



User Manuals-Customer Registration

Registration, Login, Subscription, Add Business Renew
Subscription, Upgrade

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1. Customer Registration

To register on CreditQ, a user should have the following things handy.

- A Valid & Working Mobile Number
- Full Name
- Email Id

The complete Customer registration has been broken into following steps

- Registration
- Login
- Edit profile
- Purchase Subscription
- Add Business
- Sign Service Agreement

After completing the above-mentioned steps, the User would be able to use the complete functionality and all the services of the CreditQ Product.

1.1. Registration

Registration means the user is logging into the application for the first time. For users, the initiation point of Registration and Login are the same.

If the user is registered in to the CreditQ for the first time, he/she has to follow the below mentioned steps.

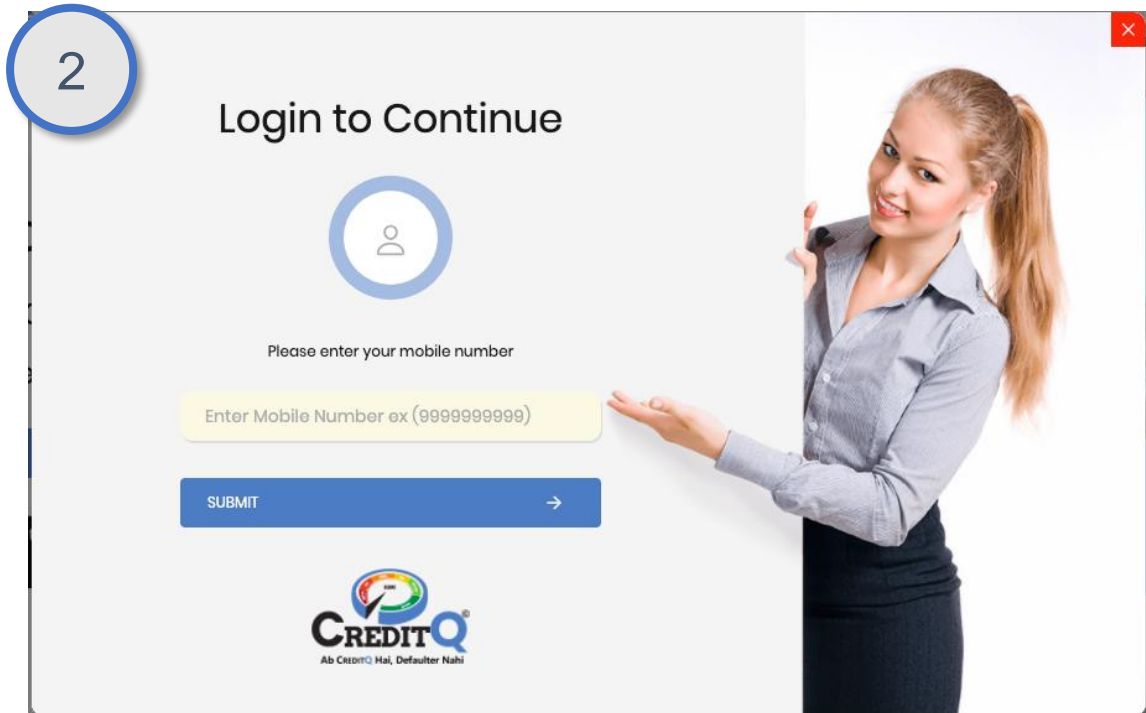
Step-1: Click on Login

The user has to click on the Login Button present on the CreditQ website. (<https://portal.creditq.in/login>)



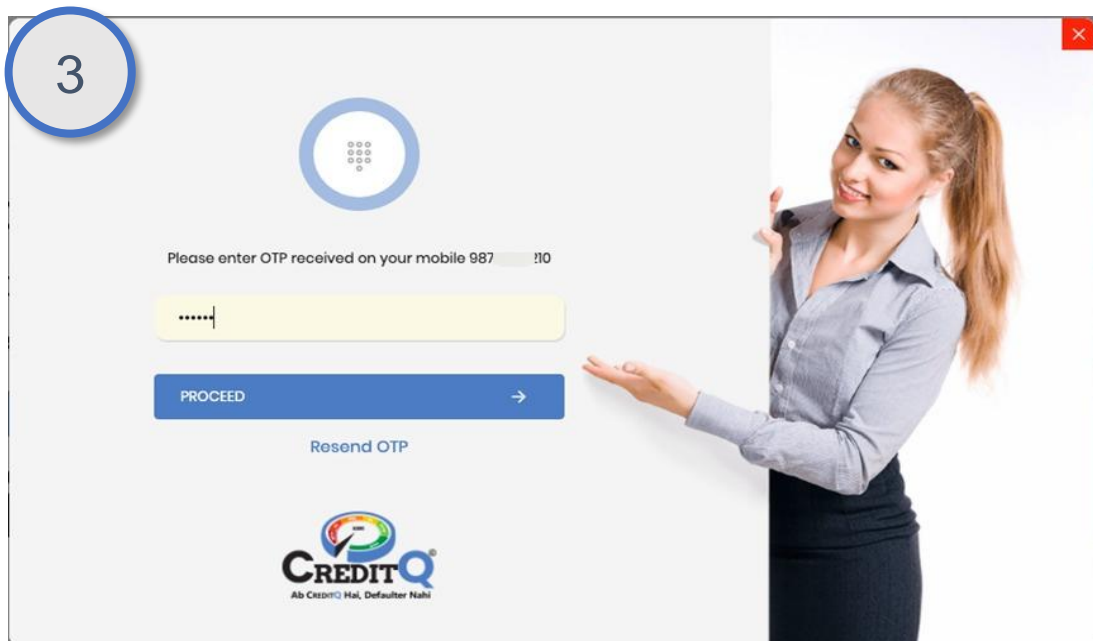
Step-2: Enter the Mobile Number

The user needs to enter the Mobile number using which he/she would like to register on the CreditQ Portal and click on SUBMIT. The same mobile number should be used further to Login into the application



