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बैंकिंग प्रौद्योगिकी विकास और अनुसंधान संस्थान
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Handbook for Individual Subscribers



1. INTRODUCTION	3
2. ENROLL FOR NEW USER	3
3. LOGIN	4
3.1.1. Login using Mobile OTP	4
3.1.2. Login using eKYC ID & PIN	4
3.2. DASHBOARD	4
3.2.1. Complete eKYC	4
4. INDIVIDUAL LOGIN AFTER EKYC APPROVAL FROM CA	6
4.1. SUBSCRIBER AGREEMENT	6
4.2. DSC APPLICATION FORM	6
4.3. MANAGE CERTIFICATE	6
4.4. DIFFERENT TYPE OF CERTIFICATE SETUP AND DOWNLOAD FLOW	7
4.4.1. Signature class 3 individual	7
4.4.2. System class 3 individual	8
4.4.3. Encryption class 3 individual	9
4.4.4. Individual (Encryption + Signature)- Class 3	9
4.5. REVOKE CERTIFICATE	11
4.6. SUSPEND CERTIFICATE	11
4.7. ACTIVATION CERTIFICATE	11
4.8. REISSUE CERTIFICATE	11
4.9. MY SUBSCRIPTION	12
4.10. PURCHASE ESIGN	12
4.11. UPLOAD & ESIGN	12
4.12. ESIGN TRANSACTIONS	13
4.13. PURCHASE DSC	13
4.14. DSC SETUP AND DOCUMENT UPLOAD	13
4.15. SUBMIT FOR VERIFICATION	13
4.16. CA APPROVAL	13
4.17. DSC ESIGN AND CERTIFICATE DOWNLOAD	13



1. Introduction

This document provides a comprehensive user manual for IDRBT users interacting with the Subscriber Portal. It covers every step involved in the subscriber registration, eKYC process, DSC/eSign purchase, and certificate management.

2. Enroll For New User

For new subscribers who do not have an existing account, the 'Enroll for New User' option must be used.

Clicking this option displays a registration form where the subscriber enters their mobile number and captch. After clicking 'Get OTP', an OTP is sent to the registered mobile number. This OTP must be entered in the provided field to verify the mobile number before proceeding to the next step.

This step focuses on the mobile number verification process. The subscriber receives a One-Time Password (OTP) via SMS. The OTP must be entered in the field marked 'Mobile OTP'. Clicking the 'Next' button confirms the mobile verification and proceeds to the email registration step.

After successful mobile OTP verification, the subscriber is prompted to enter their email address. Once entered, an OTP is sent to the email for validation. This is an essential step to confirm the authenticity of the subscriber's email address. Subscriber must click on "Verify Email OTP". After entering the email OTP, the subscriber has to proceed to set their login PIN.

After both mobile and email OTPs are successfully verified, the subscriber is prompted to complete the remaining registration fields. These include setting a 'Login PIN' and confirming it. Once all fields are filled, clicking the 'Create Account' button completes the registration. A success message will confirm that the account has been created.

The subscriber will be shown a Subscriber Agreement, click on the link. This document outlines the terms and conditions that govern the use of digital signature services. The subscriber must read the agreement and then click 'Agree & Sign' to accept the terms. This is a mandatory step for using the DSC/eSign services after which they can click on the checkbox.

NOTE: If the subscriber enters an incorrect OTP during enrollment, an "Invalid OTP" pop-up message will be displayed. If the subscriber enters an incorrect OTP **three times consecutively**, their account will be **temporarily blocked**.

While registering Email ID, if subscriber is entering incorrect OTP, they will receive a pop-up message as below:

If the subscriber enters an incorrect OTP during enrollment, an "Invalid OTP" pop-up message will be displayed. If the subscriber enters an incorrect OTP **three times consecutively**, their account will be **temporarily blocked**.

NOTE: While entering the Login PIN, the subscriber must avoid using simple or easily guessable sequences (for example, 12345678 or 11223344); if such a serial or repetitive PIN is entered.

