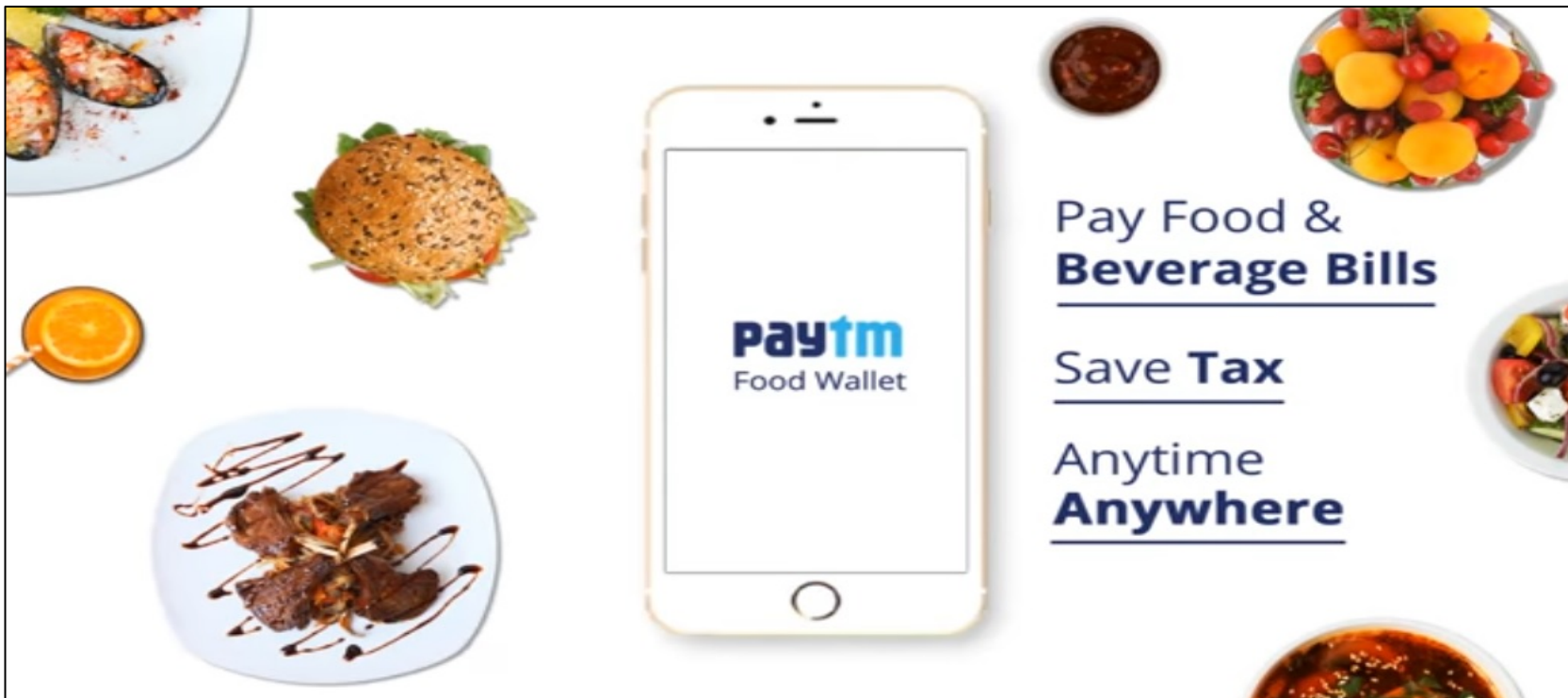# Food Wallet- Training for merchants

In this module we will discuss:

