & Conditions](#)

### 9.1.1.3.4 Request New Cheque Book: User can submit request for issuance of new cheque book by using this option.

Services > Service Requests > New Requests

New Request

1 New Request Details 2 Preview and Confirm 3 Summary

Request New Cheque Book

For Account Number\* **Select**

Addressee Name\*

Cheque Book will be delivered at Address\* **Select**

Landmark:

Number of Cheque Books\* **Select**

Transaction Remarks:

\* I, hereby confirm that the above mentioned name and communication address is correct.  Yes  No

Services > Service Requests > New Requests

New Request

1  New Request Details 2  Preview and Confirm 3  Summary

Request New Cheque Book

Account:

Addressee Name:

Address: Mailing

INDIA

Number of Cheques: 1

Landmark:

Transaction Remarks:

Remarks:

I agree to all the terms and conditions.

\* Charges will be applicable as per bank rules and the same will be debited separately wherever applicable in the Cheque Book requested account.  
\* Personalised cheque book issued only for identified branches  
\* In case of joint account holder, the cheque book will contain names of all joint account holders as available in the selected account.  
\* Cheque book will be issued against the name available in the selected account.

Enter your credentials to confirm the transaction

Confirmation Details

Transaction Password\*



**9.1.1.3.5 Stop Cheque:** User can stop the cheques which are not yet cleared.

The screenshot shows a 'New Request' form with a three-step progress bar: 1. New Request Details, 2. Preview and Confirm, and 3. Summary. The 'Stop Cheque' section includes an 'Account' dropdown, a 'Stop Cheque' button, a 'Cheque Number\*' field, a 'Stop Multiple Cheques' checkbox, 'Start Cheque Number\*' and 'End Cheque Number\*' fields, and a 'Reason for Stopping\*' dropdown set to 'INSTRUMENT REPORTE'. A red asterisk indicates mandatory fields. 'BACK' and 'CONTINUE' buttons are at the bottom right.

**9.1.1.3.6 Stop Multiple Cheque:** User can stop multiple cheques by using this option.

The screenshot shows a 'New Request' form with a three-step progress bar: 1. New Request Details, 2. Preview and Confirm, and 3. Summary. The 'Stop Multiple Cheques' section includes an 'Account' dropdown, a 'Stop Multiple Cheques' button, a 'Cheque Number\*' field, a 'Stop Multiple Cheques' checkbox, 'Start Cheque Number\*' and 'End Cheque Number\*' fields, and a 'Reason for Stopping\*' dropdown set to 'INSTRUMENT REPORTE'. A red asterisk indicates mandatory fields. 'BACK' and 'CONTINUE' buttons are at the bottom right.

**9.1.1.3.7 Debit Card Limit Change:** User can set/change their limits of Debit card for ATM/POS/ECOM by using this option. User can set only equal/below the available limit of the respective debit card for respective type of transactions.

The screenshot shows a 'New Request' form with a three-step progress bar: 1. New Request Details, 2. Preview and Confirm, and 3. Summary. The 'Debit Card Limit Change' section includes an 'Account' dropdown, a 'Card Number\*' dropdown set to 'Select', and a 'GO' button. A red asterisk indicates mandatory fields. 'BACK' and 'CONTINUE' buttons are at the bottom right.

**9.1.1.4 Other Services**

**9.1.1.4.1 View and update consumer Contact details:** User can update/change their email ID by using this option.

The screenshot shows a 'New Request' form with a three-step progress bar: 1. New Request Details, 2. Preview and Confirm, and 3. Summary. The 'View and Update Customer Contact Details' section includes a 'Customer ID' dropdown. 'BACK' and 'CONTINUE' buttons are at the bottom right.

Services > Service Requests > New Requests

### My Contact Details

1 Update Contact Details      2 Preview and Confirm      3 Summary

Email (Communication)

Old Email ID: [REDACTED]

New EmailID: \_\_\_\_\_

BACK CONTINUE

Services > Service Requests > New Requests

### My Contact Details

1 Update Contact Details      2 Preview and Confirm      3 Summary

Email ID Update Details

Old Email ID: [REDACTED]      New EmailID: [REDACTED]

