

Read the following instructions carefully before proceeding to enter the Investor Details:	
Important Note	<p>(i) Install the pre-requisite softwares to proceed. The path for the same is as follows: MCA Portal >> Investor Services >> IEPF >> IEPF Application >> Prerequisite Software</p> <p>(ii) Upload the excel file in the format xls only</p> <p>(iii) Do not make any changes in the excel format/sheet name. Also do not delete any tab/sheet in the file</p> <p>PLEASE NOTE: 1) Kindly ensure that Summation of amounts in the excel(s) should be equal to that in IEPF Form, else your excel shall get rejected.</p>
Steps to follow to fill details in the 'Investor Details' tab.	
Enable Macros	<p>It is important that you Enable Macro using following instructions :</p> <p>a) Excel 2000 and 2003: Tools->Macro->Security->Select 'Low'-->OK</p> <p>b) Excel 2007: Office Button->Excel Options->Trust Center->Trust Center Settings-->Macro Settings-->Enable all Macros-->OK</p> <p>PI Note : Close the Excel Sheet and re-open it after enabling Macro to start.</p>
Add Investor Details	<p>(i) Fill in the required details in <u>Columns A to X for Investor Details</u> (row 10 onwards)</p> <p>(ii) Follow the below mentioned validations for filling in the details.</p> <p>First Name -> Mandatory if 'Last Name' is blank and Length should be less or equal to 35 characters.</p> <p>Middle Name -> Length should be less or equal to 35 characters.</p> <p>Investor Last Name -> Mandatory if 'First Name' is blank and Length should be less or equal to 35 characters.</p> <p>Father/Husband First Name -> Mandatory if 'Father/Husband Last Name' is blank and Length should be less or equal to 35 characters.</p> <p>Father/Husband Middle Name -> Length should be less or equal to 35 characters.</p> <p>Father/Husband Last Name -> Mandatory if 'Father/Husband First Name' is blank and Length should be less or equal to 35 characters.</p> <p>Address -> Mandatory and Length should be less or equal to 300 characters.</p> <p>Country -> Mandatory and Select value from the dropdown.</p> <p>State -> Mandatory and Select value from the dropdown.</p> <p>(1) If the Country is "INDIA", the state should Indian state</p> <p>(2) If the Country is other than INDIA state should be "NA".</p> <p>District -> Select value from the dropdown.</p> <p>(1) If the Country is "INDIA", the district should be Indian districts corresponding to the State selected in dropdown.</p> <p>(2) If the Country is other than INDIA district will be "NA"</p> <p>Pin code -> Alphanumeric and Length should be either 6 or 12 digit</p> <p>Folio Number -> Mandatory and Length should be less than or equal to 20 characters.</p> <p>DP Id-Client Id-Account Number --> Each Id Should be separated by hyphens and maximum 60 characters allowed. Either Folio Number or DP Id-Client Id-Account Number should be mandatory</p> <p>Investment Type -> Select value from the dropdown.</p> <p>Amount Due -> Mandatory and should be greater than zero.</p> <p>Date of Event -> Mandatory and should be in DD-MON-YYYY format where 'MON' implies first three letters of Month.</p> <p>PAN -> Alphanumeric and Should be equal to 10 characters</p> <p>Date of Birth -> Should be in DD-MON-YYYY format where 'MON' implies first three letters of Month.</p> <p>Aadhar Number -> Should be exactly 12 digits.</p> <p>Nominee Name -> Length should be less than or equal to 100 characters.</p> <p>Joint Holder Name -> Length should be less than or equal to 100 characters.</p> <p>Remarks -> Length should be less than or equal to 100 characters.</p>
Save the Excel file	If you have multiple excels for the same CIN and SRN; use the different names for each excel
Upload the Excel file	Excel to be attached in the web form as an attachment.