1. What is Food wallet?
2. How to login and access Food wallet on the merchant panel
3. Understanding business wallet, sub-wallet & customer wallet
4. Understanding various tabs on the panel
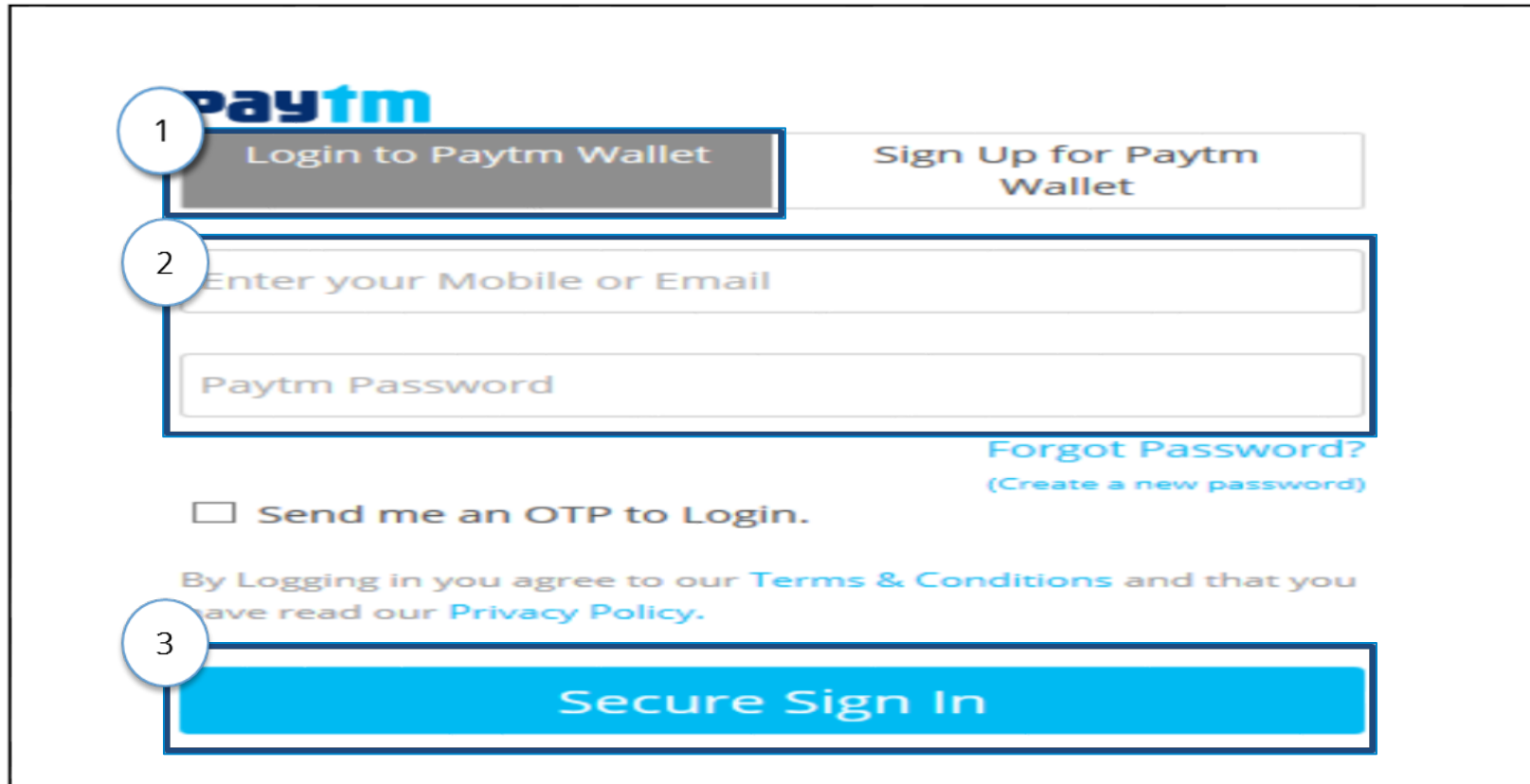5. What are the various reports available

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Food wallet

Corporates can opt for Food wallet which can be provided to the employees as an additional benefit which would also help the employees save tax. Employees can opt for Food wallet facility and while paying for any edible item, amount would get deducted from their Food wallet. It's a quick and easy method of payment on the go

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Login to Merchant panel & access Food Wallet

Login to the panel - https://dashboard.paytm.com/

① Click on **Log in**

② Enter your access details

③ Click on **Secure Login**

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Reset Password

1   Click on **Forgot Password?**

Paytm

Reset Password

Forgot Password?