Remarks: \_\_\_\_\_

Enter your credentials to confirm the transaction

Confirmation Details

Transaction Password\* \_\_\_\_\_

One Time Password\* \_\_\_\_\_

REGENERATE OTP

Click Re-Generate OTP to receive OTP on registered Mobile No and Email Id

BACK SUBMIT

**9.1.1.4.2 SSY De-registration:** User can register their SSY account by using this option.

Services > Service Requests > New Requests

### De-Link Sukanya Samridhhi Account

1 New Request Details      2 Preview and Confirm      3 Summary

\* Indicates Mandatory Fields

De-Registration of Sukanya Samridhhi Account

Select Details

Select Sukanya Samridhhi Account Number\* \_\_\_\_\_

CONTINUE

**9.1.1.4.3 SSY Registration:** User can De-register their SSY account by using this option.

Services > Service Requests > New Requests

### New Request

1 New Request Details      2 Preview and Confirm      3 Summary

\* Indicates Mandatory Fields

Registration of Sukanya Samridhhi Account

Basic Account Details

Enter Account Number\* \_\_\_\_\_

CONTINUE

**9.1.1.4.4 Pradhan Mantri Bima Yojana:** User can register for PMJJBY and PMSBY by using this option. Select the PMJJBY or PMSBY and fill the other required details on the screen and clicks on SUBMIT button. On the next screen it will display the details, where user has enter the transaction password and click on submit button. After successful validation of the transaction password, the request will be processed successfully.

**9.1.1.4.4.1 PMJJBY:**

**9.1.1.4.4.2 PMSBY**

**9.1.1.4.5 Atal Pension Yojana Registration:** User can register for APY by using this option. Fill the other required details on the screen and clicks on SUBMIT button. On the next screen it will display the details, where user has enter the transaction password and click on submit button. After successful validation of the transaction password, the request will be processed successfully.

**9.1.1.4.6 Mobile Banking Registration:** User can Register/De-register/Reset MPIN of the Mobile banking application i.e. M Connect Plus by using this option.

9.1.1.4.6.1 **Registration:** Select the customer ID, click on CONTINUE button, enter the transaction password in the next screen and click the SUBMIT button. After successful validation, the user will get registered for M Connect Plus application and the MPIN will be sent on his registered mobile number.

The screenshot shows the 'M-Connect(Plus) Registration' interface. At the top, there are navigation tabs for 'Services', 'Service Requests', and 'New Requests'. Below this, there are three buttons: 'REGISTRATION', 'DE-REGISTRATION', and 'RESET MPIN'. A progress bar at the top indicates three steps: 1. New Request Details (active), 2. Preview and Confirm, and 3. Summary. The main content area includes a 'Select Customer Id' dropdown menu with the text 'Select Customer ID? Select'. Below this, 'Customer Details' are displayed with redacted fields for Name and Mobile. A note states: '1. All accounts linked to the selected customer ID will be registered for Mobile Banking.' A 'CONTINUE' button is located at the bottom right.

The screenshot shows the 'M-Connect(Plus) Registration' interface at the 'Preview and Confirm' step. The progress bar now highlights step 2. The 'Customer Details' section shows 'Customer ID', 'Customer Name', and 'Mobile' (with 'Request Date: 23/06/2020' next to it). A note is present: '1. All accounts linked to the selected customer ID will be registered for Mobile Banking.' Below this, there is a 'Remarks' field and a prompt: 'Enter your credentials to confirm the transaction'. The 'Confirmation Details' section contains a 'Transaction Password' field. 'BACK' and 'SUBMIT' buttons are at the bottom right.

9.1.1.4.6.2 **De-registration:** Select the customer ID, click on CONTINUE button, enter the transaction password in the next screen and click the SUBMIT button. After successful validation, the user will get de-registered for M Connect Plus application.

The screenshot shows the 'M-Connect(Plus) De-Registration' interface. At the top, there are navigation tabs for 'Services', 'Service Requests', and 'New Requests'. Below this, there are three buttons: 'REGISTRATION', 'DE-REGISTRATION', and 'RESET MPIN'. A progress bar at the top indicates three steps: 1. New Request Details (active), 2. Preview and Confirm, and 3. Summary. The main content area includes a 'Select Customer Id' dropdown menu with the text 'Select Customer ID?'. Below this, 'Customer Details' are displayed with redacted fields for Name and Mobile. A note states: '1. All accounts linked to the selected customer ID will be De-Registered for Mobile Banking.' A 'CONTINUE' button is located at the bottom right.

9.1.1.4.6.3 **Reset MPIN:** Select the customer ID, click on CONTINUE button, enter the transaction password in the next screen and click the SUBMIT button. After successful validation, the user will receive the new MPIN on his registered mobile number.

9.1.1.4.7 **MP Fee Collection:** User should use this option for MP fee payment.

9.1.1.4.8 **Account Transfer:** User can transfer his Saving Account from one Branch to Other Branch online through Internet Banking.

