



Installation of KYC Portal

Installation is simple and straight forward process as far as KYC Portal is concerned. Just follow the below steps

1. Extract **KYC_Portal.zip** file and copy **kyc.zip** to your root folder of your domain or subdomain
2. Create a MySQL Database and provide full access to DB username
3. Extract **kyc.zip** file and upon completion just edit **conn.php** file and provide your DB Server, DB Name, DB Username and DB Password and change the URL accordingly
4. Edit **class.phpmailer.php** file for sending mail, proper instruction provided in the file itself as a comment follow the same and configure your smtp server and port perfectly
5. Just import **kyc.sql** file to your database and that's it.
6. Logon as admin@gmail.com please reset the password in the database

That's it you are all set to use KYC portal for your business,

How to use KYC Portal?

Follow the instruction below to use your KYC Portal effectively, for our example we assume that you are going to use this portal for your UAE clients

1. Logon as an admin with provided account, change admin related email, passwords according to your needs using **"Update info"** menu
2. Click on **"KYC Form"** and click on Add New to prepare your form for UAE in this example
3. Select your country, provide your emirate (for example: Dubai, Abu Dhabi etc.,)
4. Provide Document name you wish to collect from this client, if you want some more documents to be collected just select **"Add New document type"** and provide details in the textbox
5. If you want to add Radio button with your option, just click on **"Add New Radio Button"**
6. Similarly, if you want to add a checkbox or a text box for your client just provide details accordingly by adding **"Add New Checkbox"** and **"Add New Text Field"**

7. Save Changes and provide your URL like to your UAE Clients
8. They will create their user account according to their region and they will update the required documents you requested in the form and that's it.
9. You can use the same tool for all your clients, vendors, suppliers and employees as well.

If you like to the tool please give me **5 Star** rating to motive and to provide various tools like this, Many Thanks in advance

If in case of any issues please feel free to reach us via the support link, Thanks again.