Back

2

Enter your Mobile or Email

We will send a link on your registered email or One Time Password (OTP) on your mobile to reset your password.

3

Get Password

2   Enter Paytm registered mobile number / email

3   Click on **Get Password**

A link will be sent to the registered mobile number / email that will redirect you to changing your password page

Understand wallet types

Business Wallet- Your primary wallet is where funds would be transferred by Paytm in lieu
of fund received against the business entity

Sub -Wallet- Funds are transferred from the business wallet to sub wallet/food wallet which would be created by organizations and then
employees can use the fund stored for buying edibles, multiple sub wallets can be created as per requirement

Employee/Customer Wallet- This is the regular Paytm wallet of any shopkeeper who will be the end beneficiary

PAYtm
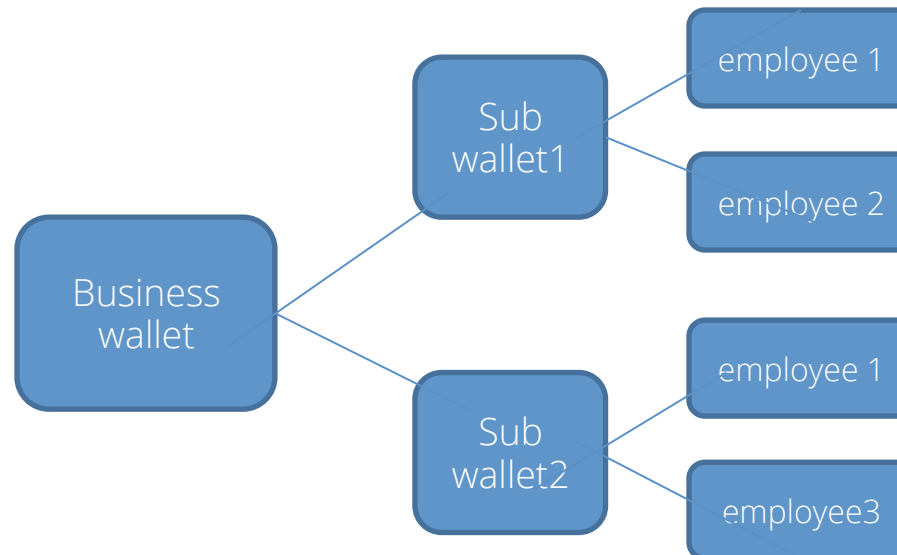
Add sub users to the panel – Step 1

You can create sub users with restricted access. Use mobile number or email to create sub-users from the "Sub Users" tab under the Settings section

Sub User Details

2 Add New Sub-User

User Name	Email	Phone	Access granted on	Access Last updated	Actions
917838040955		7838040955	ROLE_GRATIFICATION , ROLE_SUBWALLET_APPROVE	Dec 7, 2016 5:35:52 AM	Edit Delete
keyurd1	keyurd1@gmail.com	9428716961	ROLE_FOOD , ROLE_GRATIFICATION , ROLE_SUBWALLET_ADDFUND , ROLE_SUBWALLET_CREATE , ROLE_SUBWALLET_DISBURSE	Apr 6, 2017 2:54:36 PM	Edit Delete
Prerna Kalra	prerna.2210@gmail.com	7838437696	ROLE_GRATIFICATION , ROLE_SUBWALLET_APPROVE	Feb 6, 2017 2:17:32 PM	Edit Delete
sheilli.johiya	sheilli.johiya@gmail.com	9711723423	ROLE_FOOD , ROLE_GIFT , ROLE_GRATIFICATION , ROLE_MANAGE_SUBWALLET , ROLE_SUBWALLET_ADDFUND , ROLE_SUBWALLET_APPROVE , ROLE_SUBWALLET_CLAIM , ROLE_SUBWALLET_CREATE , ROLE_SUBWALLET_DISBURSE	Apr 28, 2017 11:59:28 AM	Edit Delete
diwnaveen	diwnaveen@gmail.com	9654229629	ROLE_FOOD	Dec 2, 2016 5:17:59 PM	Edit Delete
Nitin Pandey	nitin.pandey@paytm.com	7065533474	ROLE_GRATIFICATION , ROLE_SUBWALLET_ADDFUND , ROLE_SUBWALLET_DISBURSE	Jul 29, 2016 3:40:06 PM	Edit Delete
preet.kashyap02	preet.kashyap02@gmail.com	9582544116	ROLE_FOOD	Apr 26, 2017 10:22:10 AM	Edit Delete