Select Account number, Select the Branch, Enter the reason for account transfer and click on CONTINUE button. User also change their communication or permanent address by selecting the respective checkbox.

On the next screen enter the transaction password and click on SUBMIT button.

Post validation request will be submitted to CBS. "Request generated successfully" screen will be displayed to the user with the message "Your reference is xxxxxxxxxxxxxx. Please contact the new branch with this reference number and KYC documents along with the address proof within 1 month of lodging this request else it will be discarded". An sms for the same will also be sent to the user's registered mobile number.

Services > Service Requests > New Requests

### Account Transfer

1 New Request Details      2 File Details      3 Summary

Account Details  
Account Number \*

New Branch Details  
Branch \*

Reason For Transfer :

Communication Address Details  
 I want to change my communication address.

Permanent Address Details  
 I want to change my permanent address.

#### 9.1.1.4.8.1 Branch Details

### Branch Details

Branch Code	Description	City	
1022	GULABPURA , DISTT BHILWARA	ARADE	<input type="button" value="Select"/>
2579	SSI BHILWARA, BHILWARA	BEAWA	<input type="button" value="Select"/>
2184	CHAKRA BERIA BR., KOLKATA	BHILW	<input type="button" value="Select"/>
		KOLKA	<input type="button" value="Select"/>

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New Branch Details

Branch \*

Reason For Transfer :

Communication Address Details  
 I want to change my communication address.

Address 1 \*

Address 2 :

Address 3 :

City \*

State \*

Pin Code \*

Permanent Address Details  
 I want to change my permanent address.

Address 1 \*

Address 2 :

Address 3 :

City \*

State \*

Pin Code \*

**9.1.1.4.9 Set Debit Card ATM/POS Limits:** User can set/change their limits of Debit card for ATM/POS/ECOM by using this option. User can set only equal/below the available limit of the respective debit card for respective type of transactions.

Services > Service Requests > New Requests

### Set Debit Card ATM/POS Limits

1 New Request Details      2 Preview and Confirm      3 Summary

\* Indicates Mandatory Fields

Basic Account Details  
Select Customer ID\*

Services > Service Requests > New Requests

### Set Debit Card ATM/POS Limits

1 New Request Details      2 Preview and Confirm      3 Summary

Basic Account Details

Card Number\*

Card Expiry Month\*

Card Expiry Year\*

\* Indicates Mandatory Fields

BACK CONTINUE

**9.1.1.4.10 Open SSA Account:** User can open new SSY account for their girl child by using this option.

Services > Service Requests > New Requests

### New Request

1 New Request Details      2 Preview and Confirm      3 Summary

Open Sukanya Samridhi Account

Girl Child Customer ID  YES  NO

Account Number\*

INR 2,013.35

BACK CONTINUE

Services > Service Requests > New Requests

### New Request

1 New Request Details      2 Preview and Confirm      3 Summary

Open Sukanya Samridhi Account

Girl Child Customer ID  YES  NO

Girl Child Customer Id\*

Account Number\*

INR 2,013.35

BACK CONTINUE

**9.1.1.4.11 Open PPF Account:** User can open new PPF account for them by using this option.

**9.2 My Requests:** All the submitted requests will be displayed to the user here by clicking this menu.

Services > Service Requests > My Requests

### My Requests

Search

My Request List

Reference ID	Request Date	Entered By
Request Type	Status	
17153	27/08/2020	
Personalize Limits	Closed	

History

**9.2.1 Recall Requests:** User can recall such request by using this option.

**9.2.2 My Approvals:** User can view the records which are pending for approval of the user.

**9.2.3 Interest Certificate:** User can generate and download the Interest certificate by using this option.

Services > Service Requests > Interest Certificate

### Interest Certificate

Balance Certificate  Interest Certificate for Operative/Deposit Account  Interest Certificate for Home/Education Loan

9.2.3.1 **Balance Certificate:** User can generate and download the Balance certificate by using this option.

The screenshot shows the 'Interest Certificate' page with the 'Balance Certificate' option selected. A dropdown menu for 'Account ID' is open, displaying several redacted account numbers. The page includes breadcrumb navigation: Services > Service Requests > Interest Certificate.

9.2.3.2 **Interest Certificate**

9.2.3.2.1 **For Operative/Deposit Account:** User can generate and download the Interest certificate for their operative/deposit accounts by using this option.

The screenshot shows the 'Interest Certificate' page with the 'Interest Certificate for Operative/Deposit Account' option selected. Fields include 'Financial Year' (Current), 'Account Type' (Operative Accounts), and 'Account ID' (redacted). A 'DOWNLOAD CERTIFICATE' button is visible at the bottom right. Breadcrumb navigation: Services > Service Requests > Interest Certificate.