The system displays a pop-up warning message instructing the subscriber to choose a stronger PIN.

After accepting the Subscriber Agreement, the system confirms the creation of the account. This confirmation ensures that the subscriber's registration and agreement acknowledgement are complete. The subscriber is now allowed to log in using the mobile number and begin the eKYC and DSC/eSign purchase journey.



Once the account is created, a welcome email is sent to the registered email address. This email confirms the registration and includes details such as login ID or further instructions for proceeding. The subscriber should retain this email for future reference.

3. Login

3.1.1. Login using Mobile OTP

Subscribers can log in to the portal by entering their registered mobile number, captcha and click on 'Get OTP'. OTP will be sent on the registered mobile, verifying the OTP the subscriber can access the portal by clicking the 'Login' button. This method ensures secure access and is applicable for users who have already completed the registration.

If they enrolled as Individual, they must select Individual radio button.

If they enrolled as organization, they must select organization radio button.

If the subscriber is entering wrong OTP they will get a pop up as below,

After 3 incorrect attempts, there will be a pop-up as below:

Again after 15 minutes, if the subscriber is entering wrong OTP. If they are entering wrong OTP thrice, the account will be blocked and they will get a pop up as below, they will have to contact administrator to unblock.

3.1.2. Login using eKYC ID & PIN

The subscriber must enter their eKYC ID, PIN, and the displayed captcha, then click Validate PIN. After successful validation, an OTP is sent to the registered mobile number. The subscriber must enter the OTP and click Login to access the portal.

3.2. Dashboard

Upon successful login, the subscriber is redirected to the Dashboard. The Dashboard provides a consolidated view of the account including eKYC status, subscription plans, recent transactions, signed documents, and quick links for performing key activities such as completing eKYC.

3.2.1. Complete eKYC

Before purchasing DSC or initiating eSign transactions, the subscriber must complete the eKYC process. From the Dashboard, the subscriber can click on the 'Complete eKYC' button or navigate through the menu. The eKYC page offers options to select plans and provide identity details such as Aadhaar and PAN.

Step1: Select Plan

The subscriber needs to select a purchase plan before proceeding with identity verification. The subscriber can choose between different DSC or eSign plans by selecting 'Purchase Plan'.

After choosing to purchase a DSC or eSign plan, the subscriber can select the desired plan from a dropdown list. Once a plan is selected, the details of the plan will be displayed on screen for review before proceeding to payment.

After reviewing the plan, the subscriber proceeds to make payment using the available gateways. The subscriber can choose to pay via debit/credit card or net banking. Once the payment method is selected, the subscriber is redirected to the bank portal to complete the transaction.



- After successful payment, a confirmation message is displayed. This confirms that the transaction has been completed and allows the subscriber to proceed with the eKYC process. A receipt or transaction ID may also be generated at this stage.
- A confirmation email containing the invoice for the purchase is sent to the subscriber's registered email address. This email includes the transaction ID, plan details, and the amount paid for recordkeeping purposes.

Step 2: Organization Details:

If the subscriber has a GSTIN, they should select "Yes", enter the GSTIN in the GSTIN field, and click Verify GSTIN to validate the number before proceeding.

- Address page will pop up after verification as below, subscriber must select the relevant address
- Once GSTIN is verified successfully, all the details will be fetched automatically
- Subscriber must click on save and proceed after verification.
- If they want to edit GSTIN number, they can click on edit details and change it.

If the subscriber selects "No" for GSTIN in Step 2 – Organization Details, they must manually enter all organization information, including Organization Name, Organization PAN, CIN (if applicable), full address (Address, Street Name, Locality/Colony, Town/Suburb/Village), Country, State, District/City, and Postal Code, and then click Save and Proceed to continue with eKYC process.

If they want to edit any details, they can click on edit details and change it.

