DIR-3 KYC - Add Reminders, Assign Team Member

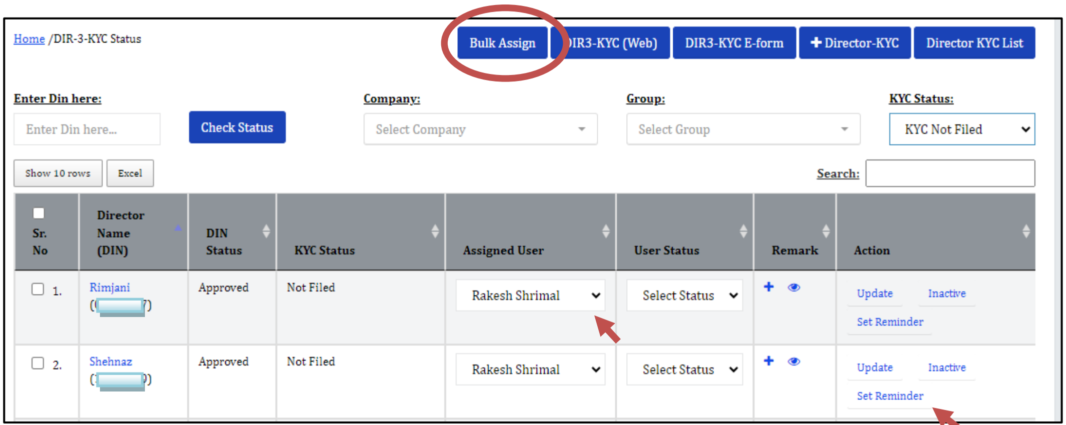
Dear users,

We have introduced a convenient feature for setting reminders for DIR-3 KYC, allowing you to assign team members to handle the compliance process.
This makes it easier to distribute the workload, ensuring that your team can efficiently complete KYC tasks with ease and coordination.

Steps to be followed:

Dashboard -> Secretarial Practice Management -> DIR-3 KYC

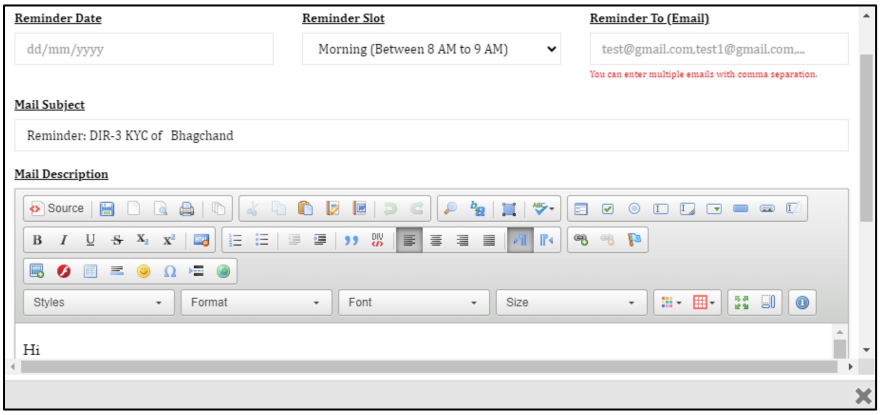
Here you can assign the team members specific KYCs either in bulk or one by one. For bulk you have to click on the bulk assign button as shown below:



Here the team mate can also select the status, whether the KYC is pending at client or at our end.

Here you can set reminders for the KYCs.

Set Reminder



Here you have to add the date, email on which you want to receive the reminder.

Please reach out to us if you need any assistance:

+91 99298 22200, Call & WhatsApp both available, complyrelax@gmail.com.