9.2.3.2.2 **For Home/Education Loan:** User can generate and download the Interest certificate for their Home/Education accounts by using this option.

The screenshot shows the 'Interest Certificate' page with the 'Interest Certificate for Home/Education Loan' option selected. It also includes 'Provisional Interest Certificate' and 'Paid Interest Certificate' options. Breadcrumb navigation: Services > Service Requests > Interest Certificate.

9.2.4 **Link Aadhaar:** User can the Aadhaar in the account by using this option.

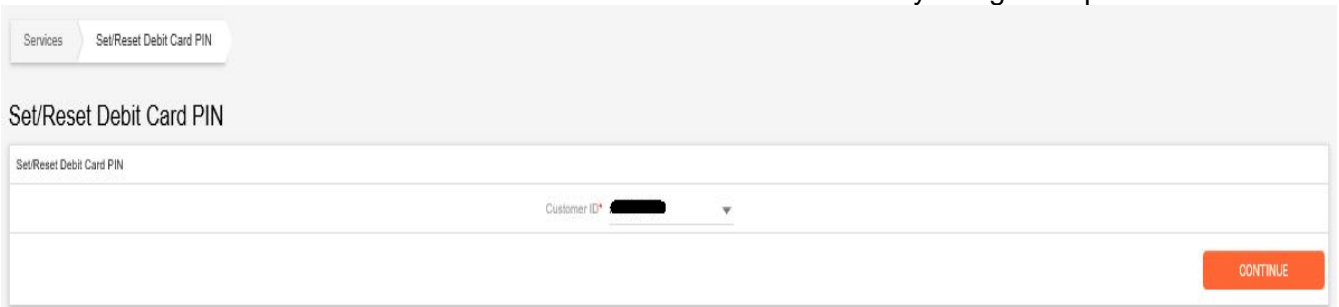
The screenshot shows the 'Aadhaar Seeding' process with three steps: 1. New Request Details, 2. Preview and Confirm, and 3. Summary. The 'Select Details' section includes an 'Account Number' field (redacted) and a 'CONTINUE' button. A note indicates that an asterisk (\*) denotes mandatory fields. Breadcrumb navigation: Services > Service Requests > Link Aadhaar.

9.2.5 **Check Aadhaar Status:** User can view the Aadhar link status by using this option.

The screenshot shows the 'Status Details' page for 'Basic Account Details'. It displays the following information: Customer Name, Account Number, Customer ID, Aadhaar Status (Aadhaar is Linked), Branch Name, Aadhaar Number, and Mobile Number. All fields except Aadhaar Status are redacted. A 'BACK' button is located at the bottom right. Breadcrumb navigation: Services > Service Requests > Link Aadhaar.

