



<https://pmssip.questinvest.com>

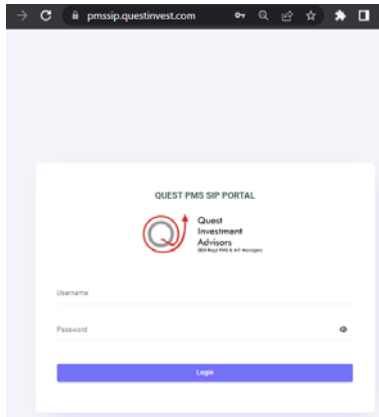
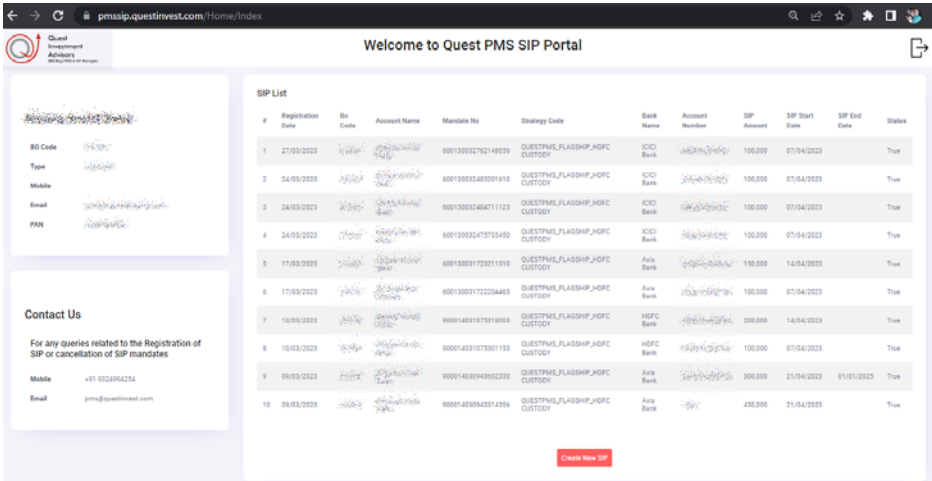
Quest PMS SIP Portal is an online service provided by Quest Investment Advisors for its existing clients to register eMandate and invest by means of SIP linked to PMS Account

PMSSIP Portal Summary

1. Start portal go to <https://pmssip.questinvest.com>
2. Login Page
3. Home Page
 - a. View Existing PMS SIP Application and Status
 - b. Create New SIP
4. Create New PMS SIP Application
 - a. Stage 1 - Provide Details on PMSSIP Website
 - b. Stage 2 – Submit details / Authorize Mandate on your Bank Website
5. Logout



Quest PMSSIP Portal – User Guide

#	Link / Page	Details
1		<p>Goto https://pmssip.questinvest.com</p> <ol style="list-style-type: none"> 1. Login 2. User & Password – Same as Client Portal (https://investor.questinvest.com) 3. Click on Login to authenticate to gain access to the Portal, takes you to Home Page 4. As per statutory regulations this service cannot be provided to NRI and OCB entities
2		<p>Home Page</p> <ol style="list-style-type: none"> 1. Your Account Details – Showing Your Account Name and Basic Account Details 2. Contact Us – Showing contact number and email of Quest Team to connect with in case of any queries related to the account or using the PMSSIP portal. 3. SIP List – Showing details of your attempts made to Create SIP and status for the same. 4. Create New SIP – Click will take you to Create SIP Page to create a new plan for Investment and register SIP linked to your PMS Account



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The screenshot displays the 'Create SIP Page' on the Quest PMSSIP Portal. The page title is 'Welcome to Quest PMS SIP Portal'. It features a navigation menu on the left with links for 'Home', 'About Us', 'Contact Us', 'FAQ', 'Privacy Policy', and 'Terms & Conditions'. The main content area is divided into three sections: 'Strategy', 'Bank Details', and 'SIP Details'. The 'Strategy' section has a search box for a strategy and a 'Submit' button. The 'Bank Details' section includes fields for Bank Name, Bank Account Number, and Confirm Bank Account Number, along with IFSC Code and Account Type (Saving (SB) or Current (CA)). The 'SIP Details' section includes fields for SIP Amount, SIP Start Date, and SIP End Option (SIP End Date or Until Cancelled). A 'Submit' button is located at the bottom of the 'SIP Details' section. A 'Contact Us' sidebar on the left provides contact information for queries related to SIP registration and cancellation.