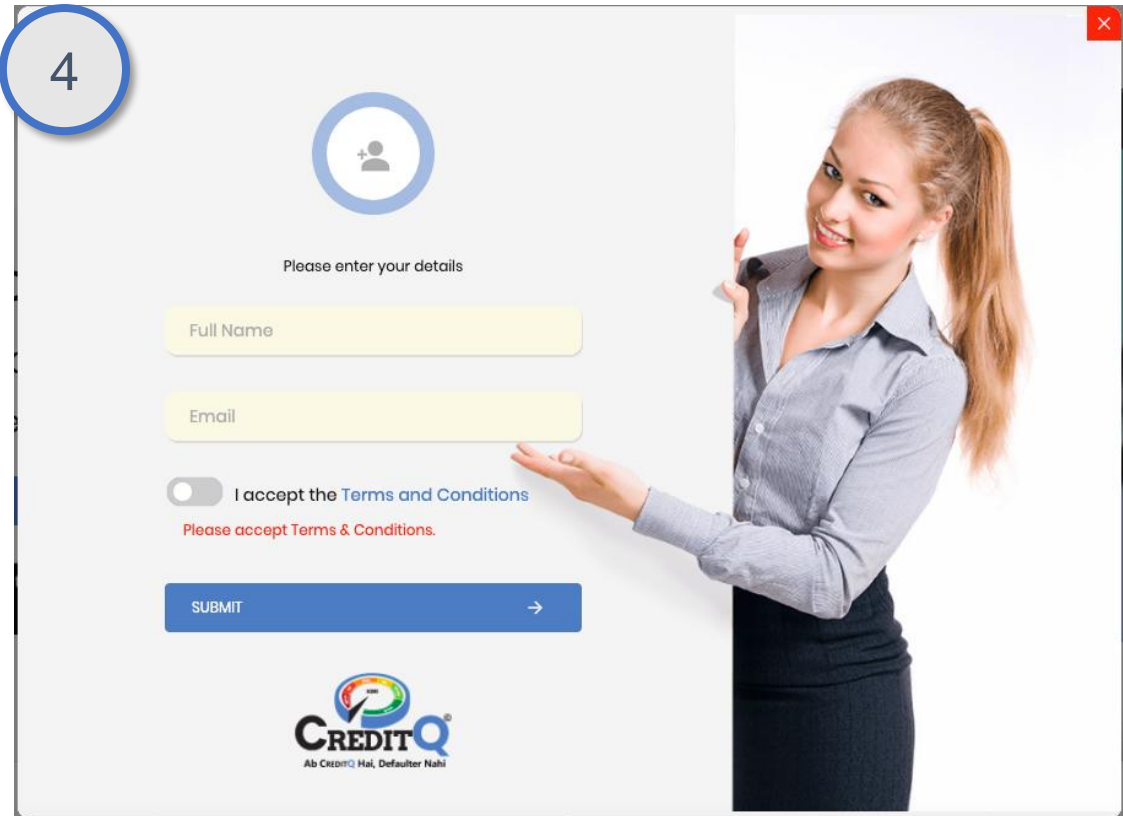
Step-3: Enter the OTP

An OTP is then sent to the mentioned Mobile Number. If not received, the user can click on RESEND OTP Link. If received successfully, the User should enter the OTP and click on SUBMIT Button.



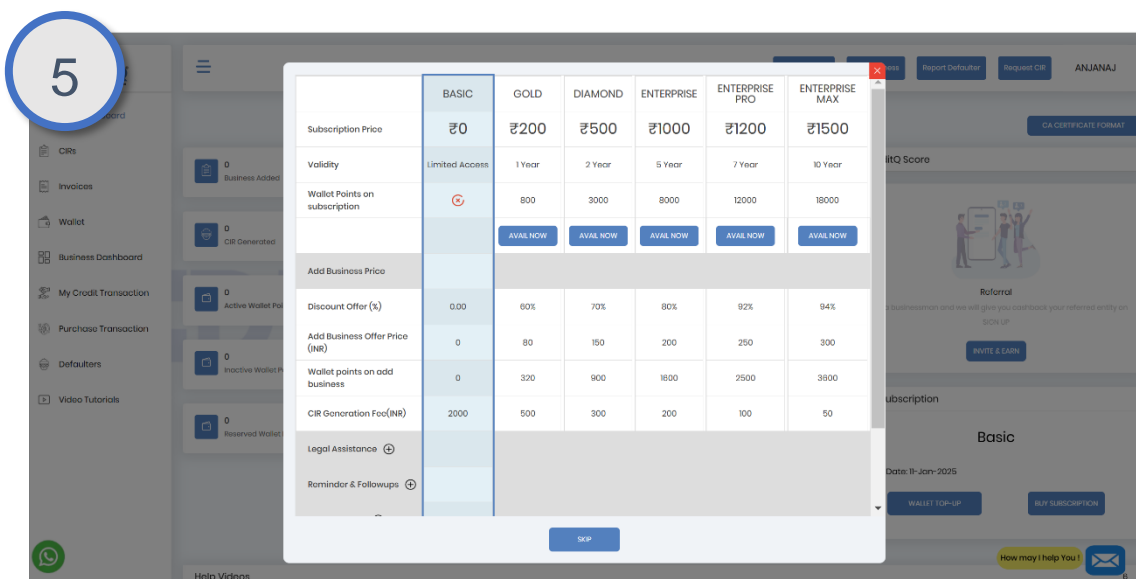
Step-4: Enter Details

The user needs to fill the Full Name, Email Id (Email id must be unique). The user should also “Accept the Terms & Conditions” and click on SUBMIT Button.



