

# ALL COMPANY ON BOARDING FORM FIELDS

## 1. Basic Company Information Form

### Purpose:

Captures the company's legal and business identity for compliance and organizational profiling.

### Fields:

- **Company Name**  
Registered legal name of the company as per government records.
  - **Brand/Trade Name**  
The business or trade name used publicly if different from the registered name.
  - **CIN (Corporate Identification Number)**  
Unique company registration number issued by the Ministry of Corporate Affairs (MCA).
  - **GSTIN (Goods & Services Tax Identification Number)**  
Government-issued tax identification number for GST compliance and invoicing.
  - **PAN (Permanent Account Number)**  
Mandatory tax identification number for corporate entities.
  - **Type of Organization**  
Specifies the company's legal structure (e.g., Pvt Ltd, LLP, Proprietorship).
  - **Industry / Sector**  
Identifies the main economic sector or industry of operation.
  - **Nature of Business**  
Describes whether the company is a manufacturer, trader, service provider, etc.
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## 2. Registered Address Form

### Purpose:

Records official business locations for legal, billing, and communication purposes.

### Fields:

- **Address Line 1**  
Primary address as per MCA or GST registration.

- **Address Line 2**  
Additional address details (optional).
  - **City**  
City or locality where the company is located.
  - **State / UT**  
State or Union Territory (dropdown list of all Indian states).
  - **PIN Code**  
Postal code corresponding to the address.
  - **Country**  
Default value set to “India”.
  - **Corporate Office Address**  
Secondary address if different from registered office.
  - **Billing Address**  
Address used for invoicing, if distinct from the registered office.
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### 3. Contact Information Form

**Purpose:**

Captures key communication channels for official correspondence and verification.

**Fields:**

- **Official Email Address**  
Primary company email used for official communication.
  - **Alternate Email**  
Secondary email for backup contact.
  - **Primary Phone Number**  
Company’s landline or primary business contact number.
  - **Mobile Number (Contact Person)**  
Mobile number used for OTP and verification.
  - **Website (if any)**  
Company’s official website, used for background verification.
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#### 4. Authorized Representative (Primary User) Form

**Purpose:**

Captures details of the person authorized to represent and manage the company profile.

**Fields:**

- **Full Name**  
Name of the authorized representative registering the company.
  - **Designation / Role**  
The official title or position of the representative.
  - **Email ID (Official)**  
Email used for login and account communications.
  - **Mobile Number**  
Used for OTP-based login, alerts, and verification.
  - **Government ID (Optional)**  
Optional ID proof (Aadhaar, PAN, etc.) for verification.
  - **Signature / Digital Authorization**  
Optional upload for verification or digital signing.
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#### 5. Procurement Preferences & Operations Form

**Purpose:**

Defines the company's buying behavior, payment preferences, and approval flow.

**Fields:**

- **Typical Procurement Categories**  
Multi-select options for commonly purchased goods or services.
- **Average Monthly Procurement Budget (₹)**  
Specifies the approximate monthly purchasing volume or range.
- **Procurement Type**  
Indicates whether procurement involves goods, services, or both.
- **Frequency of Procurement**  
How often the organization procures (e.g., monthly, annually).

- **Preferred Payment Terms**  
Defines payment structure (advance, credit, on delivery, etc.).
  - **Preferred Vendor Locations**  
Geographical preferences for sourcing vendors.
  - **Approval Workflow**  
Setup for multiple approvers in procurement (manager, CFO, etc.).
  - **Upload Purchase Policy (Optional)**  
Upload internal procurement guidelines for reference.
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## 6. KYC & Verification Documents Form

### **Purpose:**

Collects official documentation for compliance and authenticity verification.

### **Documents:**

- **Certificate of Incorporation**  
Proof of company registration from MCA.
  - **PAN Card (Company)**  
Mandatory proof of tax registration.
  - **GST Certificate**  
Document verifying GST registration.
  - **Udyam / MSME Certificate**  
Optional proof of small or medium enterprise status.
  - **Bank Cancelled Cheque / Bank Letter**  
Verifies bank account ownership for payouts.
  - **Authorisation Letter (if not director)**  
Authorizes a non-director to act on behalf of the company.
  - **Board Resolution (Optional)**  
Confirms internal approval for onboarding actions.
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## 7. Financial & Billing Details Form

**Purpose:**

Captures essential financial details for billing and payment settlements.

**Fields:**

- **Bank Name**  
Name of the company's banking institution.
  - **Branch**  
Branch name or location of the bank.
  - **Account Holder Name**  
Name of account holder (must match legal company name).
  - **Account Number**  
Business bank account number.
  - **IFSC Code**  
Unique code identifying the bank branch for fund transfers.
  - **Preferred Payment Method**  
Method of receiving or sending payments (NEFT, RTGS, UPI, etc.).
  - **Credit Limit / Term (if applicable)**  
Optional credit terms for repeat or long-term clients.
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**8. Compliance & Certifications Form****Purpose:**

Captures certifications and licenses to enhance business credibility.

**Fields:**

- **ISO Certifications**  
Relevant ISO standards (e.g., ISO 9001, 14001).
- **Environmental / Sustainability Certifications**  
ESG or sustainability-related accreditations.
- **Government Registrations**  
Registrations such as GeM or NSIC numbers.
- **Other Licenses**  
Industry-specific licenses like FSSAI or BIS.

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## 9. Internal Users / Team Members Form

### Purpose:

Allows the corporate to create and manage internal procurement team members.

### Fields:

- **Name**  
Full name of the team member.
- **Email**  
Email address used as the login credential.
- **Role / Access Level**  
Defines permissions such as Admin, Approver, or Viewer.
- **Mobile Number**  
Mobile number for OTP-based login.
- **Department / Cost Center**  
Department or business unit the user belongs to.

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## 10. Platform-Specific Settings Form

### Purpose:

Defines user preferences for communication and compliance acknowledgment.

### Fields:

- **Communication Preference**  
Preferred mode for notifications (Email, SMS, WhatsApp).
- **Preferred Language**  
Language selection for platform interface.
- **Notification Frequency**  
How often the user wants updates (immediate or daily digest).
- **Data Sharing Consent**  
Checkbox for user's consent to data processing.
- **Terms & Conditions / Privacy Policy Acceptance**  
Mandatory acceptance field for legal compliance.