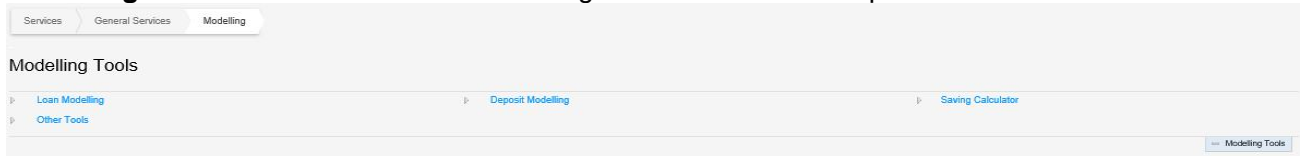


**9.3 Set/Reset Debit Card PIN:** User can set/reset their Debit card PIN by using this option.

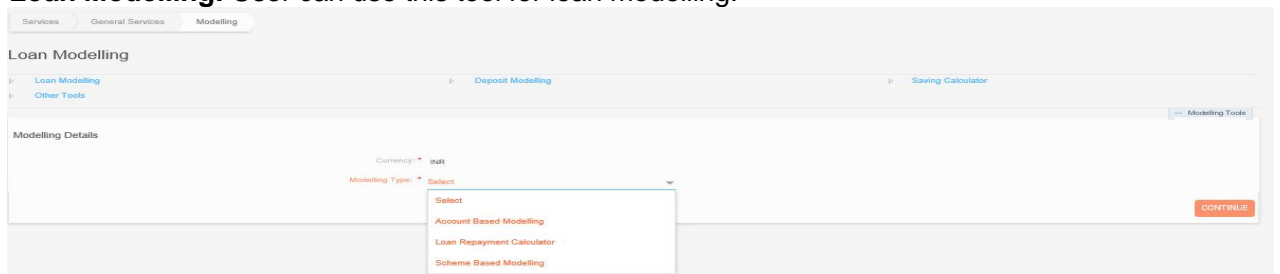


**9.4 General Services**

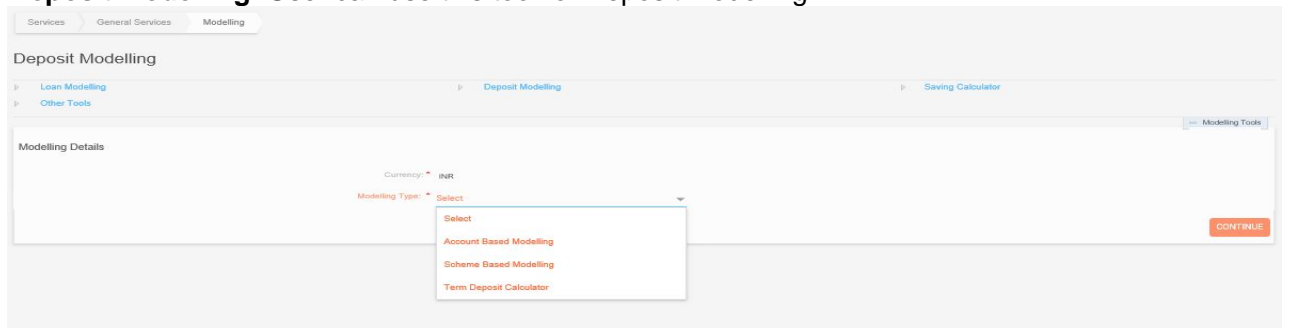
**9.4.1 Modelling:** User can use the various modelling tool available in this option.



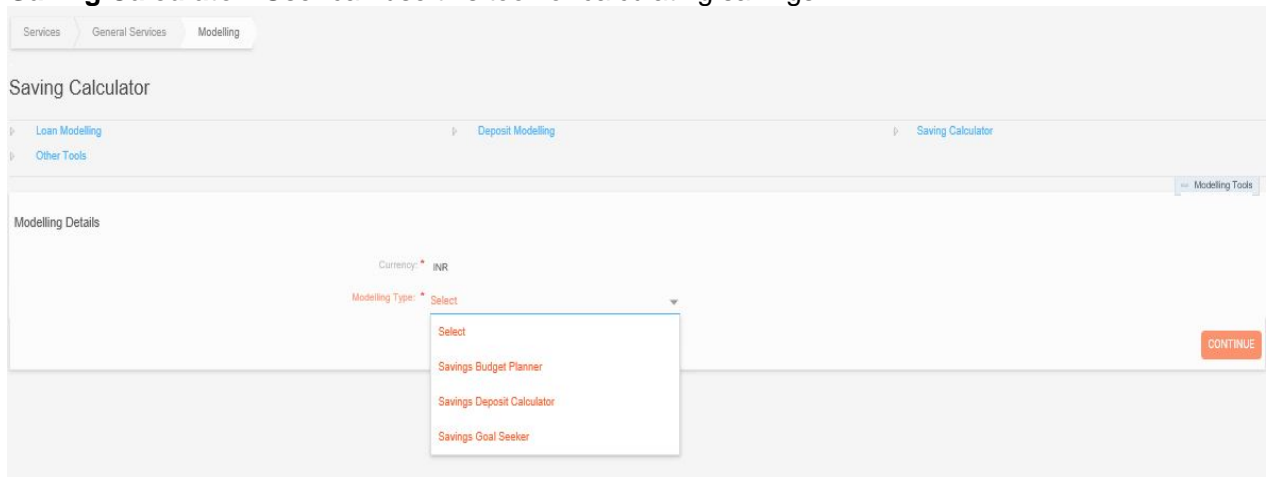
**9.4.1.1 Loan Modelling:** User can use this tool for loan modelling.