Step3: Applicant Details

Step-by-Step Process for eKYC Using Aadhaar (OTP) Method

1. Select eKYC Method

Begin by logging into the portal and choosing your preferred eKYC method.

2. Aadhaar Authentication

- You are redirected to an Aadhaar eKYC user authentication screen.
- Enter your Aadhaar number or VID (Virtual ID), agree to the consent statement, and click SEND OTP.
- An OTP is sent to your Aadhaar-linked mobile. Enter this OTP on the screen to continue.

3. PAN Details Submission

- Once your Aadhaar OTP is successfully verified, proceed to enter your PAN number. Full name and DOP will be auto fetched.
- Click Next. The portal verifies your PAN credentials in real time.
- If the PAN number is incorrect, pop up will appear as below.

4. Record Video for IPV (In-Person Verification)

- After successful PAN verification, proceed to the video recording phase.
- The system displays instructions for video recording. Review these instructions carefully. Steps include granting camera access, positioning your face in front of the camera, and recording your answers to prompted questions.
- Record the video as per instructions, preview it if needed, and then submit once satisfied.
- After recording, the user can preview the video and either re-record or submit it if satisfied. This submission finalizes the video verification step.
- Once submitted, the system processes the video and displays a confirmation message. This means the video has been successfully uploaded.

5. Status Tracking and Confirmation Email



- After the video is uploaded, a status screen will confirm “eKYC Video Submitted Successfully”.
- You’ll also receive an email notification confirming successful video submission and eKYC completion (pending CA review).

6. eKYC Status Update and Forwarding

- The system dashboard indicates completion of Aadhaar and video-based eKYC with the status progressing to “eKYC Completed”.
- Your application is now automatically forwarded to the Certificate Authority (CA) for Level 1 and Level 2 approvals and agreement processes.

Once Aadhaar and video verification are successfully completed, the system displays a success message and the eKYC status is marked as complete.

The request is now forwarded to the CA portal for approval at Level 1 and Level 2.

4. Individual Login after eKYC approval from CA

4.1. Subscriber Agreement

After eKYC approval from CA Level 1 & Level 2, the subscriber must log in to the portal again. The portal will prompt the subscriber to accept the Subscriber Agreement. This agreement outlines the legal terms associated with digital certificate usage. The subscriber should review the terms and click 'Agree & Sign' to proceed.

If the subscriber clicks 'Reject', all certificates for the user will be rejected and the enrollment process is terminated. The user must start a new registration if they wish to proceed further.

Once the agreement is signed, the system confirms the action with a success message. This enables the next step, which involves completing and signing the DSC Application Form.

4.2. DSC Application Form

The DSC Application Form is displayed to the subscriber after agreement acceptance. It contains fields such as applicant name, address, identity number, and other required details. Most of the information is auto-filled using eKYC data; however, the subscriber must validate and confirm all fields. After reviewing the form, the subscriber is required to digitally sign it to complete the submission. This step is applicable only when a DSC is purchased. If the eSign plan is purchased and the subscriber signs successfully, they will be redirected directly to the dashboard page.

- If the user clicks 'Reject', this DSC application will be rejected and if required, the user can purchase a new DSC from the "My Subscription" section
- Upon agreeing and signing the DSC form, the application is formally submitted for certificate generation. The system confirms the submission and enables dashboard access to manage certificates.
- The subscriber can now access the Dashboard, where they will see options such as Manage Certificates, My Subscription, Upload & Sign, and eSign Transactions.

4.3. Manage Certificate

Under the **'Manage Certificate'** tab, the subscriber can see a list of certificate applications. Each application displays status, request date, and relevant actions such as Setup or Download.

Clicking the **'Download'** button and click on proceed checkbox for a certificate application prompts the subscriber to enter Application ID and Download PIN. These are usually shared via email after certificate issuance is complete.



On the certificate download screen, the subscriber is required to confirm application details such as Application ID and Download PIN which must have been received through mail. This page also initiates mobile OTP verification to ensure security.