Create SIP Page

Registration of eMandate will be completed by providing details on this Page.

Stage 1

Submit your details for eMandate Registration purpose.

1. Strategy
2. Bank Details
3. SIP Details

Stage 2

1. Hereon above details which you have submitted will be provided for eMandate Registration.
2. You will be connected to NPCI web portal and your own bank account portal for authorization and registration of your SIP application.
3. Finally, you will back to Quest PMSSIP portal and shown status of your registration

Please feel free to contact Quest team for any queries related to this process or any assistance required.



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Strategy :

Search for a strategy

Stage 1 - Strategy

Select the Strategy / PMS Account from the list of existing Account details which you have and click on Submit.

You will see multiple accounts here if you have more than one PMS account with Quest with common PAN card Number.

Funds paid via SIP will be added to the selected PMS Account.

For clients onboarded before 21st Jan 2020, Min NAV of portfolio balance should be 50 L or above. You can choose a strategy only if this criterion is met.

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Bank Details :

Bank Name Bank Account Number Confirm Bank Account Number

IFSC Code Account Type Saving (SB) Current (CA)

Stage 1 – Bank Details

Provide details of your bank from which Payment towards SIP will be made.

Bank Name – Select the Bank from the list of banks provided. List will appear as you type few characters of your bank name.

Bank Account Number and Confirm Bank Account Number – Enter the Account Number of your bank, should be same in both fields.

IFSC Code – Enter IFSC Code of your bank.

Account Type – Choose the type of your Account.

Click Submit – Online Validation of your Bank Account will be done. A message will appear which will inform you of the status of the validation.



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It should be good to go if there is some mismatch between your name as per Quest Account and Bank Account. However, if you have any doubts, we suggest you contact and check with Quest team for assistance

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SIP Details :

SIP Amount: Please select

Day on which every month SIP will be processed: 7 14 21

SIP Start Date: SIP Start Date

SIP End Option: SIP End Date Until Cancelled

Submit

Stage 1 – SIP Details

Select SIP details as per your per investment plans here.

SIP Amount – Choose the Monthly SIP Amount from the list starting from 100,000 upto 10,00,000 in multiples of 50K.

Day on which SIP will be processed – SIP will be processed once every month on the day which you choose here.

SIP Start Date – Starting will be automatically from next month on the day as selected. E.g., If today is 5th August 2022 and Day selected is 21, then SIP start date will be 21st Sept 2022.

SIP End Option – Your option is to either specify an exact date on which SIP should stop or else choose Until Cancelled

A minimum tenure of one year is mandatory for SIP investment.

When you choose SIP End Date – You can select any date after one year for SIP to stop. A minimum period of one year is mandatory.

When you choose Until Cancelled – the SIP will stop after you give specific instructions **atleast a month in advance** to Quest Team

Click Submit



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The screenshot shows a dialog box titled "E-Mandate Registration Process" with the following content:

E-Mandate No: [Redacted]

Status: Success

Response Code: EmRes001

Note that the details submitted have been validated and now process of E-Mandate Registration will begin from here.

During this process you will now get be redirected to web portal of NPCI (National Payment Corporation of India) and also your own Bank Account. After completion of steps on these websites, you will return back to Quest PMS SIP web portal.

Finally you will be able to view the final status of your registration back here and also get an update on your email id.

At the bottom, there are two buttons: "Cancel" (red) and "Start E-Mandate Registration" (blue).

All the details submitted are stored and an eMandate Number is generated.

Click on Start E-Mandate Registration for **Stage 2 to begin**.

Further the journey will be through different portal redirected in the following sequence.

