

# TECHVOTE: e-Voting System

USER MANUAL

(ENTITY: CUSTODIAN/MF)

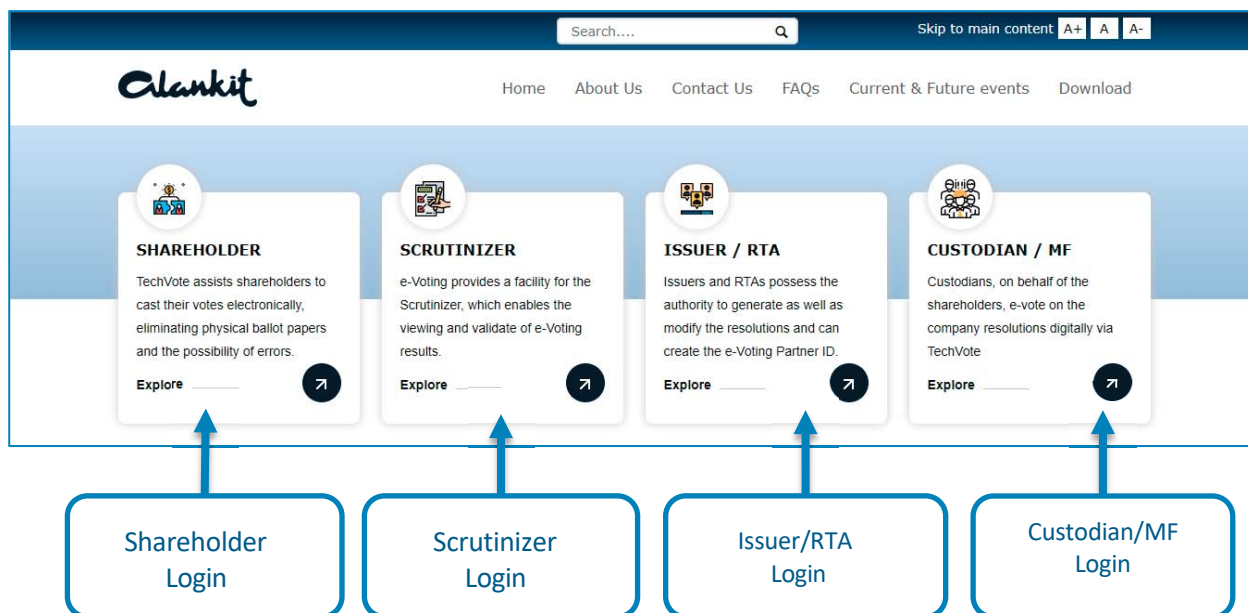
<b>Client</b>	Alankit Assignments Limited
<b>Project</b>	Techvote
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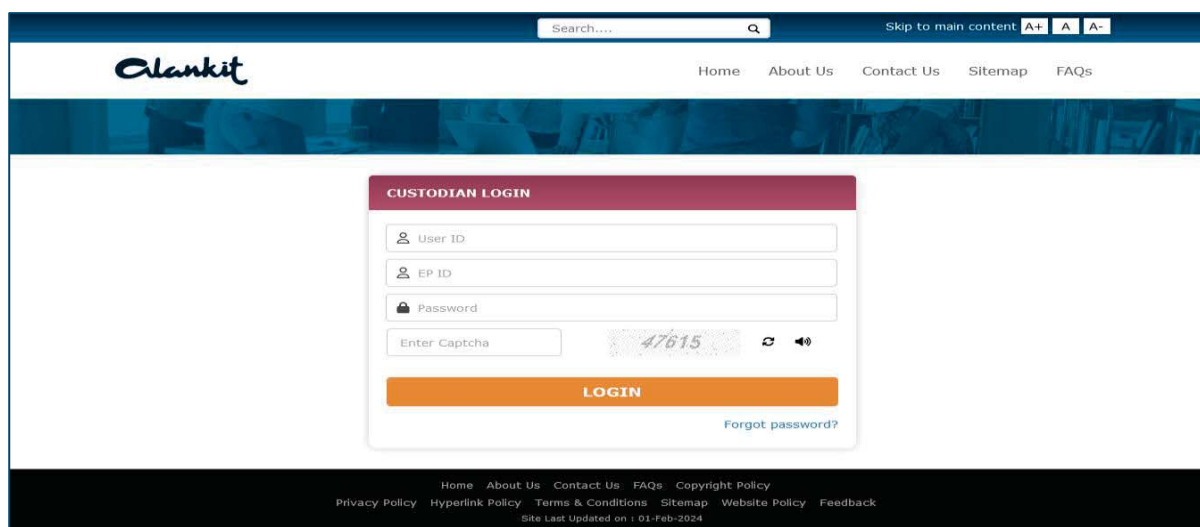
## INTRODUCTION

The 'Home Page' acts as the main gateway to the Service Module, enabling Issuers, RTAs, Scrutinizers, and Custodians/MFs to register or log in. Pre-registered Shareholders/Investors can also access the system through this page. Users can easily return to the 'Home Page' at any time by clicking on the 'Alankit' logo located at the top-left corner of the page.



