

This guide provides a comprehensive overview of the One-Time Mandate (OTM) process and its management through the NJ PMS Portal.

1. One-Time Mandate (OTM) Registration

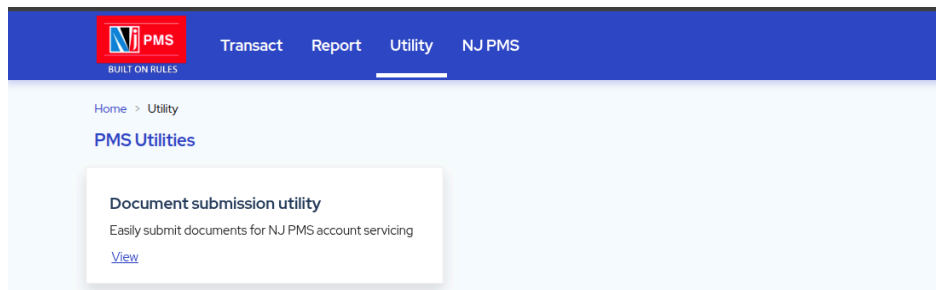
What is One-Time Mandate (OTM)?

A One-Time Mandate (OTM) is a one-time permission an investor gives their bank to allow NJ PMS to debit their account for up to the maximum amount specified in the OTM form, at the frequency the investor has selected in the mandate.

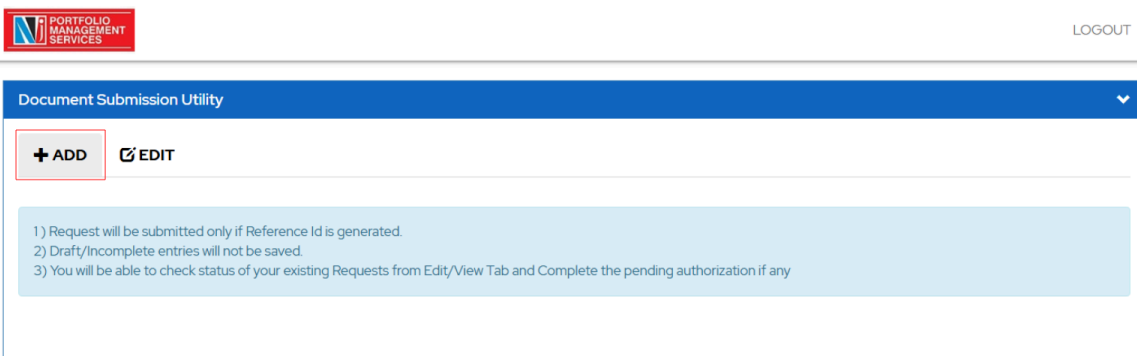
This facility helps ensure timely and seamless payment processing.

How to Register:

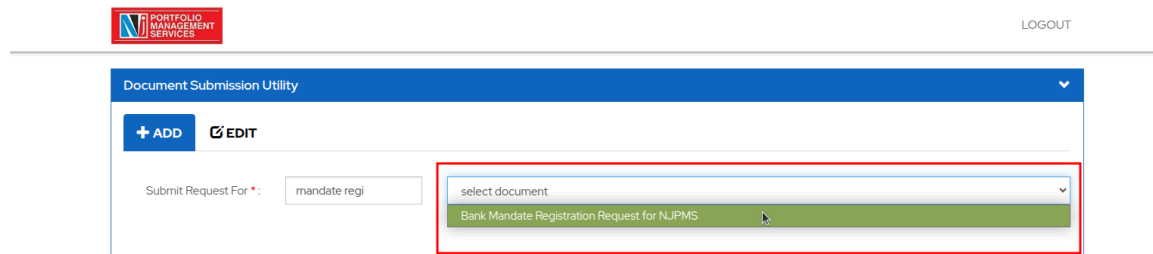
- Log in to the [PMS Desk](#) using your login credentials
- Go to the 'Utility' tab
- Click on 'Document Submission Utility'



