RA OS

B2B Tenant Onboarding Guide

A complete, section-by-section walkthrough of every Settings page — everything you configure here is yours alone.

RA Practice Management Platform

Welcome to RA OS

RA OS is a complete practice-management platform built for SEBI Registered Research Analysts. Every organisation on this platform — including yours — runs on completely isolated data and credentials. Nothing you enter below is ever shared with, or visible to, any other organisation on RA OS. This guide walks you through every setting, one section at a time, in the exact order they appear in your Admin Panel under **Settings**.

Rule of thumb used throughout RA OS: any field described below as "optional" simply keeps using a safe shared default until you fill it in — nothing breaks or changes until you actively save your own details.

1. Your Subdomain & Custom Domain

Page: **Domain & Microsite Setup**. This is usually the very first thing to set up — it decides the web address your own clients will use.

Step 1 — Your Subdomain (free)

- Choose a short, memorable subdomain (e.g. yourpractice) — this becomes yourpractice.[platform domain].
- This is free and instant — no approval needed.

Step 2 — Whitelabel: Your Own Custom Domain (paid add-on)

- If you own a domain (e.g. crm.yourbrand.com), enter it here.
- You will need to point your domain's DNS to RA OS as instructed on this page.
- This is a paid add-on — enable it first under Settings → Add-ons if you don't see this option.

Step 3 — Preview Your Microsite

A generic, ready-made public research-site template is already built for every tenant — once your domain is live, your own clients will see this microsite (not any other organisation's site) at your address.

2. Organization Profile

This is the core identity information used across every client-facing document (invoices, agreements, Welcome Kits, disclaimers) and every compliance report.

- **Organization Name** — your registered business name.
- **SEBI Registration Number** — your own INH... registration number (never the platform owner's).
- **BSE Enlistment Number** — your own enlistment number.
- **Disclaimer & Disclosure Page URL** — a public page on your own site/microsite carrying your SEBI disclosures.

3. Logo & Favicon

Upload your own logo (shown in your site header) and favicon (the browser-tab icon) — applies to your subdomain or custom domain alike. Upload actual image files, not a pasted URL.

4. Investor Charter

Upload your own Investor Charter document (a SEBI-mandated disclosure), shown to clients in their Welcome Kit.

5. Agreement / MITC Template

Upload your own Client Agreement / MITC (Most Important Terms and Conditions) PDF template — this is the exact document your clients digitally sign via Aadhaar e-sign during onboarding.

6. General Details

Extended organisational details used in periodic compliance reporting (BSE Annexures, Annual Compliance Audit).

7. GST & Company Details

Enter your own GSTIN only if you are GST-registered — leave blank if you're below the threshold. This prints on your own invoices only, never mixed with any other organisation's.

8. Compliance Officer & Registered Addresses

- Compliance Officer name/designation/contact.
- **Registered Office Address**, **Correspondence Address**, and **Address of Principal Place of Business** — each entered separately.

9. Branch Addresses

Add every branch office address you operate from, if any.

10. Key People

- **Contact Person** — your main point of contact.
- **Dedicated Officer (DO)** — for complaint redressal, a SEBI requirement.
- **Principal Officer**.
- **Managing Director / Managing Partner**.
- **Other Directors / Partners**.
- **Shareholding Pattern** — anyone holding 10%+ of your entity.

11. Websites, Social Media, Bank Accounts, NISM & UPI

- **Websites** — any public website(s) you operate.
- **Social Media Handles** — your own official handles.
- **Bank Accounts** — your own registered bank account(s), for record-keeping.
- **NISM Certifications** — your own NISM-Series-XV (Research Analyst) certification details.
- **UPI Handles** — see Payment Methods below for how this is actually used for collecting client payments.

12. Messaging Channels

Use your OWN Telegram bot, WhatsApp number, and email sender — never the platform's shared ones. Every field below is optional and independently switchable; leave any of them blank to keep using the safe shared default for that channel only.

12.1 Telegram

- Message **@BotFather** on Telegram to create your own bot and get its token.
- Add that bot to each of your Telegram groups and promote it to Admin (a bot cannot add/promote itself).
- Paste the **Bot Token** into RA OS, then click **Detect My Groups** — no need to manually find each group's numeric chat ID.
- Set up one or more **Group Chat ID(s) per Category** (Equity, Options, Futures, etc.) — a combo plan needs its clients added to BOTH relevant category groups.
- Click **Register Telegram Webhook** so client replies show up in your own Telegram Inbox.
- Optional: enter your own personal Telegram chat ID to receive a copy of every Welcome Kit sent to a client, so you always see exactly what was delivered.

12.2 WhatsApp

- Requires your own Meta Business/WhatsApp Cloud API app.
- Enter your **Phone Number ID**, **Access Token**, **Webhook Verify Token**, and **App Secret**.
- Set the shown webhook URL in your own Meta App dashboard.
- Note: WhatsApp is currently inbound-reply only (Meta's own policy) — not for outbound broadcast.