1 Click on **Sub Users** under **Settings** tab

2 Click on **Add New Sub-User**

2 A To Edit or Delete an already existing sub user **click** on appropriate option

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Add sub users to the panel – Step 2

Add Sub-User

STEP 1/2

Enter Email/Mobile to add Sub-User

999999999

Proceed   Cancel

Add Sub-User

STEP 2/2

New Sub User

2544116 ✓

Roles

- ☑ ROLE_FOOD
- ☐ ROLE_GIFT
- ☐ ROLE_GRATIFICATION
- ☐ ROLE_MANAGE_SUBWALLET
- ☐ ROLE_SUBWALLET_ADDFUND
- ☑ ROLE_SUBWALLET_APPROVE
- ☑ ROLE_SUBWALLET_CLAIM
- ☐ ROLE_SUBWALLET_CREATE
- ☑ ROLE_SUBWALLET_DISBURSE

Save User   Cancel

3 Enter email / mobile number
This can be either Paytm registered or not
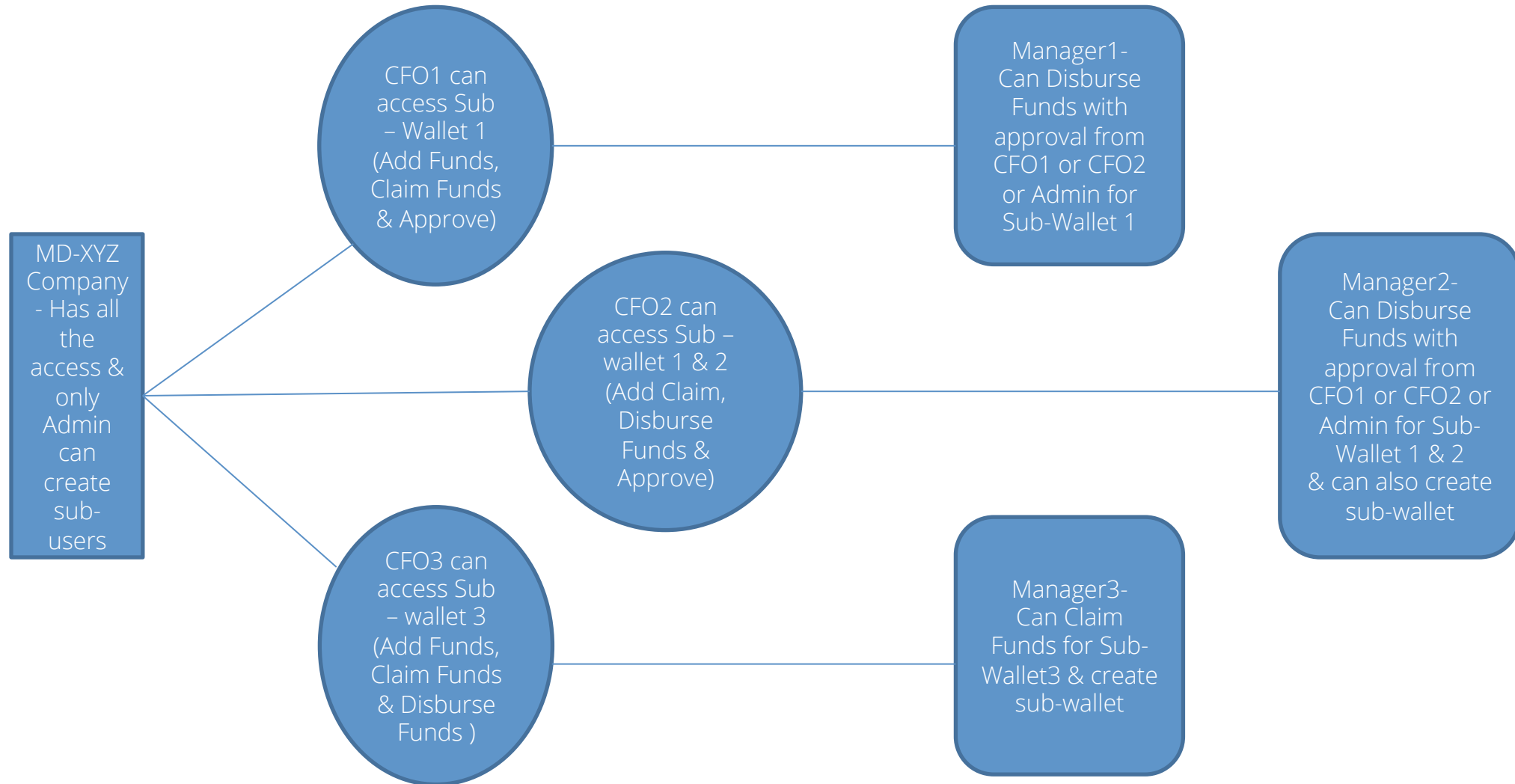
4 Click on **Proceed**