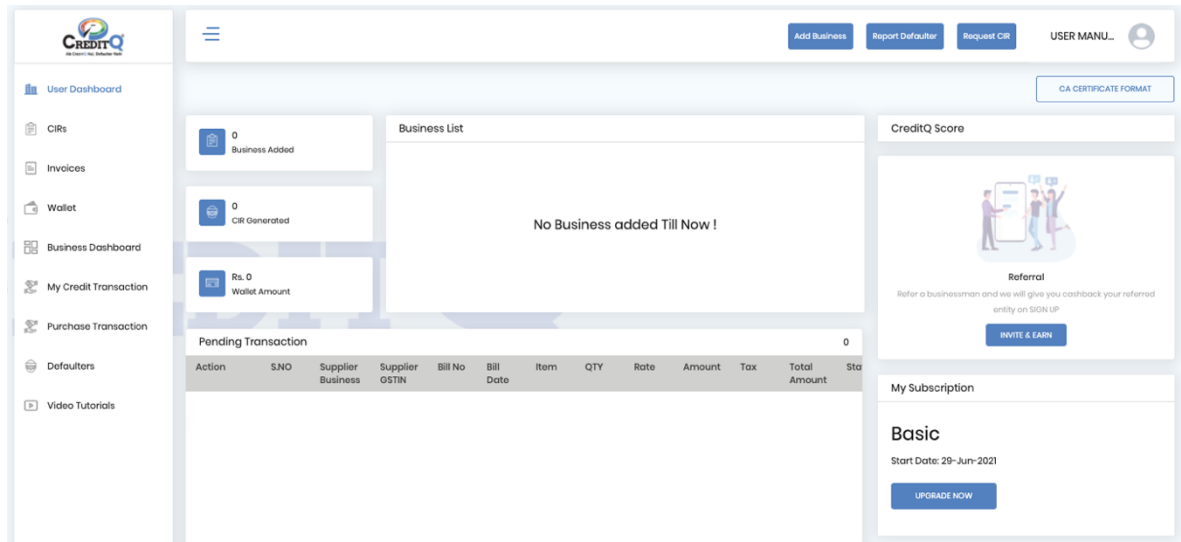
Step-5: Purchase Subscription

If the user has already made a decision that he would like to Purchase which subscription plan from the CreditQ Website then he can proceed and purchase the subscription. The user can also SKIP this step if he/she hasn't made the decision as yet



and purchase it later. The steps of Subscription Purchase are mentioned here. If the user SKIP the Subscription purchase, the **BASIC** subscription plan will be activated automatically. The user will land on the “User Dashboard” having the summary along with the Tutorial Videos.

User Dashboard



1.2. Log In

If the user has already Signed Up on the CreditQ, he/she has to follow the below mentioned steps.

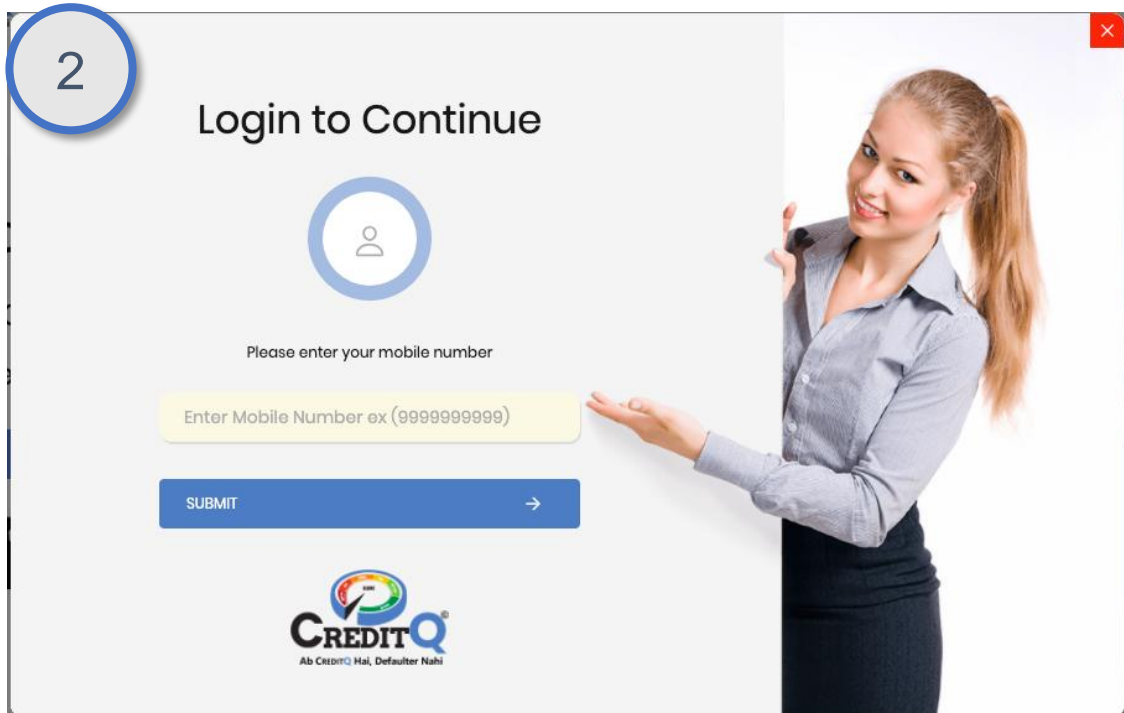
Step-1: Click on Login

The user has to click on the Login Button present on the CreditQ website. (<https://creditq.in/>)



Step-2: Enter the Mobile Number

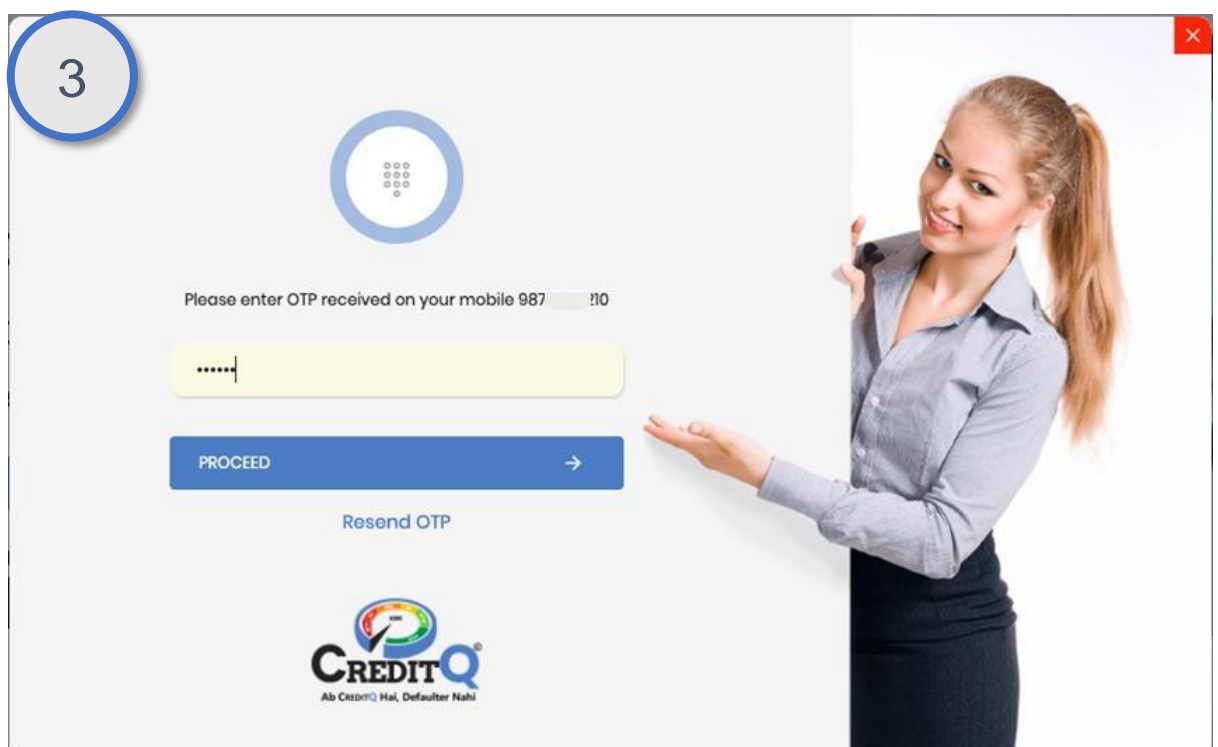
The user needs to enter the Mobile number using which he/she would like to register on the CreditQ Portal and click on SUBMIT.