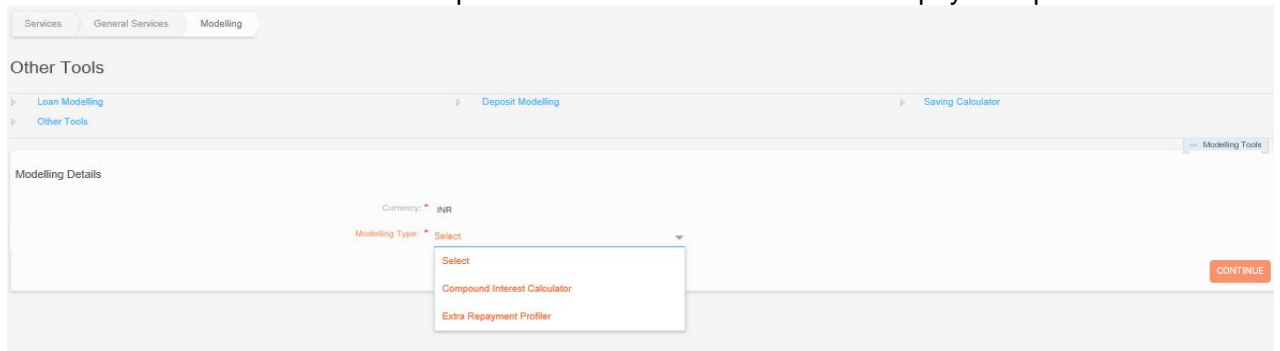
**9.4.1.2 Deposit Modelling:** User can use this tool for Deposit modelling.



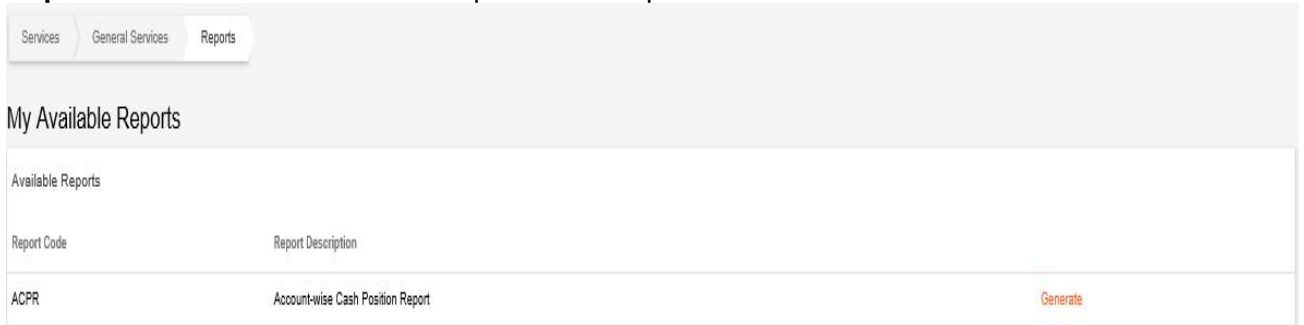
**9.4.1.3 Saving Calculator:** User can use this tool for calculating savings.



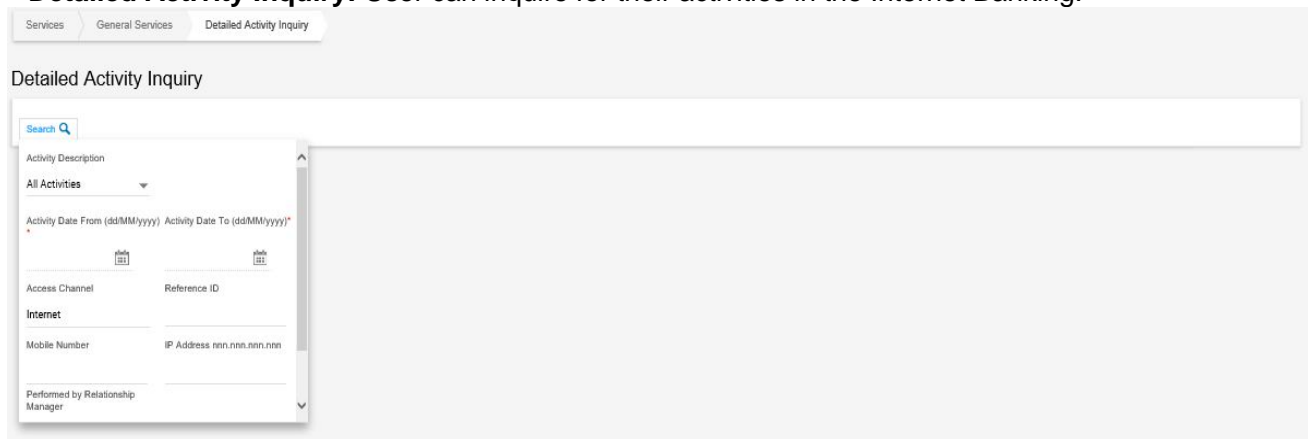
9.4.1.4 **Other Tools:** User can use the compound interest calculator and extra repayment profiler.