5 Choose the wallet type and then roles or views that sub user can see

6 Click on **Save user**

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You can look at the following example to understand how roles can be assigned by Admin that is you to your sub-users for different sub-wallets. We are looking at the structure of XYZ Company:

MD-XYZ Company - Has all the access & only Admin can create sub-users

CFO1 can access Sub – Wallet 1 (Add Funds, Claim Funds & Approve)

CFO2 can access Sub – wallet 1 & 2 (Add Claim, Disburse Funds & Approve)

CFO3 can access Sub – wallet 3 (Add Funds, Claim Funds & Disburse Funds)

Manager1- Can Disburse Funds with approval from CFO1 or CFO2 or Admin for Sub-Wallet 1

Manager2- Can Disburse Funds with approval from CFO1 or CFO2 or Admin for Sub-Wallet 1 & 2 & can also create sub-wallet

Manager3- Can Claim Funds for Sub-Wallet3 & create sub-wallet

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Approvals of uploaded file

Under this tab Admin or Sub-User with access to Approve can View, Download, Approve or Reject the file that has been generated by releasing Disbursement, once approval/rejection is done, user can only download the file
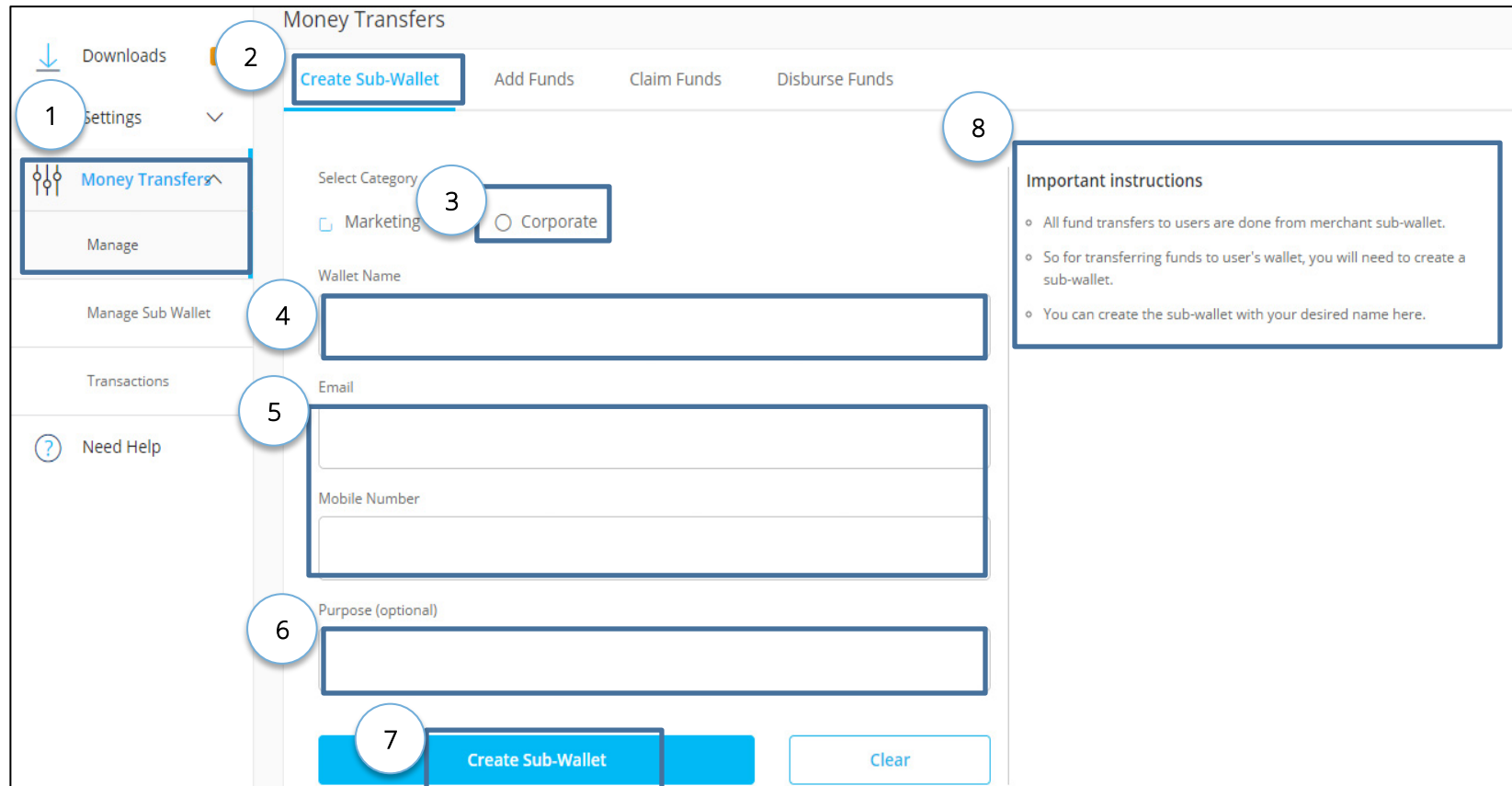

1   Click on **Approvals** under Settings

2   Here you can see the file uploaded, Select the file & click on **Action** to Approve, reject or Download the file

NOTE: Files that need action would reflect in white, rejected files would reflect in red and approved files would reflect in blue

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Create Sub-Wallet