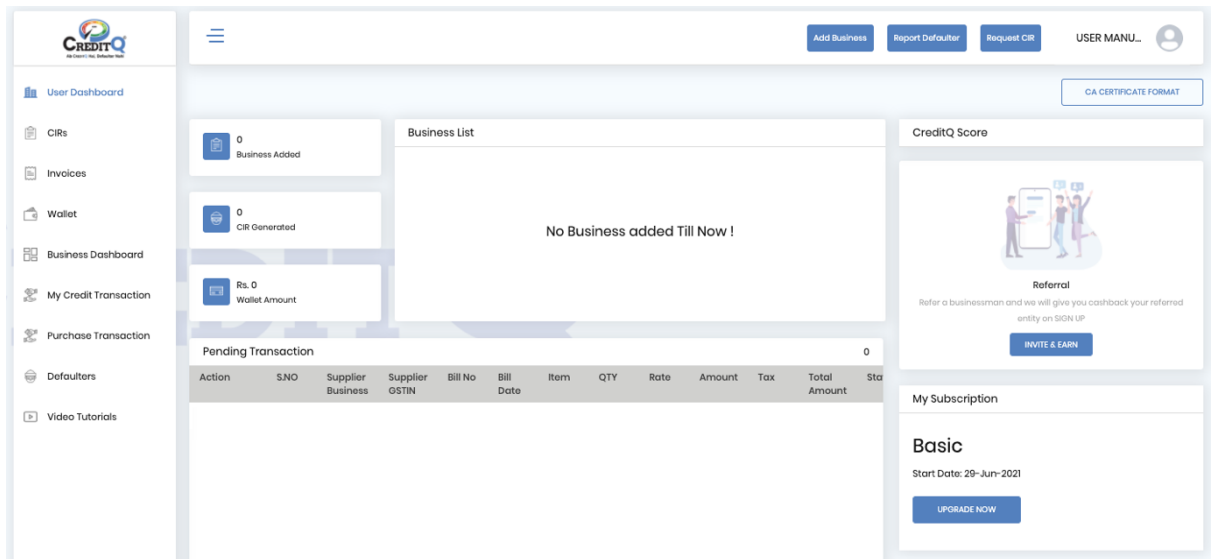
Step-3: Enter the OTP

An OTP is then sent to the mentioned Mobile Number. If not received, the user can click on RESEND OTP Link. If received successfully, the User should enter the OTP and click on SUBMIT Button.

As the user has already signed up, he/she would directly land on the "User Dashboard" having all the summary of all the Businesses and the transactions done till date (if subscription is already purchased).



User Dashboard



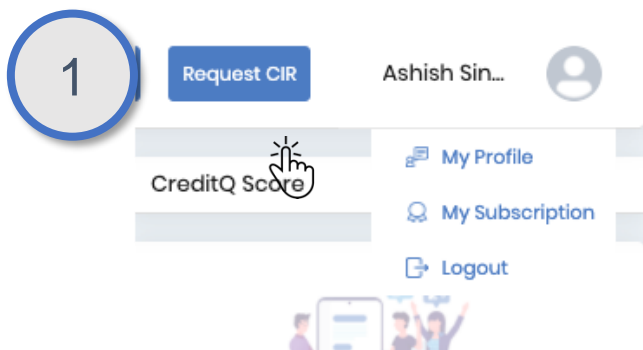
1.3. Update Profile

After Logging in, the user can update his/her profile anytime. In the Profile Section, the user would be able to update/add following details.

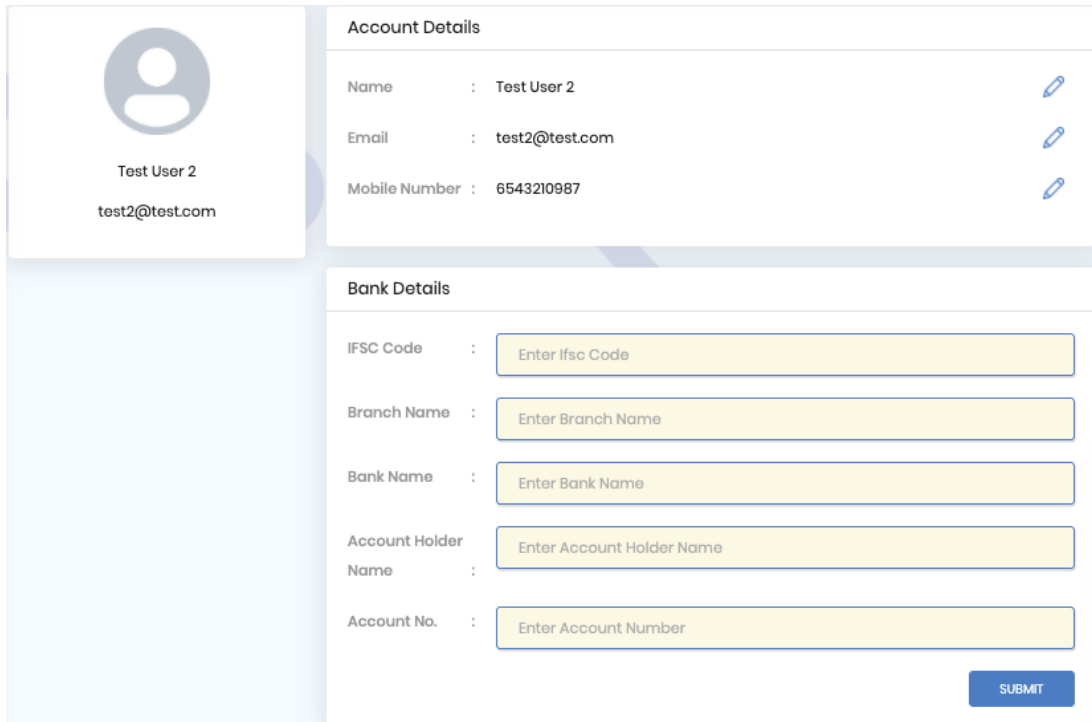
- Profile Picture
- Name
- Email Id (with OTP verification)
- Mobile Number (with OTP Verification)
- Bank Account (with OTP Verification)

Step-1: Click on My Profile

To go to the Profile Section, the user should click on the Profile Icon on the Action Bar and then click on "My Profile". The user would land on the My Profile Page.