- The subscriber clicks 'Get OTP' to receive a one-time password on their registered mobile number. This OTP is used to verify the user's identity before downloading the digital certificate.
- The subscriber enters the received OTP in the designated field and clicks 'Verify OTP'. Successful verification grants access to the final download screen.
- The subscriber must select the type of cryptographic token and enter the token password. This step ensures the certificate is downloaded securely into token.
- Once the above steps are complete, the certificate is downloaded and installed in the token. A success message confirms that the certificate is ready for use.

4.4. Different type of Certificate Setup and Download flow

4.4.1. Signature class 3 individual

Purchase Digital Certificate Workflow

- **Step 1: Select the Certificate Plan**
Begin the process by selecting your desired DSC plan.
You will see available options such as "Signature - Class 3"
Review the plan details including validity, cost, and GST breakdown, then click "Next" to continue.
- **Step 2: Choose Payment Option**
You are taken to a payment selection page.
Choose your payment option (for example, "SBlePay"), then click "Continue" to proceed.
- **Step 3: Enter Payment Details**
Fill out payment information such as card details or choose net banking/branch payment as per your preference. Check your order summary, enter all details correctly, and proceed with "Pay Now."
- **Step 4: Transaction Success Confirmation**
A confirmation screen is displayed with a green tick, showing your transaction ID, amount paid, and payment mode.
Click the provided link to manage your certificate or continue with the next steps in the issuance process.

NOTE: If the eKYC is approved within 48 hours, there is no need to record the video again — it will be automatically pre-fetched. However, if the subscriber purchases a DSC after 48 hours of eKYC approval, they will be required to record the video again.

Record Video for IPV (In-Person Verification)

- After successful PAN verification, proceed to the video recording phase.
- The system displays instructions for video recording. Review these instructions carefully. Steps include granting camera access, positioning your face in front of the camera, and recording your answers to prompted questions.
- Record the video as per instructions, preview it if needed, and then submit once satisfied.
- After recording, the user can preview the video and either re-record or submit it if satisfied. This submission finalizes the video verification step.
- Once submitted, the system processes the video and displays a confirmation message. This means the video has been successfully uploaded. They can click on "Submit for verification" Once the setup is completed, it will GO to CA portal for approval. After CA approval subscriber will receive email after which they have to perform eSign and they can download the certificate



Click on download button

Enter Application ID and Download PIN which they must have received in email.

This page also initiates mobile OTP verification to ensure security. After successful verification the subscriber will get access to the final download screen.

The subscriber must select the type of cryptographic token and enter the token password. This step ensures the certificate is downloaded securely into the physical or software token device.

Once the above steps are complete, the certificate is downloaded and installed in the token.

A success message confirms that the certificate is ready for use.

4.4.2. System class 3 individual

Purchase Digital Certificate Workflow

Step 1: Select the Certificate Plan

"System - Class 3". Review the plan details including validity, cost, and GST breakdown, then click "Next" to continue.

Step 2: Choose Payment Option then click "Continue" to proceed.

Step 3: Enter Payment Details and proceed with "Pay Now."

Step 4: Transaction Success Confirmation

- A confirmation screen is displayed with a green tick, showing your transaction ID, amount paid, and payment mode.
- Click the provided link to manage your certificate or continue with the next steps in the issuance process.

In this step, upload the Certificate Signing Request (CSR) file by clicking "Choose File." About CSR: As per IOG (Interoperability Guidelines), a CSR file must be generated by the subscriber. The CSR securely binds identity information and public key for the certificate. Use OpenSSL or your enterprise tool to create this file before uploading. After uploading, click "Validate CSR" to confirm its correctness.

After CSR is validated, they must upload a pdf copy of supporting documents and click on upload button.

- After successful document upload and video verification (if required), the subscriber clicks on "Submit for Verification".

