

Agent Institution

Agent Institution onboarding is done by OU side with the help canvas. Before onboarding Agent Institution following document and details are required.

- Agent Institution consent Form
- Front end Approval Mail
- Below details

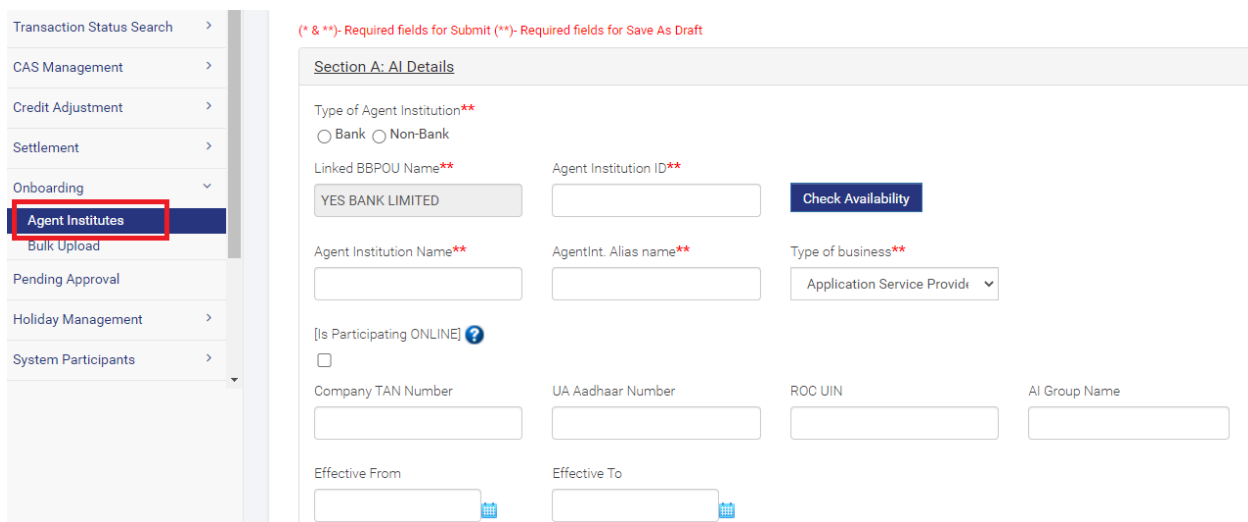
Details	output
Type of Agent Institution**	Bank/Non Bank
Agent Institution ID	
Agent Institution Name**	
AgentInt. Alias name**	
Type of business**	Select from Drop Down
Is Participating ONLINE	Need end point URL (If applicable)
Company TAN Number	
UA Aadhaar Number	
ROC UIN	
Effective From**	
Effective To	Advisable to keep Blank
Payment Channels*	Select Applicable Channel only from Drop down
Registered Address**	
State**	
City**	
Pin code**	
Country**	
Communication Address	It can be same as Registered address as well.
State**	
City**	
Pin code**	
Country**	
Contact Details	
1st Level	
First Name*	
Last Name*	
Designation	
Department	

Mobile No*	
Email ID*	
2nd Level	
First Name*	
Last Name*	
Designation	
Department	
Mobile No*	
Email ID*	
** fields are mandatory	

Once all above mention details and document are ready, then further processing can be started for AI id creation:-

- Login in canvas
- Select Onboarding
- Select Agent Institute

Below page will get open request you to fill the details into it.



(* & **)- Required fields for Submit (**)- Required fields for Save As Draft

Section A: AI Details

Type of Agent Institution**
 Bank Non-Bank

Linked BBPOU Name** Agent Institution ID**
 YES BANK LIMITED

Agent Institution Name** AgentInt. Alias name** Type of business**
 Application Service Provider

[Is Participating ONLINE] ?

Company TAN Number UA Aadhaar Number ROC UIN AI Group Name

Effective From Effective To


Agent Institution ID- Eg. If the last time you have used AI ID as 'TT02' Then this time use it as 'TT03'.


In order to check last AI id- Select **"System Participants" __ "Agent Institution List"** all AI list will get displayed you can Click on **'Export to Excel'** and see last AI id configured, take the next series of it.

Agent Effective From :- Current Date

Effective To :- Advisable to keep blank

(If you put effective Date as 12/12/2025 then from this date this particular AI can't perform transactions)

Effective From 

Effective To 

Payment Channels*

- Select All**
- Internet
- Internet_Banking
- Mobile
- Mobile_Banking
- POS
- MPOS
- ATM
- Kiosk
- Bank_Branch
- Agent
- Business_Correspondent

Select appropriate Payment Channel, Internet Banking, Mobile Banking will be applicable in case of Bank, the co-operative bank only. Any non Bank AI for digital channel select Internet, Mobile

Registered Address		Communication Address	
Address 1*	<input type="text"/>	Address 1*	<input type="checkbox"/> [Same As Registered Address]
Address 2	<input type="text"/>	Address 2	<input type="text"/>
Address 3	<input type="text"/>	Address 3	<input type="text"/>
State*	<input type="text" value="Please Select"/>	State*	<input type="text" value="Please Select"/>
City*	<input type="text" value="Please Select"/>	City*	<input type="text" value="Please Select"/>
Pincode*	<input type="text" value="Please Select"/>	Pincode*	<input type="text" value="Please Select"/>
Country*	<input type="text" value="INDIA"/>	Country*	<input type="text" value="INDIA"/>

[Section B : Contact Details](#)

[Section C : Document Upload](#)

Request you fill Registered Address in the above fields. You can use different communication Address, or if you select on check box, then Reg add will be copied here automatically.

Section A: AI Details			
Section B : Contact Details			
1st Level Authorized Contact Person Info		2nd Level Authorized Contact Person Info	
First Name	Last Name	First Name	Last Name
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Designation	Department	Designation	Department
<input type="text" value="Please Select"/>	<input type="text" value="Please Select"/>	<input type="text" value="Please Select"/>	<input type="text" value="Please Select"/>
Mobile No (i.e. 9811111111)	Email ID (i.e.mailid@domain.com)	Mobile No (i.e. 9811111111)	Email ID (i.e.mailid@domain.com)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Fill the above Details

Section C : Document Upload

Document Name and Upload

Business Authorization Letter	<input type="button" value="Choose File"/>	No file chosen
License to Business Letter	<input type="button" value="Choose File"/>	No file chosen
Residential Address Proof	<input type="button" value="Choose File"/>	No file chosen
Aadhaar Card	<input type="button" value="Choose File"/>	No file chosen
Voter ID Card	<input type="button" value="Choose File"/>	No file chosen
Passport	<input type="button" value="Choose File"/>	No file chosen

In document request you to attach AI consent form, Front end approval mail proof. Then click on Upload document and click on submit.

Once you have submitted AI for approval, It will come to us, we will take further action on it. Post our approval AI will get Activate.