



Distributor Data Upload – User Guide

This user guide provides step-by-step instructions for Portfolio Managers to upload distributor data, through the APMI Member Portal. It covers accessing the portal, navigating to the Distributor Data Upload utility, uploading data in the prescribed file format, and viewing previously submitted data for a given quarter.

1. Access the APMI Portal

Visit the APMI website at www.apmiindia.org and click on “Login For APMI Members”

2. Log in to the portal using your existing APMI credentials.



Upon successful login, you will be directed to the dashboard of your home page.

The screenshot displays the APMI dashboard interface. At the top, there is a header bar with the APMI logo on the left and user information on the right, including 'Session expires in 29m 41s', 'Member ID 9134', 'Current Time 25th August, 2026 17:44:21', and 'WELCOME, pms_member'. Below the header, the main content area is divided into two sections: 'AUM Movement' and 'Performance Chart'. Each section has a tab for 'Discretionary IA' and 'Non Discretionary IA', a 'Select IA' dropdown, a 'Submit' button, and a download icon. An 'Export To PDF' button is located in the top right corner of the dashboard area. The footer of the dashboard area contains the text 'Copyright © 2023. All Rights Reserved.'

3. Click on the three-line menu icon located at the top-left corner of the screen.

This screenshot is identical to the one above, showing the APMI dashboard. However, a red circle is drawn around the three-line menu icon (hamburger menu) located in the top-left corner of the dashboard area, next to the APMI logo.



4. Select the “Utilities” tab.

The screenshot shows the APMI dashboard interface. The top navigation bar includes the APMI logo, session expiration (27m 30s), member ID (9134), current time (25th August, 2026 17:46:32), and a welcome message (WELCOME, pms_member). The left sidebar contains a menu with the following items: Dashboard, Masters, Utilities (highlighted with a red box), Reports for the Portfolio Manager, Performance Reports, Help Videos for Uploading Reports, Compliance Sutra, Query Management, Compliance Calendar, Download Distributor Compliance Certificate, Download Annual Declaration of Self-Certification (DSC)- FY 2025-26, and CSCR Policy Templates. The main content area displays a form for uploading reports, with a dropdown menu set to 'Discretionary IA' and a 'Submit' button. Below this, there is a 'Performance Chart' section with a dropdown menu set to 'Discretionary IA' and a 'Submit' button. The URL at the bottom is <https://test.apmiindia.org/apmi/dashboard.htm#>.

5. From the submenu, select “Distributor Data Upload.”

The screenshot shows the APMI dashboard interface. The top navigation bar includes the APMI logo, session expiration (29m 46s), member ID (0004), current time (27th August, 2026 09:14:37), and a welcome message (WELCOME, membership@apmiindia.org). The left sidebar contains a menu with the following items: Dashboard, Masters, Utilities, Reports for the Portfolio Manager, Performance Reports, Help Videos for Uploading Reports, Compliance Sutra, Query Management, Compliance Calendar, Download Distributor Compliance Certificate, Download Annual Declaration of Self-Certification (DSC)- FY 2025-26, and CSCR Policy Templates. The main content area displays a form for uploading reports, with a dropdown menu set to 'Discretionary IA' and a 'Submit' button. Below this, there is a 'Performance Chart' section with a dropdown menu set to 'Discretionary IA' and a 'Submit' button. The URL at the bottom is <https://apmiindia.org/apmi/distributoraupload.htm>.



6. Upload and View Options

On selecting the Distributor Data Upload Option, the below screen will be displayed with the following two options **Upload** and **View**.

Upload: This option is used to upload distributor details for the previous quarter-end.

View: This option enables you to view the data uploaded by you for the previous quarter (if any).

The screenshot shows the 'Distributor Data Upload' interface. At the top, there is a header bar with the APMI logo, session information (Session expires in 28m 26s, Member ID 0004, Current Time 27th August, 2026 09:14:07), and a welcome message (WELCOME, membership@apmiindia.org). Below the header, the 'Distributor Data Upload' section contains two buttons: 'Upload' and 'View'. The 'Upload' button is highlighted with a red circle.

7. Uploading Distributor Details - Click on the **Upload** Option for uploading the quarter end distributor data

The screenshot shows the 'Distributor Data Upload' interface with the 'Upload' button highlighted by a red circle. The form contains the following fields and buttons:

- Member Name ***: APMI Test
- Applicable Quarter ***: Q2-2026
- Upload File ***: Select File... (Browse button), Download Sample File (link)
- Submit** and **Reset** buttons

A note below the form states: "Only XLS/XLSX files are Imported."



7 (a). Upload Process

1. The **Portfolio Manager Name** will be displayed automatically.
2. The **Applicable Quarter** will indicate the quarter for which the data is pending for upload.
3. The file format to upload the distributor data is available as a link << **Download Sample File**>>, below the Upload File option.
4. The **explanation for this file structure** is given below and is also available in the **Help Sheet** of the Sample File format

Field in the Sample File	Format / Type	Remarks
Member ID	Alpha-numeric	As allotted by APMI. Mandatory for all Portfolio Managers registered with APMI as members. The Email ID field may be left blank.
Email ID	Text	Mandatory for non-members, i.e., Portfolio Managers registered with APMI as non-members. The Email ID should be that of the Principal Officer. The Member ID field may be left blank.
APRN	Alpha-numeric	As allotted by APMI to your distributor.
Empanelment Date	DD/MM/YYYY	The empanelment date cannot be a future date. For example, if data is being uploaded for the June 2026 quarter, the empanelment date cannot be July 2026 or any subsequent date.
Quarter	Alpha-numeric	The quarter should be specified in calendar-quarter format. For example, January–March 2026 should be entered as Q1-2026, while July–September 2026 should be entered as Q3-2026.
AUM	Numeric	This is a mandatory field, and a value is required. If you prefer not to disclose the information, please enter 0.00

5. Select the file to be uploaded and then Click on **Submit**.
6. If the file contains errors, the system will generate an error file containing the relevant remarks.
7. If the upload is successful, the system will display a success message.

5. Viewing Previously Uploaded Data

To review previously uploaded data click the “View” tab.

The screenshot displays the 'Distributor Data Upload' interface. At the top, there's a navigation bar with session details: 'Session expire in 18m 37s', 'Member ID 0004', 'Current Time 27th August, 2026 09:34:31', and a welcome message 'WELCOME, membership@apmiindia.org'. Below this, the 'Distributor Data Upload' section has two tabs: 'Upload' and 'View'. The 'View' tab is selected and circled in red. Under the 'View' tab, there's a form with the following elements:

- Applicable Quarter ***: A dropdown menu with the placeholder text '--SELECT APPLICABLE QUARTER--'.
- APRN No. (comma separated upto 10 values allowed)**: A text input field with the example 'Ex: APRN00001,APRN000001'.
- Buttons: 'Submit', 'Export to Excel', and 'Reset'.

At the bottom of the page, there is a copyright notice: 'Copyright © 2023. All Rights Reserved.'



1. Select the relevant quarter for which you wish to view your previously uploaded data.
2. You may optionally enter a specific APRN to view the corresponding details.
3. If you wish to view data for all APRNs for a particular quarter, leave the APRN field blank.

Important :

1. **The upload utility shall be active only for the first 10 days of the succeeding month after the end of the quarter.**
2. **We request all the PMS entities to upload the requisite data before the deadline.**
3. **For any further queries please feel free to reach us at support@apmiindia.org**

----- End of Note -----