. Record Video for IPV (In-Person Verification)

- After successful PAN verification, proceed to the video recording phase.
- The system displays instructions for video recording. Review these instructions carefully. Steps include granting camera access, positioning your face in front of the camera, and recording your answers to prompted questions.
- Record the video as per instructions, preview it if needed, and then submit once satisfied.

After recording, the user can preview the video and either re-record or submit it if satisfied. This submission finalizes the video verification step.

Once submitted, the system processes the video and displays a confirmation message. This means the video has been successfully uploaded.

NOTE: If the eKYC is approved within 48 hours, there is no need to record the video again — it will be automatically pre-fetched. However, if the subscriber purchases a DSC after 48 hours of eKYC approval, they will be required to record the video again.

They must click on "Submit for verification, after which the setup will be completed and a pop-up message will be shown as below:

Once the setup is completed, it will land into CA portal for approval. Once CA approves then subscribers will receive email, they must perform eSign and they can download the certificate



You'll be able to download the issued certificate in .cer format from the provided download link.

4.4.3. Encryption class 3 individual

Purchase Digital Certificate Workflow

Step 1: Select the Certificate Plan

Begin the process by selecting your desired DSC plan.

You will see available options such as "Encryption - Class 3"

Review the plan details including validity, cost, and GST breakdown, then click "Next" to continue.

Step 2: Choose Payment Option

You are taken to a payment selection page.

Choose your payment option (for example, "SBlePay"), then click "Continue" to proceed.

Step 3: Enter Payment Details

Fill out payment information such as card details or choose net banking/branch payment as per your preference.

Check your order summary, enter all details correctly, and proceed with "Pay Now."

Step 4: Transaction Success Confirmation

A confirmation screen is displayed with a green tick, showing your transaction ID, amount paid, and payment mode.

Click the provided link to manage your certificate or continue with the next steps in the issuance process.

In this step, they must upload PDF copy of supporting documents and click on upload button

Record Video for IPV (In-Person Verification)

- After successful PAN verification, proceed to the video recording phase.
- The system displays instructions for video recording. Review these instructions carefully. Steps include granting camera access, positioning your face in front of the camera, and recording your answers to prompted questions.
- Record the video as per instructions, preview it if needed, and then submit once satisfied.

After recording, the user can preview the video and either re-record or submit it if satisfied. This submission finalizes the video verification step.

Once submitted, the system processes the video and displays a confirmation message. This means the video has been successfully uploaded.

NOTE: If the eKYC is approved within 48 hours, there is no need to record the video again — it will be automatically pre-fetched. However, if the subscriber purchases a DSC after 48 hours of eKYC approval, they will be required to record the video again. They must click on "Submit for verification, after which the setup will be completed and a pop up message will be shown as below:

NOTE: If the eKYC is approved within 48 hours, there is no need to record the video again — it will be automatically pre-fetched. However, if the subscriber purchases a DSC after 48 hours of eKYC approval, they will be required to record the video again.

4.4.4. Individual (Encryption + Signature)- Class 3

Purchase Digital Certificate Workflow

Step 1: Select the Certificate Plan

Begin the process by selecting your desired DSC plan.



You will see available options such as "Individual(Encryption + Signature) - Class 3"
Review the plan details including validity, cost, and GST breakdown, then click "Next" to continue.

Step 2: Choose Payment Option

You are taken to a payment selection page.

Choose your payment option (for example, "SBlePay"), then click "Continue" to proceed.

Step 3: Enter Payment Details

Fill out payment information such as card details or choose net banking/branch payment as per your preference.

Check your order summary, enter all details correctly, and proceed with "Pay Now."

Step 5: Transaction Success Confirmation

A confirmation screen is displayed with a green tick, showing your transaction ID, amount paid, and payment mode.

Click the provided link to manage your certificate or continue with the next steps in the issuance process.

