Q1. What is the SIP Business Chart in Wealth Elite?

The SIP Business Chart is a bar graph displayed on the dashboard. It allows MFDS (Mutual Fund Distributors) to view running, started, and closed SIP data for the last four months. By hovering the cursor over each month, the data can be viewed in detail.

Q2. Where is the Transaction Bar in Wealth Elite?

The Transaction Bar is located on the home dashboard. It shows recent transactions such as:

Purchases

Redemptions

SIP transactions

SIP rejections

Other rejected transactions

Users can view this data for the last 3, 7, 10, or 30 days.

Q3. What is the Enable 2FA Module?

The Enable 2FA Module works like an app lock. It allows you to set a password on specific modules within the software for enhanced security.

Q4. How to Check Auto Upload Status?

You can check the auto upload status by viewing the Mailback File Status section at the bottom of the dashboard:

Green – Auto upload is working properly.

Yellow – Auto upload needs to be updated.

Red – Auto upload has not been working for many days.

1. How to Check Backdated Valuation

Option 1 – For a Specific Client:

- Path: **Mutual → Live MF Portfolio**
- Select **"As on Date"** for the desired backdate.
- View the valuation for that date.

Option 2 – For All Clients (Backdated AUM):

- Path: **Mutual → AUM Master → AUM by Client → AUM Report for Date**
- Select the required date to view backdated AUM for all clients.

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2. How to Do an SIP

(For registered clients)

1. Go to **Transact Online → MF → BSE / NSE / MFU → Transact Online / Transaction**.
2. Search **Client Name**.
3. Select **Mode of Holding**.
4. Choose **AMC Name → Scheme Type → Growth/Dividend Option → Scheme Name**.
5. Select **SIP**.
6. Choose **Mandate Type** and submit.
7. Go to **Cart** and place the transaction.

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3. How to Do a Lump Sum Transaction

(For registered clients)

1. Go to **Transact Online → MF → BSE / NSE / MFU → Transact Online / Transaction**.
2. Search **Client Name**.
3. Select **Mode of Holding**.
4. Choose **AMC Name → Scheme Type → Growth/Dividend Option → Scheme Name**.
5. Select **Lump Sum**.
6. Choose **Mandate Type** and submit.
7. Go to **Cart** and place the transaction.

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4. How to Map a Client from BSE

(For clients already registered on BSE)

- Path: **Transact Online → MF → BSE → Client Onboarding → Client Mapping**.
- Choose:
  - **Single Mapping** – Fill details and submit.
  - **Bulk Mapping** – Select bulk mapping option and upload client file, then submit.

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5. How to Set a Target-Based Alert

- Path: **Utilities → Target-Based Alert**.
- Search for the **Client Name**.
- Set alerts based on:
  - **NAV**
  - **Valuation**
  - **Date-based criteria**

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6. How to Set Alerts for Important Events

- Path: **Utilities → Scheduled Alert**.
- You can schedule alerts for:
  - **Investor Birthday**
  - **Anniversary**
  - **SIP Due Date**

    - **Valuation Alert**
- Alerts can be set for a **particular client** or **all clients**.