

# Online Client Software Change Request on LKP Web Portal

We have added a new module to the LKP Web Portal for all Online Trading Software change requests. You can now

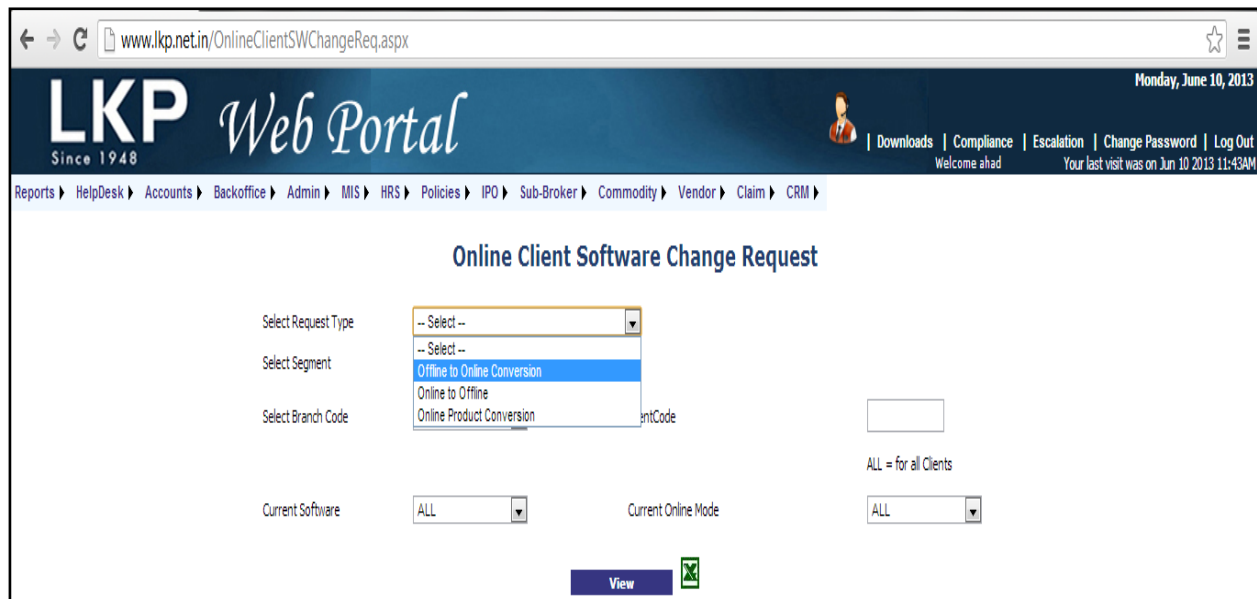
- Convert a client from Offline to Online
- Convert a client from Online to Offline
- Change the existing software from |ODIN – NEST| NEST- ODIN| or |WEB – EXE| EXE- WEB

Steps to be followed

1. Log onto LKP Web Portal
2. Admin → Online/ Offline Client → Software Change Request
3. Chose the category as shown below

## Categories

### 1. Offline to Online Conversion



The screenshot shows the LKP Web Portal interface for the 'Online Client Software Change Request' module. The page title is 'Online Client Software Change Request'. The form includes the following fields and options:

- Select Request Type:** A dropdown menu with '-- Select --' as the selected option.
- Select Segment:** A dropdown menu with three options: '-- Select --', 'Offline to Online Conversion' (highlighted in blue), 'Online to Offline', and 'Online Product Conversion'.
- Select Branch Code:** A text input field with a placeholder 'ClientCode'.
- Current Software:** A dropdown menu with 'ALL' as the selected option.
- Current Online Mode:** A dropdown menu with 'ALL' as the selected option.

At the bottom of the form, there is a 'View' button and a green 'X' icon. The page header includes the LKP logo, the date 'Monday, June 10, 2013', and navigation links for 'Downloads', 'Compliance', 'Escalation', 'Change Password', and 'Log Out'. The footer contains a navigation menu with links for 'Reports', 'HelpDesk', 'Accounts', 'Backoffice', 'Admin', 'MIS', 'HRS', 'Policies', 'IPO', 'Sub-Broker', 'Commodity', 'Vendor', 'Claim', and 'CRM'.