In this step, they must upload PDF copy of supporting documents and click on upload button

Record Video for IPV (In-Person Verification)

- After successful PAN verification, proceed to the video recording phase.
- The system displays instructions for video recording. Review these instructions carefully. Steps include granting camera access, positioning your face in front of the camera, and recording your answers to prompted questions.
- Record the video as per instructions, preview it if needed, and then submit once satisfied.

After recording, the user can preview the video and either re-record or submit it if satisfied. This submission finalizes the video verification step.

Once submitted, the system processes the video and displays a confirmation message. This means the video has been successfully uploaded.

NOTE: If the eKYC is approved within 48 hours, there is no need to record the video again — it will be automatically pre-fetched. However, if the subscriber purchases a DSC after 48 hours of eKYC approval, they will be required to record the video again.

NOTE 1): Two application ID's will be appearing in the left side as this is a combination of two certificates (Encryption & Signature)

NOTE 2): If the eKYC is approved within 48 hours, there is no need to record the video again — it will be automatically pre-fetched. However, if the subscriber purchases a DSC after 48 hours of eKYC approval, they will be required to record the video again.

They must upload supporting PDF documents and click on upload. After which they can proceed to record the video. Once recorded, they can submit the request for verification, by clicking on "submit for verification".

- Once the setup is completed, they will get a pop-up message as below:
- After is setup is completed, it will land into CA portal for approval. Till the time it's not approved, it will be in pending status.
- Once it is approved by both CA's, subscriber can perform eSign
- They must click on agree and sign
- Once it has been signed, subscriber can download the certificate, by clicking on download button



- After clicking on download button, they will be getting the below page
- They must enter details (Appilication ID and Download PIN) which they must have received in email and they can click on proceed button.
- After clicking on proceed button , they have to enter Certificate Password, Mobile number. Subscriber has to click on get OTP and have to verify the OTP.
- After entering the details, they can click on agree and download.
- Subscribers must insert token and have to select token type. They need to enter token password, after which they can click on agree and download.

4.5. Revoke Certificate

Revocation ensures that a DSC is no longer considered valid or trustworthy. This is crucial for maintaining the security and integrity of digital transactions.

Common Reasons for Revoking a DSC

1. Compromise of private key – If the private key (used to sign documents) is lost, stolen, or suspected to be compromised.
2. Change in user details – If the holder's information (like name, organization, or email) changes.
3. Misuse of the certificate – If it's found that the DSC is being used for unauthorized or fraudulent activities.
4. Employment or contractual changes – When the certificate holder leaves an organization or their authorization ends.
5. Technical or administrative reasons – Such as issuing errors or compliance issues found after issuance.

Once the certificate got downloaded, they can click on view button. Under which they will be getting revoke certification option.

Click on proceed, to revoke the certificate. Subscriber has to enter revocation reason from the list.

If unspecified has been selected, they will have to enter the remarks and then click on submit.

Once submitted successfully, they will be getting the below screen under manage certificate "view option where they can see the status as "Revoke certificate request initiated".

After this step, the request will land into CA Portal for approval.

Once CA will approve the request, the status of certificate will be changed to revoked.

4.6. Suspend Certificate

Once the certificate got downloaded, they can click on view button. Under which they will be getting suspend certification option. If the certification needs to be suspended for a particular time period, the subscriber can go for suspend certificate option.

Click on Proceed to suspend the certificate. Enter the suspend reason.

After this step, the request will land into CA Portal for approval.

Once CA will approve the request, the status of certificate will be changed to suspend.

4.7. Activation Certificate

Suspended certificate can only raise a activation request

Click on view button, to initiate activation request for the certificate. Click on activation in the below screen.

Enter the activation reason and click on submit.

Once submitted, they can see the status under manage certificate section. Click on view button

Once the CA is approved, the certificate will be activated

4.8. Reissue Certificate



After downloading the certificate, if the subscriber faces any issue with the certificate, then they can reissue the certificate.

Click on view button

Once clicked in proceed, New application ID will be generated. After this, the new application will land into CA portal for approval.

