

Internet Banking

Job card
“How to Add
Beneficiary in Retail
Net banking”



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After Login to your Net Banking, This Dashboard will appear. Click on **Manage Beneficiary** option on left hand side under **Favourites** or **Transactions:- Transaction Support Services:- Manage Beneficiary**

The screenshot displays the Net Banking dashboard with the following navigation tabs: Dashboard, Accounts, Transactions, e-Services, e-Requests, and Social Sec. The 'Transactions' tab is active, showing three sub-sections: Transaction Management, Transaction Support Services, and Transaction Enquiry. The 'Transaction Support Services' sub-section is highlighted, and the 'Manage Beneficiary' option is selected and highlighted with a blue border. The left sidebar contains a 'Favourites' section with the following items: 24*7 Instant Transfer (IMPS), SelfLinked Account Transfer, Account Statement, Operative Accounts, Manage Beneficiary (highlighted), Initiate NEFT, Change Password, Set Limits, Tax Credit (View Form 28AS), e-FDR /e-CDR, ATM CARD SERVICES, Mobile Banking Services, and Submit Form 15G/H.

Transaction Management	Transaction Support Services	Transaction Enquiry
<ul style="list-style-type: none">▶ 24*7 Instant Transfer (IMPS)▶ Initiate NEFT▶ Initiate RTGS▶ Third Party Transfer WithIn Bank▶ Transfer To Self Linked Account▶ Initiate From Template▶ Set Limits	<ul style="list-style-type: none">▶ Manage Beneficiary▶ Confirmation Of Pending Beneficiary▶ Manage Templates▶ Generate MMID	<ul style="list-style-type: none">▶ View Saved Transaction▶ View Scheduled Transactions▶ View Recurring Instructions▶ View Completed Transactions▶ View All Transactions

The Below screen will appear after selecting Manage Beneficiary option. There are 3 options under Manage beneficiary:- a) Add within OBC b) View All Beneficiary c) Add Interbank Beneficiary(NEFT/RTGS/IMPS)

Favourites: Favourites > Manage Beneficiary > Manage Beneficiary

Manage Beneficiary

Option :

- Select
- Add Within OBC Beneficiary
- View All Beneficiary
- Add Interbank Beneficiary

Add Within OBC Beneficiary

To Add Third party beneficiary within OBC, enter their account details and maximum amount to be allowed per day and maximum no. of transactions to be allowed in this account per day.

CounterPartyRegistration

Option :

Beneficiary nickname should not be same as some previously added beneficiary

Beneficiary Nickname:*

Account Number:*

Account Name:*

Maximum Limit Amount(INR):*

Maximum amount that can be transferred to the beneficiary per day.

Maximum No of Transactions:*

Maximum no of transactions that can be made to the beneficiary in a day.

Enter Transaction Password & Select Mobile Number from dropdown and click on Submit button

Preview Confirmation Details

Option :

Name: XXXXXXXXXXXXXXXXXXXXXXXX

Nickname: XXXXXXXXX

Account Details

Account Number: XXXXXXXXXXXX

Additional Details

Maximum Limit Amount: INR 50,000.00

Maximum No of Transactions: 2

Enter your credentials to confirm the transaction

Confirmation Details


Transaction Password: 

Email ID (in case of J&K or NRI users):


Mobile Number:*

After Entering your Transaction Password, OTP will be sent on your selected mobile number. Kindly Enter OTP and click on confirm to confirm Beneficiary addition



 [100327] Counterparty Details added successfully with the id as 6740815

 [901052] Please initiate transaction after 5 hour of self-confirmation for Payee 6740815

 [106223] Record pending Self Confirmation

User Authentication Details

Enter Your Credentials

One Time Password:*

Confirm

Kindly enter OTP to complete Beneficiary self confirmation. You can also visit menu 'Transactions->Pending Self Confirmation' to confirm beneficiary later.


Resend OTP

After OTP Verification, the below message will be shown on your screen for successful beneficiary addition

Transactions: Transaction Support Services > [Manage Beneficiary](#) > Message post confirming Beneficiary



Beneficiary Confirmed

 [901174] Self-Confirmation Successfully completed.You shall be able to make Fund transfer to this beneficiary after 5 hour from now

To View/Modify Beneficiaries Added

Manage Beneficiary Details/Limits

Option :

Select option as View All Beneficiary

Search Criteria

Nickname:

Beneficiary Type:

IFSC Code:

Beneficiary List

Displaying 1 - 5 of 5 results

Select	Nickname	Account Number	IFSC Code	Beneficiary Type	Limit Amount	No. of Transactions
<input checked="" type="radio"/>	XXXXXXXX	XXXXXXXX	NA	Within Bank	INR 50,000.00	1
<input type="radio"/>	XXXXXXXX	XXXXXXXX	NA	Within Bank	INR 50,000.00	1
<input type="radio"/>	XXXXXXXX	XXXXXXXX	HDFC0000482	Inter Bank	INR 50,000.00	2
<input type="radio"/>	XXXXXXXX	XXXXXXXX	HDFC0003667	Inter Bank	INR 5,00,000.00	10
<input type="radio"/>	XXXXXXXX	XXXXXXXX	NA	Within Bank	INR 100.00	1

Select the Beneficiary you want to modify/delete from the checkbox

Download Details As:



After clicking on modify button, the below screen will be displayed. Now, you can edit Maximum limit amount per day & Maximum no. of transactions per day and to change Beneficiary Account details, delete this beneficiary using the delete button in the previous screen

Transactions: Transaction Support Services > Manage Beneficiary > AddWithinBankPayee



AddWithinBankPayee

Option :

Beneficiary ID: 6740815

Beneficiary Nickname:*

Account Name:*

Maximum Limit Amount(INR):*

Maximum amount that can be transferred to the beneficiary per day.

Maximum No of Transactions:*


Maximum no of transactions that can be made to the beneficiary in a day.

After OTP Verification, the below message will be shown on your screen for successful beneficiary addition

Transactions: Transaction Support Services > [Manage Beneficiary](#) > Message post confirming Beneficiary



Beneficiary Confirmed

 [901174] Self-Confirmation Successfully completed. You shall be able to make Fund transfer to this beneficiary after 5 hour from now

Add Interbank Beneficiary

Transactions: Transaction Support Services > [Manage Beneficiary](#) > AddInterBankPayee



Add InterBank Payee

Option :

Beneficiary Name:*

Beneficiary Nickname:*

Account Number:*

Confirm Account Number:*

IFSC Code:*

Enter Beneficiary Account Details

Beneficiary Bank Name & Address:

Maximum Limit Amount(INR):*
Maximum amount that can be transferred to the beneficiary per day.

Maximum No of Transactions:*
Maximum no of transactions that can be made to the beneficiary in a day.

Enter Maximum Limit Amount Per day and Maximum transactions per day to this beneficiary

I have read and I accept the Terms & Conditions

Enter Transaction password & select mobile number from dropdown to receive OTP on the number selected

Transactions: Transaction Support Services > Manage Beneficiary > Preview Confirmation Details



Preview Confirmation Details

Option :

Account Details

Name: XXXXX

Nickname: XXXX

Account Number: XXXXXXXX

IFSC Code

Beneficiary Bank Name:

Beneficiary Bank Address:

INDIA

Additional Details

Maximum Limit Amount: INR 50,000.00

Maximum No of Transactions: 2

Enter your credentials to confirm the transaction

Confirmation Details

Transaction Password:

Email ID (In case of J&K or NRI users):

Mobile Number:*



Enter OTP received on your Mobile Number, selected from the dropdown in the previous screen and then click on confirm to validate beneficiary added



[100327] Counterparty Details added successfully with the id as 6744047

[901052] Please initiate transaction after 5hr of self-confirmation for Payee 6744047

[106223] Record pending Self Confirmation

User Authentication Details

Enter Your Credentials

One Time Password:*


Kindly enter OTP to complete Beneficiary self confirmation. You can also visit menu 'Transactions->Pending Self Confirmation' to confirm beneficiary later.

You will get the below message reflected on your screen after successful beneficiary addition

Transactions: Transaction Support Services > Manage Beneficiary > Message post confirming Beneficiary



Beneficiary Confirmed

 [909019] Self-Confirmation successfully completed. You shall be able to make IMPS(P2A) Funds Transfer to this beneficiary after 1 hours and NEFT/RTGS Fund transfer after 5hours



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Incase if you have entered the beneficiary details but could not verify it in the process of Managing beneficiary, you can verify the same through Transactions:- Transaction Support Services:- Confirmation of Pending Beneficiary

Confirm New/Modified Beneficiary

Search Criteria

Requested Date From(dd/MM/yyyy):

Requested Date To(dd/MM/yyyy):

Reference Id:

Confirmation List

Displaying 1 - 2 of 2 results

Select	Reference Id	Payee Nick Name	Action	Requested Date
<input checked="" type="radio"/>	6740815	XXXX	Modify	29/05/2019
<input type="radio"/>	6743519	XXXX	Add	29/05/2019

Click here to confirm after selecting beneficiary to be confirmed from the list provided above



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In case of any issues, feel free to mail us at ibank@obc.co.in or call our customer care at 1800-180-1235, 0120-2580001