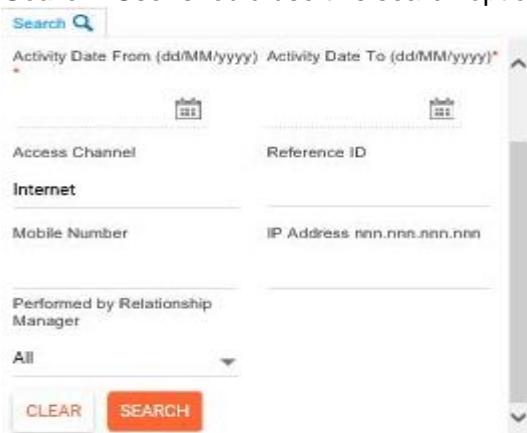
9.4.2 **Reports:** User can use the various reports for their personal and business use.



9.4.3 **Detailed Activity Inquiry:** User can inquire for their activities in the Internet Banking.



9.4.3.1 **Search:** User should use this search option for searching their activities in the Internet Banking.



### 9.4.4 Transaction Limit Inquiry: User can inquire about their various transaction limits by using this option.

Services > General Services > Transaction Limit Inquiry

#### Transaction Limit Inquiry

Search

Transaction Type(s)	Daily Amount Limit	Monthly Amount Limit	Limit Start Date	Limit End Date
Channel Type	Weekly Amount Limit	Yearly Amount Limit	2-Factor Security	Personalized Limit for Hot Transaction
Bharat Bill Payment,Fund Transfer To Own Account,Fund Transfer Within Account,Fund Transfer To OTHER Account,Transaction Upload Type 1 <a href="#">more</a>	1,000.00 / 1,000.00	NA	18/09/2019	31/12/2100
Internet	NA	NA	No	No
Bharat Bill Payment,Fund Transfer To Own Account,Fund Transfer Within Account,Fund Transfer To OTHER Account,Transaction Upload Type 1 <a href="#">more</a>	NA	NA	18/09/2019	31/12/2100
Internet	NA	NA	Yes	No
IMPS using IFSC P2A,IMPS Transfer using MMID,IMPS Transfer using MMID Payee,IMPS Transfer using Aadhaar Payee <a href="#">more</a>	200,000.00 / 200,000.00	NA	18/09/2019	31/12/2100
Internet	NA	NA	No	No
IMPS using IFSC P2A,IMPS Transfer using MMID,IMPS Transfer using MMID Payee,IMPS Transfer using Aadhaar Payee <a href="#">more</a>	NA	NA	18/09/2019	31/12/2100
Internet	NA	NA	Yes	No
Quick Transfer using MMID,Quick Payment Using NEFT,Within Bank Quick Transfer,Quick Transfer using IFSC <a href="#">more</a>	2,500,000.00 / 2,500,000.00	NA	11/06/2020	31/12/2100
Internet	NA	NA	No	No

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#### 9.4.4.1 Search: User should use this search option for searching their various transaction limits by using this option.

Search

Transaction Type:  Channel Type:

Account Nickname:

As on Date (dd/MM/yyyy)\*:

### 9.4.5 Special Offers: Bank's any special offers will be displayed here.

### 9.4.6 Application Status Inquiry: User inquire the status of their application by using this option.

## 9.5 Government and Tax Payments

### 9.5.1 Login to E-Filing: User can logs into the income tax India e-filing website by using this option for e-filing/e-verification of the tax returns.

Services > Government and Tax Payments > Login to E-Filing

#### Login To E-Filing

Select Account Number:

**9.5.2 Tax Credit (View Form 26AS):** User can view/print the form 26AS by using this option.

Services > Government and Tax Payments > Tax Credit (View Form 26AS)

### View Tax Credit(Form 26AS)

Search Criteria

Customer ID

**9.5.3 View/Print CBEC Challan:** User can view/print the CBEC challans by using this option.

Services > Government and Tax Payments > Tax Credit (View Form 26AS)

### View Tax Credit(Form 26AS)

Search Criteria

Customer ID

**9.5.4 View/Print CBDT Challan:** User can view/print the CBDT challans by using this option.

Services > Government and Tax Payments > View/Print CBDT Challan

### Direct Tax Challan Report

Search Criteria

From Date (dd/MM/yyyy)\*

To Date (dd/MM/yyyy)\*

Payment ID:

From Amount:

To Amount:

Challan Number:

**9.5.5 View/Print State Commercial Taxes Payments Challan:** User can view/print the State Commercial Taxes Payments challans by using this option.