12.3 Email — Resend or Gmail (choose one or both)

By default, client emails (Welcome Kit, OTPs, invoices, notifications) go through the platform's shared account. Set up your own below:

Option A — Resend (recommended)

- Create a Resend account and verify your own sending domain.
- Enter your **Resend API Key** and **From Address**.

Option B — Gmail SMTP (simpler, free)

- Use any Gmail account with 2-Step Verification turned on.
- Generate an App Password at myaccount.google.com/apppasswords (NOT your normal Gmail password).
- Enter your **Gmail Address** and the generated **App Password**.
- Note: emails will visibly come from this Gmail address, not a branded domain.

If both Resend and Gmail are configured, Resend is tried first — your own Gmail automatically becomes the backup if Resend ever fails, so your clients' emails keep getting through.

13. Broker Connection (Performance Tracker)

Connect your OWN broker account (paid add-on) to power a live P&L view on Trade Dispatch, for your own internal use only — never shown to clients directly.

- Connect your own Fyers Developer App (App ID/Secret) — never shared with any other organisation.
- Enable **Daily Auto-Login** so the access token (which expires daily) refreshes automatically every morning before market open.

14. Payment Methods

Choose which payment method(s) your own clients see at their payment step.

- **Valid UPI** — free, manual-verification option. Enter your own UPI ID (SEBI "Valid UPI" format: something@validbank) and upload your own QR code image. You verify each payment yourself using the client's UTR.
- **Razorpay** — see below for your own account.

14.1 Your Own Razorpay Account

By default, client payments route through the platform's shared account. To collect payments directly into YOUR OWN account:

- Enter your own **Razorpay Key ID**, **Key Secret**, and **Webhook Secret**.
- Register the exact webhook URL shown (once saved) in your own Razorpay Dashboard → Settings → Webhooks, subscribed to payment_link.paid, payment.captured, and payment.failed.

15. Your Own PaRRVA Credentials

Required for compliance. By default, trade calls are submitted to PaRRVA through the platform's shared enrolment. If you have your own SEBI RA registration and PaRRVA enrolment:

- Enter your own **PaRRVA Enrolment ID**, **Password**, **Auth URL**, and **Trade Base URL**.
- Once filled in, YOUR trade calls are filed under YOUR OWN enrolment, never the platform's.

16. Your Own Digio Credentials

Required for compliance — a client's e-sign must run under YOUR OWN Digio registration, not the platform's shared account.

- Enter your own **Digio Client ID** and **Client Secret**.
- A Base URL override is optional — leave blank to use the platform default (production: api.digio.in).

17. Your Own CVL KRA Credentials

Required for compliance — a client's KYC must run under YOUR OWN CVL KRA registration; one RA's KYC checks may never run through another RA's account.

- Enter your own **Username**, **Password**, **POS Code**, **Base URL**, **API Key**, and **AES Key** (obtained from CVL KRA when you register with them directly).
- All 6 fields are required together before your own account is used — a partially-filled set falls back to the shared default, same as leaving everything blank.

18. PaRRVA Verified Performance — Public Display

Turn this on to show a real, SEBI PaRRVA-verified track-record section on your own public site — off by default, so nothing appears until you explicitly enable it. Reads live performance data once PaRRVA has enough trade history for you specifically.

19. Google Drive Auto-Backup

One-click, daily backup of your entire RA OS account data into your OWN Google Drive — paid add-on. Connect your own Google account (never shared with any other organisation).

20. Security

20.1 Two-Factor Authentication (MFA)

Strongly recommended — this login has access to every one of your clients' KYC, payment, and agreement data. Enable an authenticator app (Google Authenticator, Authy, or any TOTP app) as a second login step.

20.2 Passkeys

Set up Touch ID / Windows Hello as an alternative, even stronger login method.

20.3 Alternate Login Emails

Add additional email addresses that can also log in to your own admin account.

21. Verification Documents

Upload the documents that verify your own organisation's identity and SEBI registration (see the sign-up checklist in Section 22 below for the exact list).

22. How You Actually Joined RA OS — Self-Service Sign-Up

For reference, this is the process every new organisation goes through to get onto RA OS in the first place:

- Choose and check availability of your subdomain.
- Upload the required documents: SEBI registration certificate, GST certificate, PAN, bank proof, Aadhaar, and a short video-KYC.
- Your submission enters a manual-review queue — the platform owner reviews and approves new organisations before they go live.
- Once approved, you get your own admin login and can start working through Sections 1–21 of this guide, in any order, at your own pace.

Document Control

Version 1.0 - Prepared 11 August 2026. Scope: every Settings-page section as of this date. Screenshots are not included in this revision; a future revision may add them.