- A. Click on **“Offline to Online Conversion”**
- B. Select Segment i.e. **“Equity/ Commodity”**
- C. **“Select Branch Code”** or type in the **“Client Code”** to retrieve client details
- D. Click on **“View”** ( As shown below)

**Online Client Software Change Request**

Select Request Type: Offline to Online Conversion  
 Select Segment: Equity  
 Select Branch Code: 0 ClientCode:   
 Current Software: ALL Current Online Mode: ALL

**View**

Branch Code	Client Code	Term Code	Client Name	Activation Date	Last Trade Date	Digitalisation Status	Client Active Status	Client Online Status	Current Software	Current Product
02	2	21	CHHAYA PARESH MEHTA	26/06/2010	07/06/2013	N	Y	N	ODIN	<a href="#">Edit</a>
02	1	26	AARTI MITAL	26/06/2010	07/06/2013	N	Y	N	ODIN	<a href="#">Edit</a>
02	1	26	INDU MITAL	26/06/2010	07/06/2013	N	Y	N	ODIN	<a href="#">Edit</a>
02	2	20	PARESHKUMAR KANAKIA	26/06/2010	07/06/2013	N	Y	N	ODIN	<a href="#">Edit</a>
02	2	20	BHAIRAVI D. PANDYA	26/06/2010	06/06/2013	N	Y	N	ODIN	<a href="#">Edit</a>
02	1	13	LISMAN S QURESHI	26/06/2010	04/06/2013	N	Y	N	ODIN	<a href="#">Edit</a>
02	2	21	SHAKEEL HAIDER ABIDI	26/06/2010	07/06/2013	N	Y	N	ODIN	<a href="#">Edit</a>
02	2	20	DIPTI ASHIT KANAKIA	26/06/2010	06/06/2013	N	Y	N	ODIN	<a href="#">Edit</a>
02	1	46	SUSHIL SADANAND SAWANT	26/06/2010	17/05/2013	N	Y	N	ODIN	<a href="#">Edit</a>
02	2	20	CHAITANYA A MHASHELKAR	26/06/2010	04/06/2013	N	Y	N	ODIN	<a href="#">Edit</a>
02	1	11	SIDDIQUE YASIN QURESHI	26/06/2010	07/06/2013	N	Y	N	ODIN	<a href="#">Edit</a>
02	1	28	SURESH PRASAD MITAL	26/06/2010	03/06/2013	N	Y	N	ODIN	<a href="#">Edit</a>
02	2	21	SUDHIR B. PHANSE	26/06/2010	12/04/2013	N	Y	N	ODIN	<a href="#">Edit</a>
02	2	21	MOOTA LAXMINARAYANA	26/06/2010	22/03/2012	N	Y	N	ODIN	<a href="#">Edit</a>
02	4	41	LALSINGH BORA	26/06/2010	23/05/2013	N	Y	N	ODIN	<a href="#">Edit</a>
02	2	21	RITIKA KAILASH MALKANI	26/06/2010	05/06/2013	N	Y	N	ODIN	<a href="#">Edit</a>
02	2	26	SANTOSH S. GHANEKAR	29/12/2010	25/02/2013	N	Y	N	ODIN	<a href="#">Edit</a>

- E. Chose the client code and click on **“Edit”** ( Right-hand side)
- F. Client details will show in the new window as shown below

**Offline Client Software Change Request**

Segment: EQ Select Branch Code: 0  
 ClientCode: 28051 Client Name: AARTI MITAL  
 Current Status: Offline **New Status**: Online  
 Current Software: ODIN **New Software**: Select  
 Current Product: **New Product**:  
 Attachment:  No file chosen    
 Remarks:

- G. The “New Status” will show as “Online”
- H. Select the “New Software” i.e. ODIN / NEST
- I. Select the “ New Product” i.e. Web/ EXE
- J. Attach the relevant documents i.e. “offline to online letter” and any other supporting documents
- K. Please insert any remarks if necessary and click on “Save”

Please note that the page will NOT save unless the letter has been attached. Please ensure that all necessary documentation is provided while submitting the request. Incomplete forms will be rejected

## 2. Online to Offline Conversion

- A. Click on “Online to Offline Conversion”
- B. Select Segment i.e. “Equity/ Commodity”

- C. “Select Branch Code” or type in the “Client Code” to retrieve client details
- D. Click on “View”