Services > Government and Tax Payments > View/Print State Commercial Taxes Payments Challan

### Dealer Reference

Search Criteria

State:

From Date:\*

To Date:\*

**9.5.6 View/Print Custom Challan:** User can view/print the Custom challans by using this option.

Services > Government and Tax Payments > View/Print Custom Challan

### Custom Tax Challan Report

Search Criteria

From Date (dd/MM/yyyy)\*

To Date (dd/MM/yyyy)\*

From Amount:

To Amount:

Payment Id:

**9.6 Personal Financial Management:** User can use this option for their personal financial management.

**9.6.1 Manage Categories:** User can manage the categories and budgets.

Services > Personal Financial Management > Manage Categories

### Manage Category and Budgeting

ADD CATEGORY COPY CATEGORY

Search Criteria

Category Name: All

Category Head: All

Rule Keyword:

SEARCH CLEAR

**9.6.2 View Reports:** User can view the reports.

Services > Personal Financial Management > View Reports

### My Reports

Budget Analysis (Bar Chart) Expense - Income Analysis (Bar Chart) Expense - Income Analysis (Pie Chart)

**9.6.3 Manage Goals:** User can manage the Goals.

Services > Personal Financial Management > Manage Goals

### Manage Goals

Manage Goals is an effective tool for making progress by ensuring that the user is aware of what needs to be done to achieve the goal. You can follow the following steps to manage your goals.

1. Set up Goal
2. Link Account
3. Fund the Goal

Get started now!!!

Define New Goal

Plan for Retirement Buy a Car Buy a Home Add custom goal

**9.6.4 Manage Budgets:** User can manage the budgets.

Services > Personal Financial Management > Manage Budgets

### Manage Budgets

Welcome to Budgets!

Budgeting helps you track your finances.

You don't have any categories created yet. In order to define your first budget, a category needs to be created.

[Add New Category](#)

### 9.6.5 Manage Categories: User can manage the categories.

Services > Personal Financial Management > Manage Categories

## Manage Categories

Default Categories [i](#)  [Go](#)

Category Name	Category Head	Keywords	Actions
ADVANCE TAX	Expense	ADVANCE TAX	<a href="#">Copy To My Categories</a>
APP. MAINT. FEE	Expense	APP. MAINT. FEE	<a href="#">Copy To My Categories</a>
ASSET SALE	Income	ASSET SALE	<a href="#">Copy To My Categories</a>
BANK CHARGES	Expense	BANK CHARGES	<a href="#">Copy To My Categories</a>
BONUS	Income	BONUS	<a href="#">Copy To My Categories</a>

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✖ You can either copy a category from default categories or add a new category.

My Categories [i](#)  [Go](#) [ADD NEW CATEGORY](#)

### 9.6.6 My Finance Overview: User can view the overview of their finances.

Services > Personal Financial Management > My Finance Overview

## My Finance - Overview

Welcome to My Finance - Overview!

Create a new category.

Categories help you to categorize the transactions and track your finances by associating a budget to it.

[Add New Category](#)

### 9.6.7 Manage Cash Transactions: User can manage their cash transactions.

Services > Personal Financial Management > Manage Cash Transactions

## Cash Transactions

Welcome to Manage Cash Transactions!

This functionality helps user to add cash transaction.

Cash transactions are any type of financial transactions where cash is used to settle a transaction.

[Add Cash Transaction](#)

**9.7 Enable/Disable Transaction Access:** User can change their right by using this option. Transaction right user can change their right to view right and view right user can change to transaction right.

Profile Change	Users	Options
TRAN TO VIEW	RETAIL user will get three options	ACTIVATION CODE+OTP
		TXN PWD + OTP
		DEBIT CARD + OTP
	CORPROATE user will get two options	ACTIVATION CODE+OTP
		TXN PWD + OTP
VIEW TO TRAN	RETAIL user will get two options	ACTIVATION CODE+OTP
		DEBIT CARD + OTP
	CORPORATE user will get one options	ACTIVATION CODE+OTP

Services > Enable/Disable Transaction Access

### Enable/Disable Transaction Access

1 Beneficiary Details — 2 Preview and Confirm — 3 Summary

Transaction Access: **Disable Transaction**

\* Indicates Mandatory Fields

**CONTINUE**

Services > Enable/Disable Transaction Access

### Enable/Disable Transaction

OTP has being sent to registered Mobile Number (Ref no - BOB377)

1 Beneficiary Details — 2 Preview and Confirm — 3 Summary

Transaction Access: **Disable Transaction**

OTP\*

Remarks

Enter your credentials to confirm the transaction

Confirmation Details

Transaction Password\*

\* Indicates Mandatory Fields

**SUBMIT**