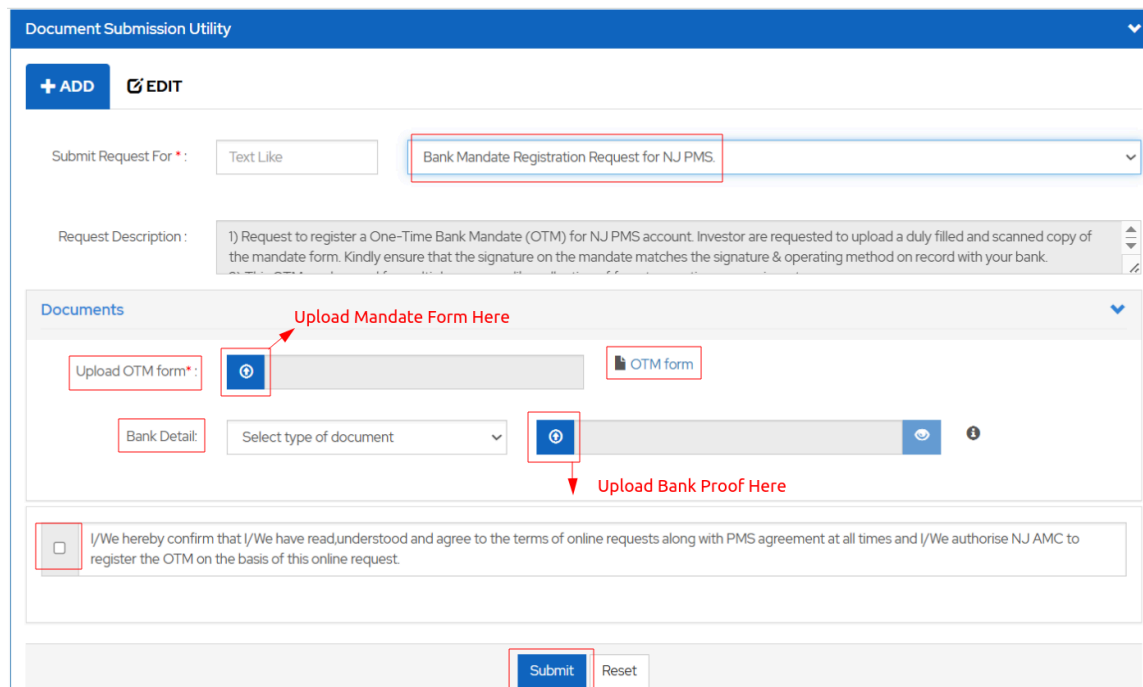
- Select 'ADD'



- Choose 'Bank Mandate Registration Request for NJPMS'



- Download the Mandate form, fill it accurately with the required details, and upload the scanned form.



- Click on the "Submit" button. With this, the investor will submit the request.

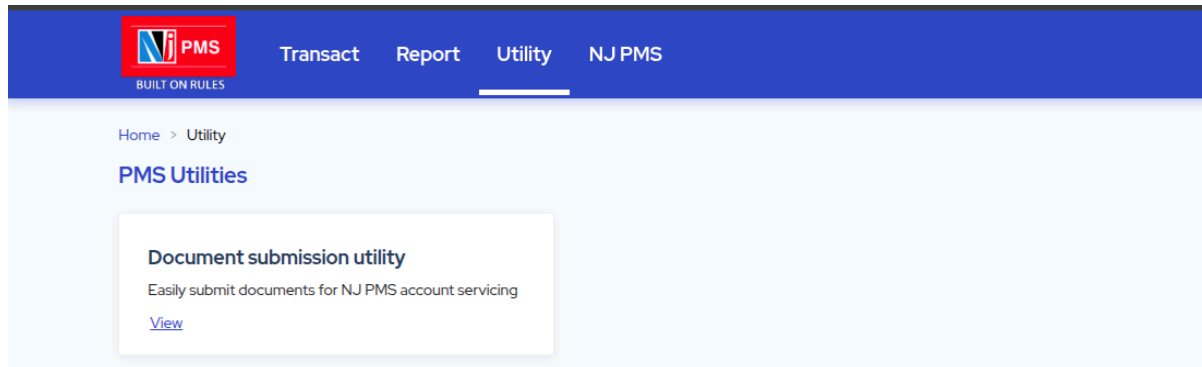
2. One-Time Mandate (OTM) Cancellation

What is One-Time Mandate (OTM) Cancellation?