Branch Code	Client Code	Term Code	Client Name	Activation Date	Last Trade Date	Digitalisation Status	Client Active Status	Client Online Status	Current Software	Current Product
02	02	2	CHHAYA PARESH MEHTA	26/06/2010	07/06/2013	N	Y	N	ODIN	Web
02	02	2	AAARTI METAL	26/06/2010	07/06/2013	N	Y	N	ODIN	Web
02	02	2	INDU METAL	26/06/2010	07/06/2013	N	Y	N	ODIN	Web
02	02	2	PARESHKUMAR KANAKIA	26/06/2010	07/06/2013	N	Y	N	ODIN	Web
02	02	2	BHAIKAVI D. PANDYA	26/06/2010	06/06/2013	N	Y	N	ODIN	Web
02	02	2	USMAN S QURESHI	26/06/2010	04/06/2013	N	Y	N	ODIN	Web
02	02	2	SHAKEEL HAIDER ABIDI	26/06/2010	07/06/2013	N	Y	N	ODIN	Web
02	02	2	DIPTI ASHIT KANAKIA	26/06/2010	06/06/2013	N	Y	N	ODIN	Web
02	02	2	SUSHIL SADANAND SAWANT	26/06/2010	17/05/2013	N	Y	N	ODIN	Web
02	02	2	CHAITANYA R. BHASHERKAR	26/06/2010	04/06/2013	N	Y	N	ODIN	Web
02	02	2	SIDDIQUE YASIN QURESHI	26/06/2010	07/06/2013	N	Y	N	ODIN	Web
02	02	2	SURESH PRASAD MITAL	26/06/2010	03/06/2013	N	Y	N	ODIN	Web
02	02	2	SUDHIR B. PHANSE	26/06/2010	12/04/2013	N	Y	N	ODIN	Web
02	02	2	MOOTA LAXMINARAYANA	26/06/2010	22/03/2012	N	Y	N	ODIN	Web
02	02	4	LALSINGH BORA	26/06/2010	23/05/2013	N	Y	N	ODIN	Web
02	02	2	RITIKA KAILASH MALKANI	26/06/2010	05/06/2013	N	Y	N	ODIN	Web
02	02	2	SANTOSH S. GHANEKAR	29/12/2010	25/02/2013	N	Y	N	ODIN	Web

- E. Chose the client code and click on “Edit” ( Right-hand side)
- F. Client details will show in the new window as shown below

The screenshot shows the 'Offline Client Software Change Request' form in the LKP Web Portal. The form is titled 'Offline Client Software Change Request' and contains the following fields and controls:

- Segment: EQ
- ClientCode: 2
- Current Status: Online
- Attachment: Choose File (No file chosen)
- Remarks: A large text area for entering remarks.
- Select Branch Code: A dropdown menu.
- Client Name: MALA
- New Status: Offline (selected in a dropdown menu)
- Buttons: Upload, View Image, and Save.

- G. The “New Status” will show as “Offline”
- H. Attach the relevant documents i.e. “online to offline letter” and any other supporting documents
- I. Please insert any remarks if necessary and click on “Save”

Please note that the page will NOT save unless the letter has been attached. Please ensure that all necessary documentation is provided while submitting the request. Incomplete forms will be rejected

### 3. Online Product Conversion

The screenshot shows the 'Online Client Software Change Request' form in the LKP Web Portal. The form is titled 'Online Client Software Change Request' and contains the following fields and controls:

- Select Request Type: A dropdown menu with options: -- Select --, -- Select --, Offline to Online Conversion, Online to Offline, and Online Product Conversion (highlighted).
- Select Segment: A dropdown menu.
- Select Branch Code: A dropdown menu.
- ClientCode: A text input field.
- Current Software: ALL (selected in a dropdown menu)
- Current Online Mode: ALL (selected in a dropdown menu)
- Buttons: View and a green icon button.