Click on submit for verification

Once approval is done, they must esign and download the certificate. After downloading the certificate, the old application will automatically revoke and the new one can be used.

4.9. My Subscription

To purchase an eSign or DSC plan, the subscriber must navigate to 'My Subscription' and select the 'Purchase eSign' or DSC option. A list of available eSign or DSC plans will be shown. The subscriber should choose a suitable plan based on validity and usage count.

My Subscription eSign & DSC Plan: This section under 'My Subscription' displays the current status of eSign or DSC Plan ,under eSign plan usage including remaining credits and validity period. DSC Plan section displays all purchased DSC plans, their validity, and issuance status. It helps users manage their subscriptions efficiently.

My Subscription eSign:

My Subscription DSC Plan:

4.10. Purchase eSign

After selecting the eSign plan, the subscriber proceeds with the payment using available gateways. Once the payment is successful, a confirmation message is displayed

4.11. Upload & eSign

To initiate document signing, the subscriber navigates to the 'Upload & Sign' section from the dashboard. On this page, the subscriber uploads the PDF document they wish to sign digitally. If the eKYC Pending , and they are trying to navigate Upload and Sign option. The below pop up will appear. They have to complete eKYC Process.

If the subscriber did not purchase the any eSign plan and trying to navigate to upload & Sign, the below pop up will appear. They can purchase the eSign plan from My Subscription.

Once the document is uploaded, it appears in a preview section. The subscriber can review the document before proceeding to sign it electronically.

Clicking the 'Proceed' button takes the subscriber to the signature placement screen where additional details are required for completing the eSign process.

The subscriber must enter specific information such as Place/Location, Pages and Reason for signing. The signature settings can also be configured here, such as placement coordinates. Clicking 'Save & Proceed' saves the signature settings. Users will be redirected to eSign gateway page and they wil must authenticate.

They must enter Aadhar number, OTP will be sent to the registered mobile number. The subscriber must enter this OTP to confirm and authorize the eSign transaction.

After successful OTP verification, the document is digitally signed, and a success message is displayed. The subscriber can download the signed PDF immediately from this screen.

After clicking on download button, it will be downloaded as a zip file in downloads section.

After extracting the zip folder, they can open the signed document PDF file as below



4.12. eSign Transactions

The 'eSign Transactions' page shows a history of all eSign operations. Each entry includes transaction ID, date, document name, and status. Subscribers can also download signed documents from this page.

4.13. Purchase DSC

Purchase and Activate DSC – Step-by-Step

- Select and Purchase DSC Plan
 - The subscriber navigates to the "Purchase DSC" section and chooses the desired certificate plan (e.g., Signature - Class 3, 2 Year).
 - After clicking "Continue," the subscriber selects a payment method and completes the transaction using the available gateway (credit card, net banking, etc.).
 - On successful payment, a confirmation message is displayed, and the certificate will appear in the user's "Manage Certificate" section with status as "Pending".

4.14. DSC Setup and Document Upload

- The subscriber must now set up the certificate by clicking "Setup" next to the purchased plan in "Manage Certificate."
- All personal and certificate details are fetched automatically from eKYC and the purchase record. The subscriber reviews and confirms the details.
- They then proceed to upload required supporting documentation, (PDF only), by selecting and uploading the document file.
- If eKYC approval was granted within 48 hours previously, video verification may be auto fetched; otherwise, click "Record Video" to add new verification footage as required by compliance.
Once video is uploaded, submit for verification.

4.15. Submit for Verification

- After successful document upload and video verification (if required), the subscriber clicks on "Submit for Verification." A confirmation will be shown that setup is completed successfully. After setup, they will be receiving a mail confirmation.

4.16. CA Approval

4.17. DSC eSign and Certificate Download

- After CA approval, the subscriber logs in and completes the final eSign for the DSC as per instructions.
- Once eSign is complete, the digital certificate is available for download from the "Manage Certificate" section.