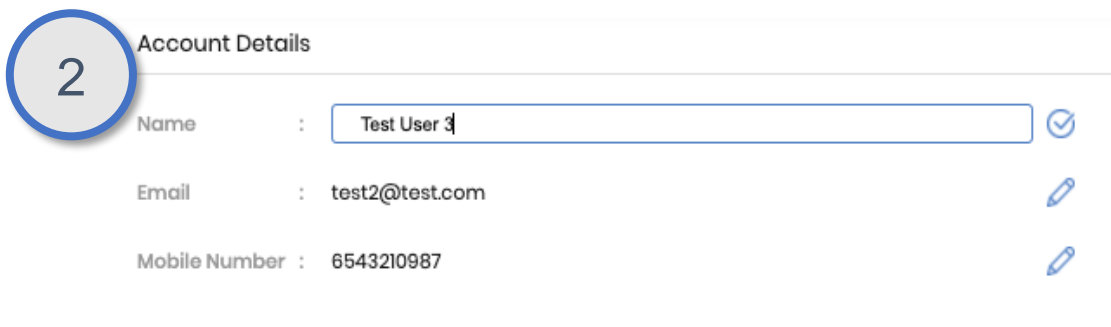
My Profile Page



The screenshot shows the 'My Profile Page' interface. On the left, there is a user profile card with a placeholder icon, the name 'Test User 2', and the email 'test2@test.com'. The main content area is divided into two sections: 'Account Details' and 'Bank Details'. The 'Account Details' section lists 'Name : Test User 2', 'Email : test2@test.com', and 'Mobile Number : 6543210987', each with a blue edit icon to its right. The 'Bank Details' section contains six input fields: 'IFSC Code', 'Branch Name', 'Bank Name', 'Account Holder Name', and 'Account No.', each with a placeholder text 'Enter [field name]'. A blue 'SUBMIT' button is located at the bottom right of the 'Bank Details' section.

Step-2: Click on Edit Icon

The user can edit Name, Email or Mobile number by just clicking the EDIT Icon beside the values. After entering the correct value, the user can click on the RIGHT icon to save the value. In case of Email & Mobile number change, the user needs to verify through OTP sent on the Mobile Number.



This screenshot illustrates Step 2 of the process. A large blue circle with the number '2' is overlaid on the 'Account Details' section. The 'Name' field is highlighted with a blue border and contains the text 'Test User 3'. A blue checkmark icon is visible to the right of the 'Name' field, indicating it has been successfully updated. The 'Email' and 'Mobile Number' fields remain unchanged from the previous screenshot.

Step-3: Add/Update Bank Details

For receiving the cashback, the user needs to update the bank account details. To start, the user needs to enter the IFSC Code and click on RIGHT button. Once the user

does that, the system will fetch the details of the Bank & Branch. The user should verify the same.

After that the user should enter the Account Holders Name and Account Number and click on SUBMIT Button. The user would receive the OTP on the registered Mobile Number which he needs to enter to save the details of Bank Account.

3

Bank Details

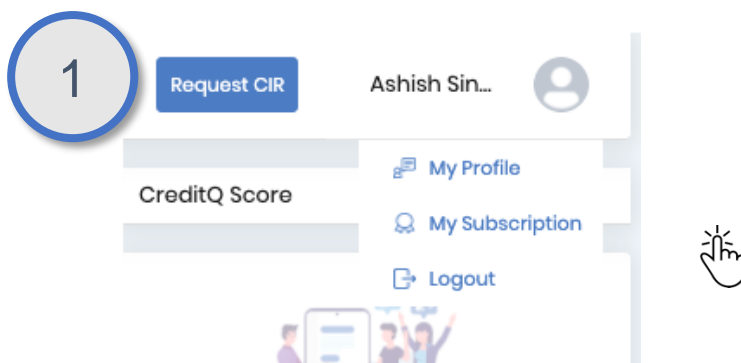
IFSC Code	:	<input type="text" value="AUBL0002214"/>	<input checked="" type="checkbox"/>
Branch Name	:	<input type="text" value="Enter Branch Name"/>	
Bank Name	:	<input type="text" value="Enter Bank Name"/>	
Account Holder Name	:	<input type="text" value="Enter Account Holder Name"/>	
Account No.	:	<input type="text" value="Enter Account Number"/>	

1.4. Purchase Subscription

To avail all services, the user should purchase a subscription plan as per his requirement. To do the same the user should follow the below mentioned steps.

Step-1: Click on My Subscription

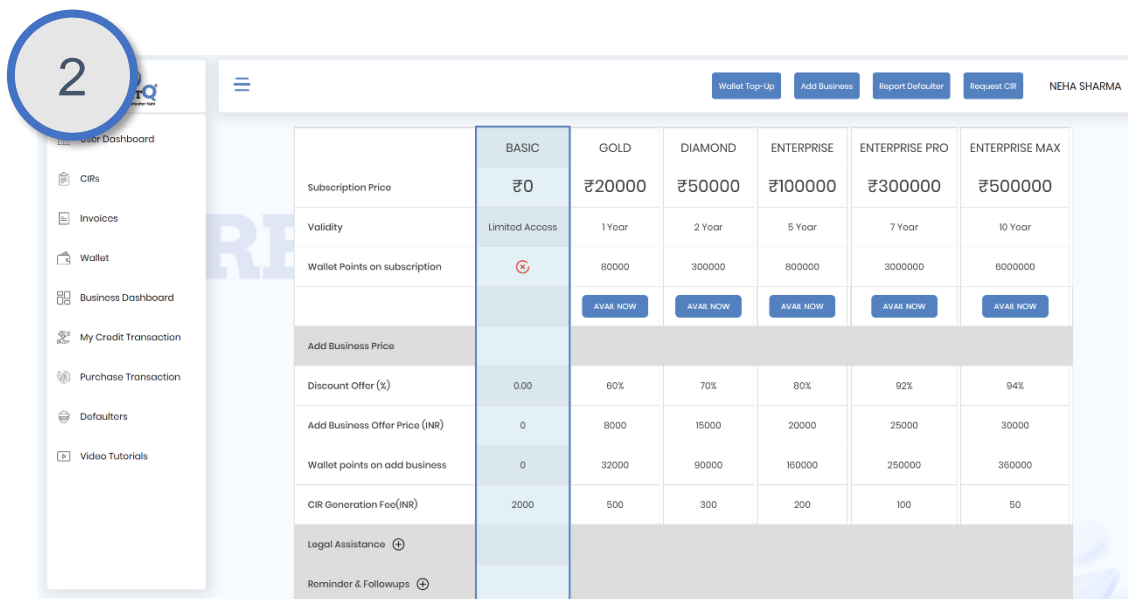
To go to the Profile Section, the user should click on the Profile Icon on the Action Bar and then click on “My Subscription”. The user would land on the My Subscription Page. The user can also do the same thing by clicking on UPGRADE NOW button on the Subscription Section of the User Dashboard.