1. QuickChec
2. NPCI
3. Your Bank Login Page
4. Back to NPCI
5. Back to QuickChec
6. Back to Quest PMSSIP Portal

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Important Guidelines:

1. Amount should not be more than INR 10 Lakh.
2. Net-Banking authorization can be done for the accounts being singly operated or handled.
3. IFSC or MICR should be of 11 characters and 9 characters respectively.
4. Authentication Modes availability is subject to bank live status at NPCI.
5. Account Type indicates as below:
 - SB: Savings Account
 - CA: Current Account
 - CC: Cash Credit account
 - SB-NRE: Savings Account-Non-Residential External account
 - SB-NRO: Savings Account-Non-Resident Ordinary account

QUEST INVESTMENT ADVISORS PVT LTD
Mandate Summary
Customer Information

Name: [Redacted]
 Mobile No.: [Redacted] Telephone No.: [Redacted]
 Email ID: [Redacted]
 Bank: [Redacted]
 Account Type: [Redacted] Account No.: [Redacted]
 Amount(INR): [Redacted]
 Start Date: [Redacted] End Date: [Redacted]
 Frequency: [Redacted] Purpose of Mandate: [Redacted]

Authentication Mode: Net Banking
 Select
 Debit Card
 Net Banking

Corporate Name: [Redacted]
 Utility Number: NACH00000000000772

Note: You are in the process of E-Mandate registration. Please proceed to continue with the registration process. In case of any discrepancy found, please do not proceed and contact QUEST INVESTMENT ADVISORS PVT LTD.

Proceed

NACH E-Mandate Powered by **NPCI**

* Please note do not try to re-register mandate with this link if authenticated/registered through Net-Banking or Debit Card at bank's website.

Stage 2 – QuickChec Portal

You are redirected to QuickChec Portal

Here you find all the details you have provided auto filled in and it does not require any changes and remains locked.

You need to only choose your method of authentication on your Bank Account Page – Debit Card or Net Banking

Click on Proceed to continue.

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QUEST INVESTMENT ADVISORS PVT LTD
Mandate Summary
Customer Information

Are you sure you want to proceed?

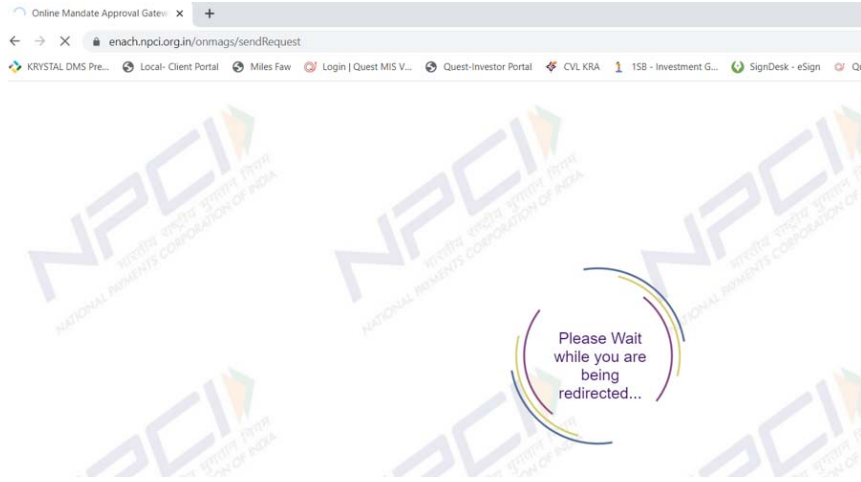
Yes No

Stage 2 – QuickChec Portal

Click on Yes to Proceed further.

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Stage 2 – NPCI Page

You will be redirected further to NPCI portal as processing continues as per statutory requirements for processing from government

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The screenshot shows the ICI Bank payment gateway interface. At the top, it says 'Please check mandate details before confirmation'. Below this, there are two columns of details:

NPCI Ref No e1b40db1fe9447efa58b24fb15ab528c	Utility Code NACH00000000060772
Service Provider Name QUEST INVESTMENT ADVISORS PVT LTD	Sponsor Bank IFSC KKBKORTGSMI
A/C Holder Name [Redacted]	A/C Number [Redacted]
Occurrence RCUR	Recurring Frequency MNTH
Mandate Amount 100000.00	Amount Type Maximum
First Collection Date 2023-04-07+05:30	Final Collection Date [Redacted]
UMRN No. [Redacted]	

At the bottom, there is a checkbox: I have checked the mandate details and I found it correct. I wish to proceed for authentication. Below the checkbox is a 'Submit' button.