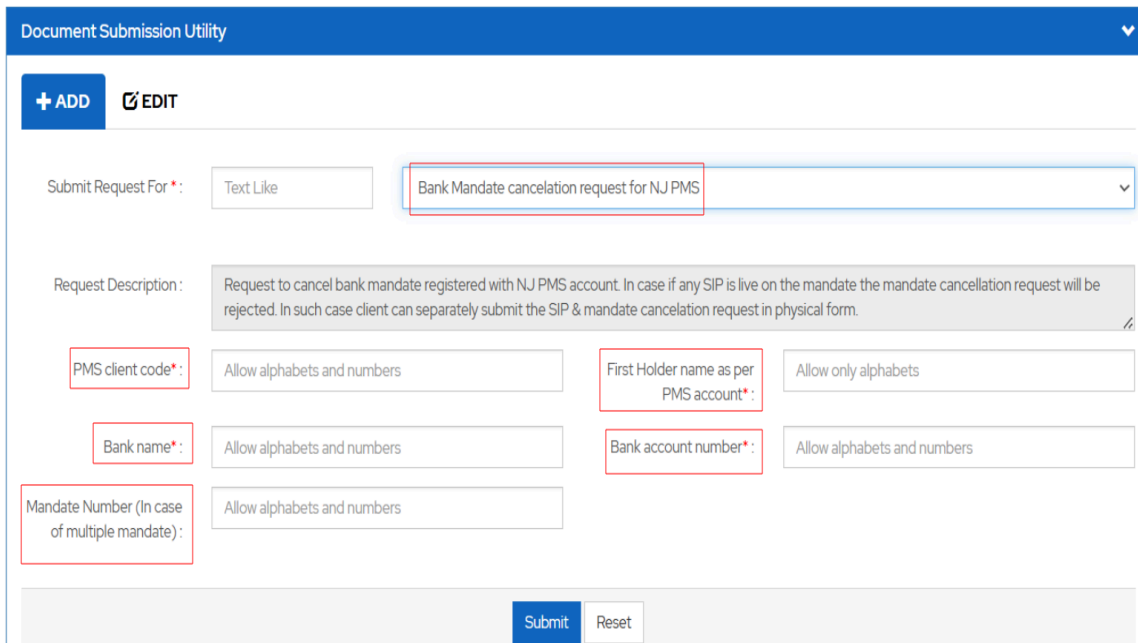
It is the permanent cancellation of the investor's registered mandate, which stops all future auto-debit transactions.

How to Cancel:

- Log in to the [PMS Desk](#) using your login credentials
- Go to the 'Utility' tab
- Click on 'Document Submission Utility'



- Select 'ADD'
- Choose 'Bank Mandate Cancellation Request for NJPMS'
- Fill in the required details and click on the 'Submit' button

The screenshot shows the 'Document Submission Utility' form. At the top, there's a blue header with the title and a dropdown arrow. Below the header, there are two buttons: '+ ADD' and 'EDIT'. The form contains several fields: 'Submit Request For *:' with a text input 'Text Like' and a dropdown menu showing 'Bank Mandate cancellation request for NJ PMS'; 'Request Description:' with a text area containing a detailed description; 'PMS client code*:' with a text input 'Allow alphabets and numbers'; 'First Holder name as per PMS account*:' with a text input 'Allow only alphabets'; 'Bank name*:' with a text input 'Allow alphabets and numbers'; 'Bank account number*:' with a text input 'Allow alphabets and numbers'; and 'Mandate Number (In case of multiple mandate):' with a text input 'Allow alphabets and numbers'. At the bottom, there are 'Submit' and 'Reset' buttons.