Step-2: Click on Avail Now

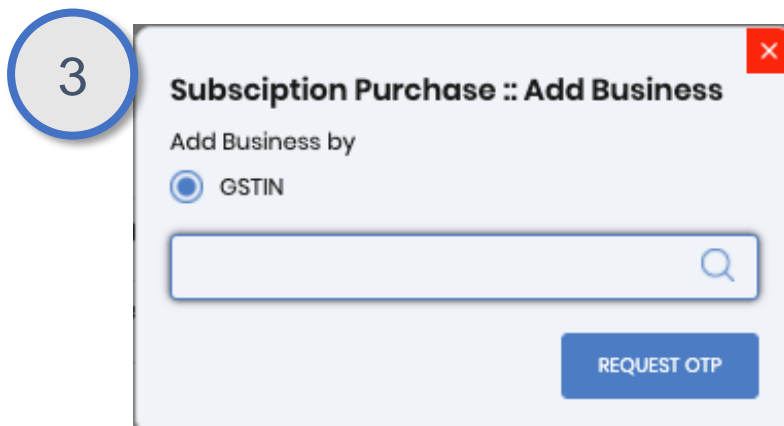
After landing on the My Subscription Page, the user should click on the AVAIL NOW button. If the user is purchasing Subscription for the first time and don't have a Business added to his account already, then the user will be asked to add a Business while purchasing Subscription.

If the user is renewing/upgrading plan and already have a business then the user will not have to add a business but can directly Renew/ upgrade the plan. In this case, the user doesn't have to follow the next couple of steps.



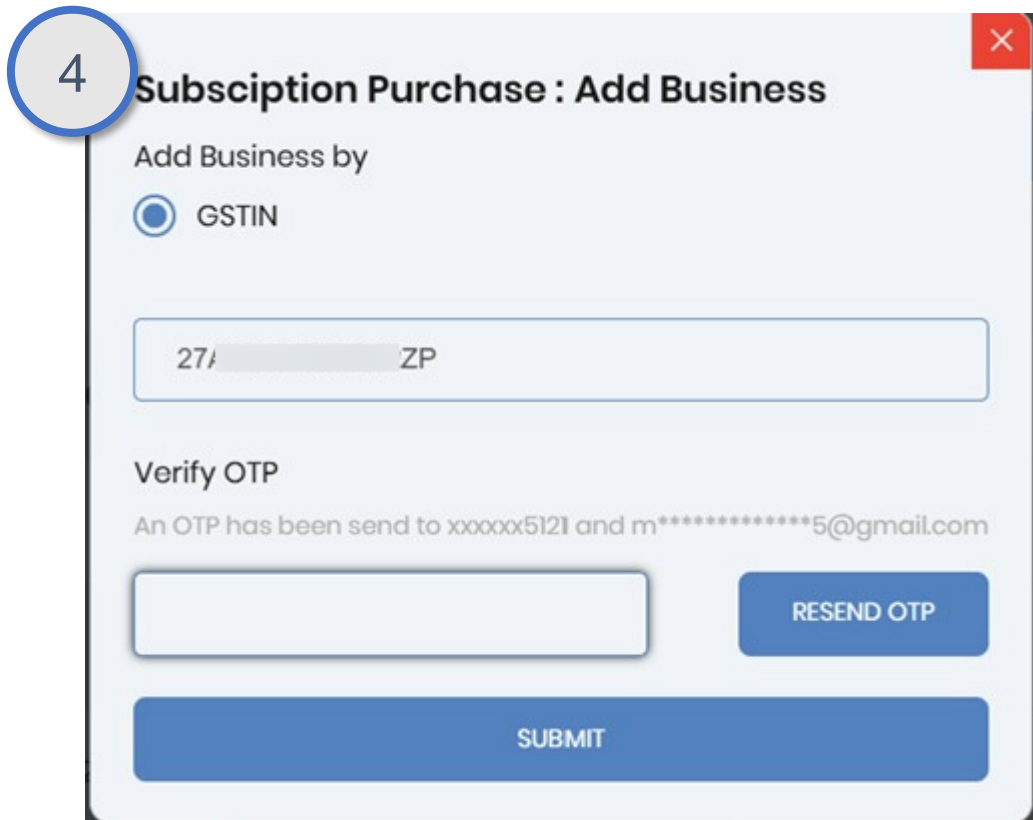
Step-3: Enter GST Number

To add a Business, the user has to provide the GST Number of the Business he wants to add and click on the Request OTP Button. The OTP would be sent to the Mobile Number using which the GST Number has been assigned to the Business. In case renew customer don't need to enter the gst he/she will select the business of renewal only, rest process in same.



Step-4: Enter the OTP

The user will receive the OTP on the GST registered Mobile Number and email id. If the OTP is not received then the user can click on the RESEND OTP button. If the OTP has been successfully received then the user would enter the OTP and click on the SUBMIT button. The system will fetch the details of the Business from GST Portal.



Step-5: Verify the Business Details

The user should verify all the details shown on the screen and confirm that this the business he wants to add in his account.

If the details are not correct or the system shows the error “Invalid GST” Or “Business already Exists”, please contact our customer support.

If the details shown are correct, please click on the NEXT Button.