Stage 2 – Your Bank Account Page

You will be redirected to your own Bank Account Page

The appearance of this page may change based on your Bank Website Portal theme or interface.

This will show the same details which you have originally submitted on Quest Portal

Click on Submit to continue further



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Log in to Internet Banking x WhatsApp x +
shopping.icicibank.com/corp/BANK/WAY
KRYSTAL DMS Pre... Local - Client Portal Miles Fee Login | Quest MIS V... Quest-Investor Portal CVL KVA 1 158 - Investment G... SignDesk - eSign Quest

ICICI Bank

Payment through ICICI Bank

ICICI Bank Savings A/c ICICI Bank Corporate A/c

User ID

Password

Login

Payments made through this facility cannot be stopped or modified.

Stage 2 – Your Bank Account Page

Your Bank Login Page

The appearance of this page may change based on your Bank Website Portal theme or interface.

Enter the credentials of your Bank Account here and continue.

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ICICI Bank Limited [IN] | https://shopping.icicibank.com/corp/AuthenticationController?sessionId=0000V16R6KqR_zphME1pHiz2Kc5S1B5dgc67owayparam=TDicKk8

ICICI Bank
Wealth Management

eNACH Registration

Mandate request Initiate Party's Category
Description

Name of Initiator

Collection Amount (INR)

Max Amount (INR)

Recurring Frequency

First Collection Date

Final Collection Date

Please enter these details to authorize the transaction

One Time Password

OTP has been generated and sent to your registered Mobile Number

If there is a delay in receipt of OTP, you can send a request to receive it. SMS (OTP) to 5576766 or 9215676766. Request should be sent from the mobile number registered in our records.

Please do not share OTP with anyone, even if the person claims to be an ICICI Bank official. For further details please [click here](#).

CANCEL SUBMIT

Stage 2 – Your Bank Account Page

The appearance of this page may change based on your Bank Website Portal theme or interface.

The purpose of this step will be authorized the Registration by entering proper login / OTP details related to your bank account.



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The screenshot shows a web browser window with the URL <https://enach.npci.org.in/onmags/bankResponse>. The page title is "Mandate Approval Automation" with the NPCI logo. The main heading is "Transaction Status". Below this, there are several input fields with their respective values:

Message Id	44340884922a48cb74b4443690a0d49
NPCI Reference Id	99e77db576546a5b7009952cc53b31a
Accepted	true
Acceptance Reference Number	512
Debitor IFSC	ICIC0006626

At the bottom, there is a link: "Click Here to return back to merchant site or you will redirected to merchant site in 10 seconds".

Stage 2 – Back to NPCI Portal Page

You will be redirected to NPCI Portal

The status of your E-Mandate Registration will be shown here

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The screenshot shows a web browser window with the URL <https://demo.qchc.in/Payment/EsignResponse.aspx?ErrorCode=Mandate%20registration%20successfully%20completed&MandateId=C!tsrkpm7jHzE>. The page has a red header with the QuickChec logo. The main content area is a light gray box with a blue checkmark icon and the text "Mandate Accepted". Below this, there is a list of details:

- » Accept Reference No. is : 512
- » Status is : 512
- » MsgId is : 99e77db576546a5b7009952cc53b31a
- » NPCI Reference No. is : 44340884922a48cb74b4443690a0d49
- » Response Message is : Mandate registration successfully completed

Stage 2 – Back to QuickChec Portal Page

You will be redirected to QuickChec Page

Here you will see reference number of the application registered, status, message and Response



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E-Mandate registration Successful.

Mandate ID	45
Date	20/08/2018
Customer Name	XXXXXXXXXXXX
Strategy Name	XXXXXXXXXXXXXXXXXXXXXXXXXXXX
BO Code	XXXXXX
Bank Name	XXXXXXXXXXXXXXXXXXXX
SIP Date From	XXXX/XXXX
SIP Amount	XXXXXX

[Back](#)

Stage 2 – Back to Quest PMSSIP Portal

Finally redirected Back to Quest PMSSIP Portal

You will see details of registration and Status of the same.

End of Stage 2 and eMandate Registration

Check your email account for communication sent regarding Registration of EMandate

Please contact Quest PMSSIP Support Team for any assistance on pms@questinvest.com or +91 9324994254