## CUSTODIAN LOGIN

Selecting the Custodian user will be redirected to the Custodian login page. Enter the **User ID**, **EP ID**, **Password** and **Captcha** and click on “Login” button.



Custodian receives the login credentials (User ID, EP ID & System Generated password) over registered mail id. The custodian user needs to reset their password after the first login.

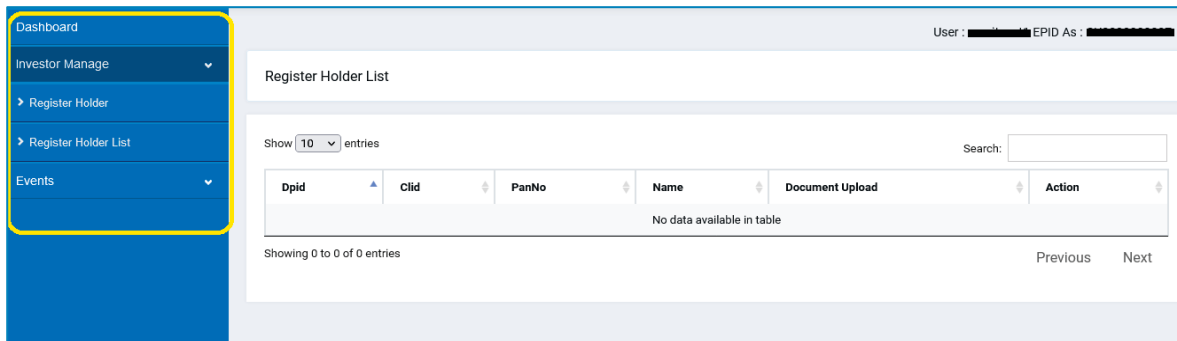
## DASHBOARD

Upon successful log in custodian user will get the following options displayed on their dashboard:

- **Dashboard**
- **Investor Manage**
- **Events**

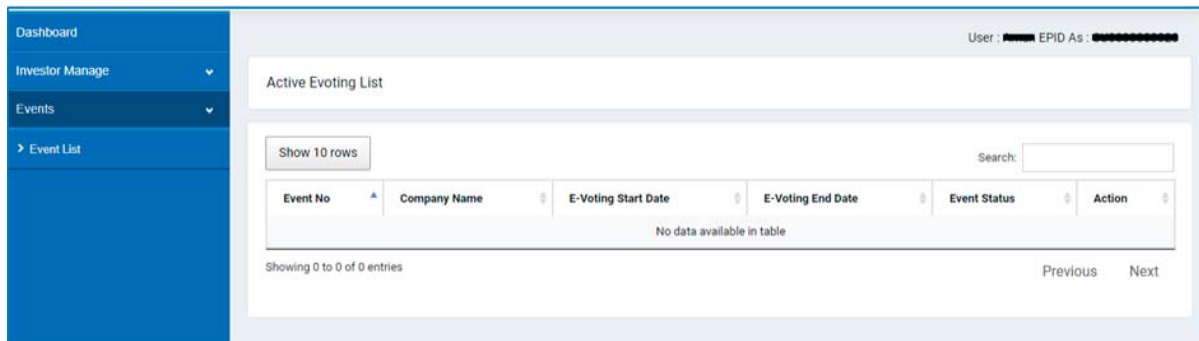
Upon clicking '**Investor Manage**', the Custodian will get below options:

- Register Holder
- Register Holder List



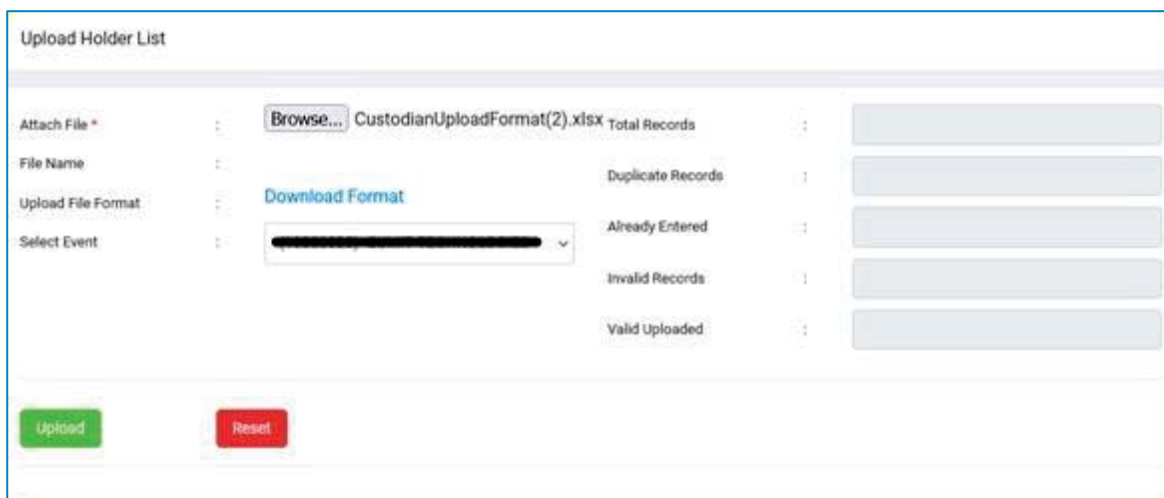
On clicking '**Events**', the Custodian will get below option:

- Event List



### REGISTER HOLDER

This option enables the custodian user to upload the holder list and select the event. Upon clicking on the 'Register Holder', the Custodian user can upload the holder list file from 'Browse' tab, as shown in the image below. The custodian user may download the holder list file format from the 'Download Format' link provided.



The excel format of shareholder list file to be uploaded is shown below:

DPID	CLID	PANNO	FNAME	IMAGEPATH

Upon successful uploading of the shareholder list file, custodian user will have the option to download an output file which will show the status of the uploaded file. This output file checks whether the shareholder list file was successfully uploaded or if any rectifications are required.

### SUCCESS FILE UPLOAD

After the successful submission of the uploaded file, an excel file for the same will be downloaded, displaying the remarks as shown in the image below:

DPID	CLID	PANNO	FNAME	IMAGEPATH	Remarks
██████████	██████████	██████████	██████████	██████████	Valid Uploaded

### INVALID FILE UPLOAD

If the file uploaded has errors/not successful, then the Excel file downloaded for the same will display remarks as shown in the image below:

DPID	CLID	PANNO	FNAME	IMAGEPATH	Remarks
██████	██████	██████████	██████████		##Invalid DPID ##Invalid CLID

### REGISTER HOLDER LIST

Upon successful upload, the shareholder list can be accessed under the option ‘Register Holder List’ as shown below where the custodian user can view details, delete shareholder or upload document against the said shareholder.

The screenshot shows a table with columns: Dpid, Clid, PanNo, Name, Document Upload, and Action. The Action column contains buttons for 'Upload Doc', 'View', and 'Delete'. Three callout boxes provide instructions:
 

- 'To View the uploaded document, Custodian needs to click on the view button.' (points to the View button)
- 'If POA not uploaded, then document status will show pending' (points to the Document Upload column)
- 'To upload the document, Custodian needs to click the button.' (points to the Upload Doc button)
- 'To De-register the shareholder, Custodian needs to click on the Delete button' (points to the Delete button)

By clicking on the ‘View’ button, Custodian can access detailed information of the shareholder, including **document details, DP ID, Client ID, Name and PAN** as shown in the image below:

The screenshot shows the 'Investor Detail' page. On the left, there are input fields for 'Dp Id', 'Client Id', 'Name', and 'Pan'. On the right, there is a PDF viewer window showing a document titled 'Sample PDF'.

## EVENT LIST

Once the shareholder list upload is successful, custodian can click on the 'Event List' to view the events for which shareholders need to cast their votes.

Event No	Company Name	E-Voting Start Date	E-Voting End Date	Event Status	Action
██████████	██████████	5/30/2024 9:00:00 AM	6/3/2024 5:00:00 PM	Voting in Process	<a href="#">Cast Vote</a>

Showing 1 to 1 of 1 entries

Previous 1 Next

Once the user clicks on the cast vote button, the below screen will appear:

Evnt Detail: ██████████ Voting Right: 15000

### Resolution List

- Ordinary check of shareholder
- share Split 1:37
- Director election

PubCo/Opnd-ClientId	Name	Holding	Resolution 1	Resolution 2	Resolution 3
██████████	██████████	██████████	Assent: ██████ Dissent: ██████	Assent: ██████ Dissent: ██████	Assent: ██████ Dissent: ██████

[Submit](#) [Reset](#)

The Custodian user reviews the resolution list uploaded by the company as below, in which there is a grid displaying the voting rights of the shareholder against each resolution. Custodian can cast the votes **FOR OR AGAINST** each resolution, as illustrated below:

Evnt Detail: ██████████ Voting Right: 15000

### Resolution List

- Ordinary check of shareholder
- share Split 1:37
- Director election

PubCo/Opnd-ClientId	Name	Holding	Resolution 1	Resolution 2	Resolution 3
██████████	██████████	██████████	Assent: ██████ Dissent: ██████	Assent: ██████ Dissent: ██████	Assent: ██████ Dissent: ██████

[Submit](#) [Reset](#)

After selecting the assent for the said resolutions, click on 'Submit' to vote in favor of the resolutions on behalf of the shareholders.