5

GST Number

Legal Name

State Jurisdiction

Nature of business Activity

Trade Name

Address

State

Email Address

Mobile Number

Step-6: Provide other Details

The user should now provide the additional details to add this business to the account.

The user needs to provide the following details.

- Business Category
- City
- Secondary Email Address(Optional)
- Secondary Mobile Number (Optional)

The user should also click on the Check box “I have read and accept the Terms & Conditions”.

The user should click on the NEXT Button to Proceed.

If the Payment fails, the subscription won't be purchased and the business won't be added. However, if the payment is successful, the user will be redirected to the Customer Dashboard where he can verify the new plan and also see the Business he has added.

1.5. Add Business

If the user has multiple Businesses, he/she can add more businesses in his/her account.

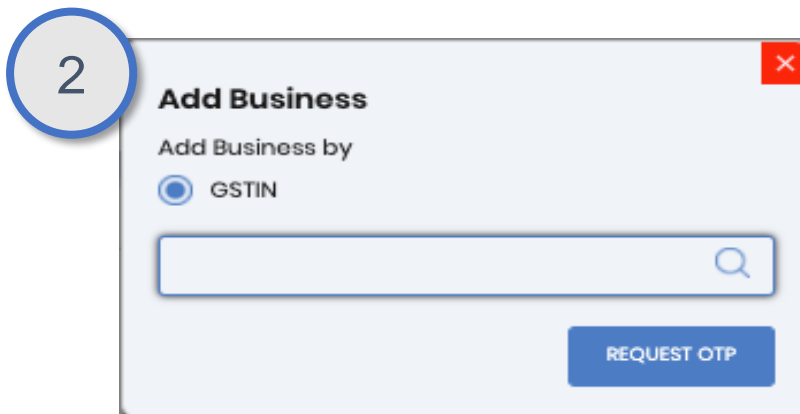
Step-1: Click on Add Business

To add business, the user should click on the ADD BUSINESS button on the action bar.



Step-2: Provide GST Number

To add a Business, the user has to provide the GST Number of the Business he wants to add and click on the Request OTP Button. The OTP would be sent to the Mobile Number using which the GST Number has been assigned to the Business.



Step-3: Enter the OTP

The user will receive the OTP on the GST registered Mobile Number. If the OTP is not received then the user can click on RESEND OTP button. If the OTP has been successfully received then the user would enter the OTP and click on SUBMIT button. The system will fetch the details of the Business from GST Portal.

3

✕

Subscription Purchase : Add Business

Add Business by

GSTIN

27/ ZP

Verify OTP

An OTP has been send to xxxxx5121 and m*****5@gmail.com

RESEND OTP

SUBMIT

Step-4: Verify the Business Details

The user should verify all the details shown on the screen and confirm that this the business he wants to add in his account.

4

GST Number

08DI)PIZ9

Legal Name

Shal ngo

State Justridiction

State - Jaipur,Ward - () (Jurisdictional Office)

Nature of business Activity

Retail Busin olesale Business

Trade Name

Sha ngo

Address

Flat no. Apartment Ghly , Jaipur, asthan, 30)18

State

State - Raj pur-I,Circle - Circle: - Circle-O, Jaipur, inal Office)

Email Address

arco, .com

Mobile Number

730 773

NEXT

If the details are not correct or the system shows the error “Invalid GST” Or “Business already Exists”, please contact our Customer support.

If the details shown are correct, please click on the NEXT Button.

Step-5: Provide other Details

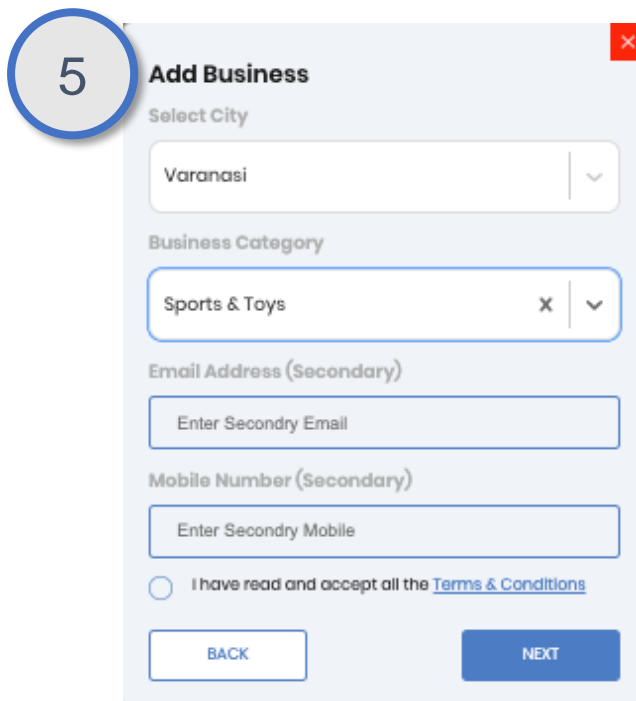
The user should now provide the additional details to add this business to the account.

The user needs to provide the following details.

- Business Category
- City
- Secondary Email Address(Optional)
- Secondary Mobile Number (Optional)

The user should also click on the Check box “I have read and accept the Terms & Conditions”.

The user should click on the NEXT Button to Proceed.

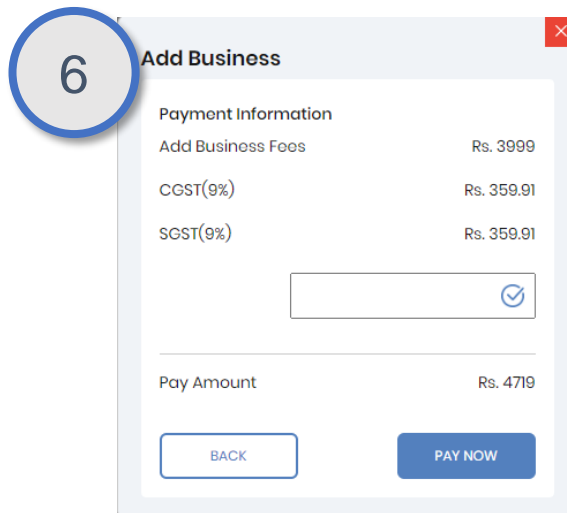


Step-6: Proceed for Payment

The system would ask the user to proceed to pay the amount as per the selected plan with all the details. The user can apply a promo-code (if available) to get the instant discount. To proceed the user should click on the PAY button.

The user would be redirected to the Payment gateway. He/she can make the payment by UPI, Internet Banking, Credit Card or Debit Card.