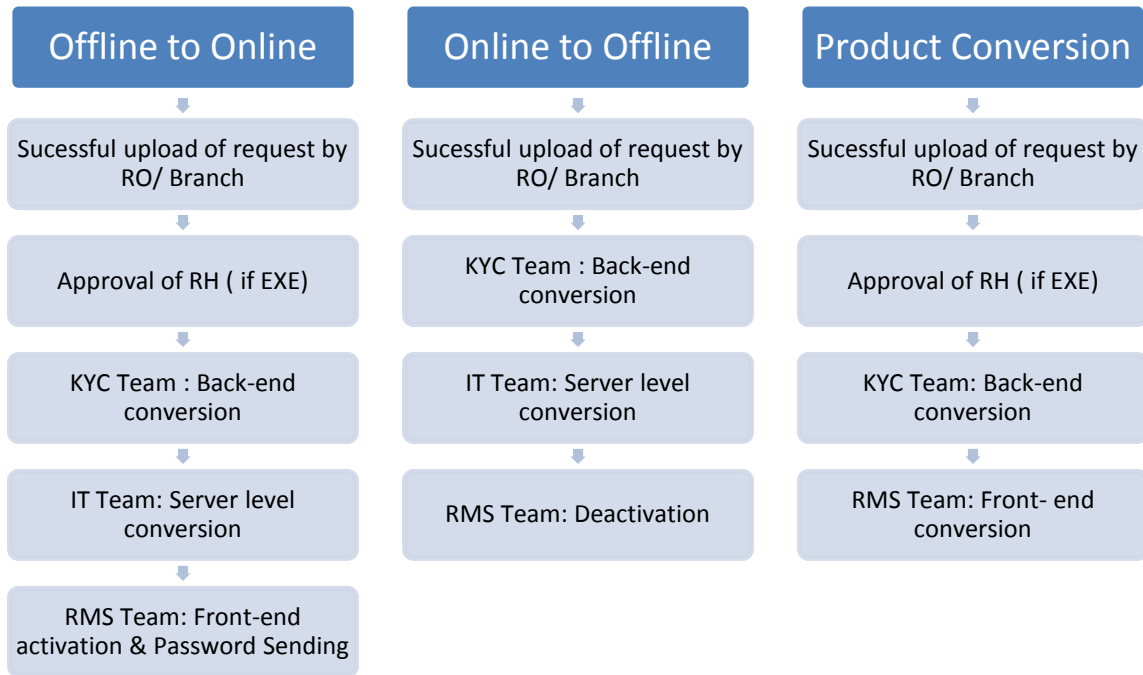
- Click on “ Online Product conversion
- Select Segment, chose either **Equity/Commodity**
- “**Select Branch Code**” or type in the “**Client Code**” to retrieve client details
- Custom filter has also been provided for “**Current Software**” type, i.e. NEST/ODIN and “**Current Online Mode**” i.e. WEB/EXE
- Click on “**View**”

Zone	Branch Code	Client Code	Term Code	Client Name	Activation Date	Last Trade Date	Digitalisation Status	Client Active Status	Client Online Status	Current Software	Current Product	Change Software	Change Product	Remarks
0	02	11	17	RAJENDRA DALPATRAI MEHTA -ONLI	26/06/2010	03/06/2013	N	Y	Y	ODIN		ODIN	2E	
0	02	20	20	PREETI DIPEN PAREKH-ONLINE AC	26/06/2010	05/06/2013	N	Y	Y	ODIN	2E	ODIN	2E	
0	02	11	17	DHANA L BORA (ONLINE)	26/06/2010	14/09/2012	N	Y	Y	ODIN		ODIN	2E	
0	02	11	17	VIVEK B KANSARA	02/12/2010	18/07/2011	N	Y	Y	ODIN		ODIN	2E	
0	02	11	17	RAKESH BHAYANA	31/12/2010	21/02/2012	N	Y	Y	ODIN		ODIN	2E	
0	02	11	17	DEEPAKUMAR S JAIN	23/02/2011		N	Y	Y	ODIN		ODIN	2E	
0	02	20	20	VANDANA S. KHANDEKAR-ONLINE	26/06/2010		N	N	Y	ODIN		ODIN	2E	
0	02	11	17	RAKESH ASHOK PATIL-ONLINE	26/06/2010		N	Y	Y	ODIN		ODIN	2E	
0	02	40	40	RAMKUMAR KHANDELWAL -ONLINE	26/06/2010		N	Y	Y	ODIN		ODIN	2E	
0	02	40	40	NIRMAL R KHANDELWAL -ONLINE	26/06/2010		N	Y	Y	ODIN		ODIN	2E	
0	02	40	40	SHUJAUDDIN S. SHAIKH-ONLINE	26/06/2010		N	Y	Y	ODIN		ODIN	2E	
0	02	20	20	AADESH SURESH JAIN	26/06/2010		N	Y	Y	ODIN		ODIN	2E	
0	02	2	2	MAHESH KISHEN	26/06/2010		N	Y	Y	ODIN		ODIN	2E	

- Client details will be displayed as shown above
- For each client you can “**Change Software**” i.e. ODIN/ NEST &
- For each client chose the “**Product**” i.e. WEB/EXE
- Click “**Save**”

**Please note the following**

1. After the request has been successfully uploaded



2. All conversions to EXE either on ODIN/ NEST will be sent to the RH for approval before processing at HO
3. Ensure that all necessary documents are attached with the signatures are uploaded correctly to avoid rejections
4. All passwords to be sent to the client will be on BOD basis
5. Ensure that the client and dealer have the same type of software, i.e.

ODIN
<ul style="list-style-type: none"><li>• Blue (Silverlight)</li><li>• Blue Star ( ODIN Diet)</li></ul>

NEST
<ul style="list-style-type: none"><li>• Blue+ (Nest Web)</li><li>• Blue ++ (Nest EXE)</li></ul>