If the Payment fails, the subscription won't be purchased and the business won't be added. However, if the payment is successful, the user will be redirected to the Customer Dashboard where he can verify the new plan and also see the Business he has added.



Payment Information	
Add Business Fees	Rs. 3999
CGST(9%)	Rs. 359.91
SGST(9%)	Rs. 359.91

Pay Amount Rs. 4719

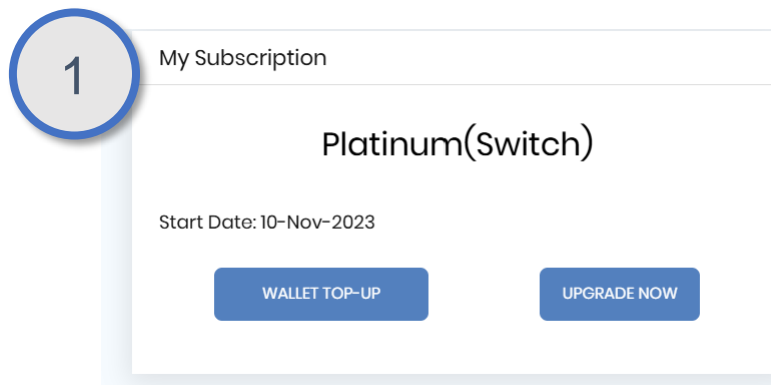
BACK PAY NOW

1.6. Upgrade the Subscription

If a customer has already subscribed to a plan and wants to upgrade it to avail more benefits according to the new plan, he/she can upgrade. Customers can upgrade their plan multiple times. Below is the process:

Step 1 : Click on the "Upgrade Now" button

From the dashboard (bottom of the page or right side of the page), the user will click on the "Upgrade Now" button



My Subscription

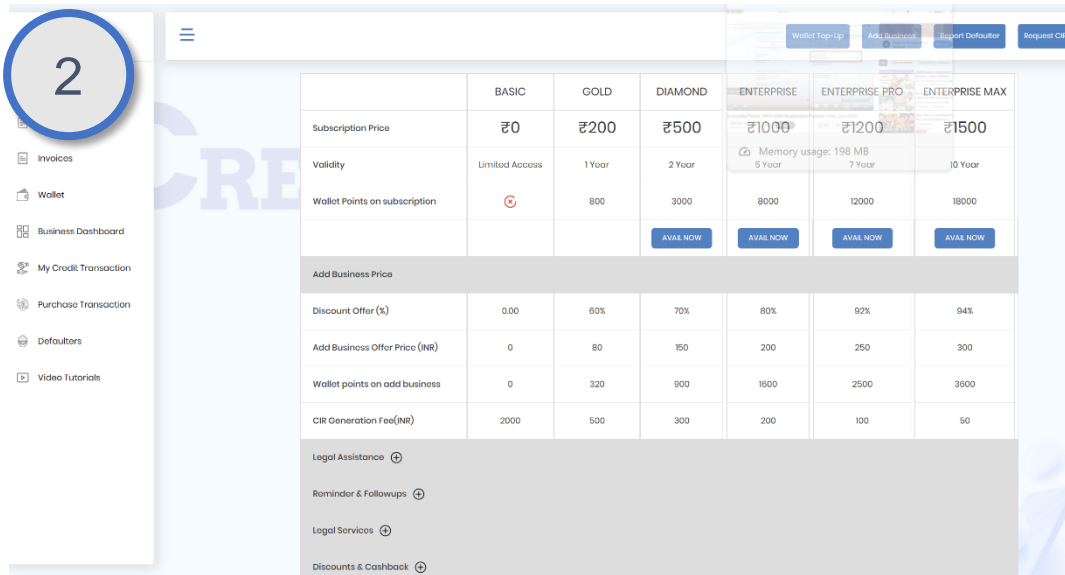
Platinum(Switch)

Start Date: 10-Nov-2023

WALLET TOP-UP UPGRADE NOW

Step 2: Select the plan to upgrade

The user will select the plan they want to upgrade to on click on Avail Now. From this page user will redirect directly on step 3.

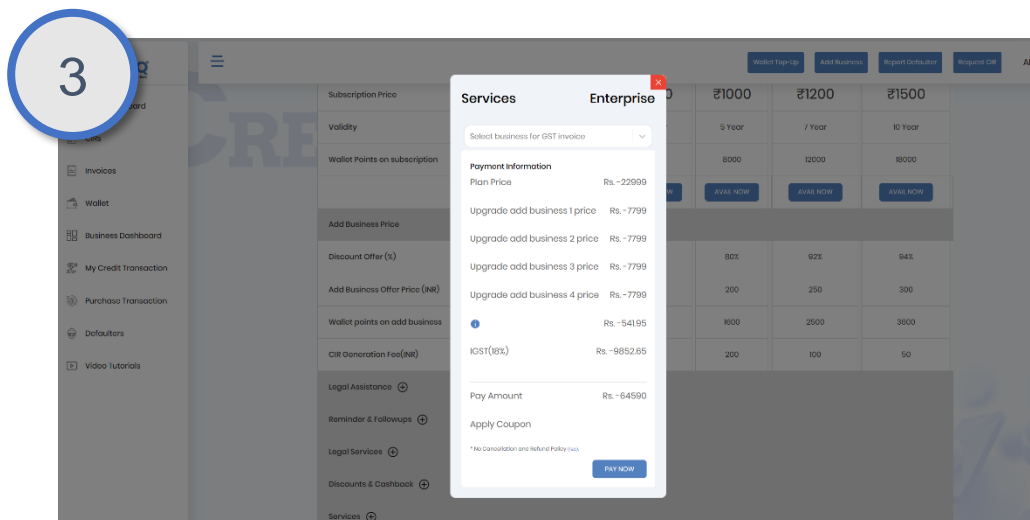


Step 3: Click on Pay Now

The system would ask the user to proceed to pay the amount as per the selected plan with all the details. The user can apply a promo-code (if available) to get the instant discount. To proceed the user should click on the “PAY NOW” button.

The user would be redirected to the Payment gateway. He/she can make the payment by UPI, Internet Banking, Credit Card or Debit Card.

If the Payment fails, the Plan won't be upgrade and the subscription will be on the plan. However, if the payment is successful, the user will be redirected to the Customer Dashboard where he can verify the new plan and also see the Business he has added.



2. Customer Support

We hope that you got the answers for all your queries. Still if you have any queries, please contact our Customer Support Team. PFB the details.



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