You can create sub wallets by clicking on sub wallet tab and following the mentioned steps

Money Transfers

Create Sub-Wallet   Add Funds   Claim Funds   Disburse Funds

Select Category

☐ Marketing   ○ Corporate

Wallet Name

Email

Mobile Number

Purpose (optional)

Create Sub-Wallet   Clear

Important instructions

- All fund transfers to users are done from merchant sub-wallet.
- So for transferring funds to user's wallet, you will need to create a sub-wallet.
- You can create the sub-wallet with your desired name here.

Downloads

1 Settings ⌄

Money Transfers ⌃

Manage

Manage Sub Wallet

Transactions

? Need Help

1 Click on **Money Transfer– Manage**

2 Click on Create **Sub-Wallet**

3 If you have multiple wallet access then two categories would reflect. **Select** Corporate for Food Wallet

4 **Type** a wallet name

5 **Enter** email ID & mobile no.

6 **Put** a purpose (Optional)

7 Click on **Create Sub-Wallet**

8 **Read** the instructions

Paytm

Add Money to sub wallet

You can transfer money to your sub wallet by following these steps

1. Click on **Money Transfer– Manage**

2. Click on **Add Funds**

3. Under **To** select Sub-Wallet

4. **Enter** the amount

5. Click on **Transfer**

6. **Read** the instructions

NOTE: Amount entered should be equal to or less than the amount available in business wallet

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Send money back to Business wallet

Amount can also be rolled back from Sub-wallet to Business wallet, follow these steps

1. Click on **Money Transfer– Manage**

2. Click on **Claim Funds**

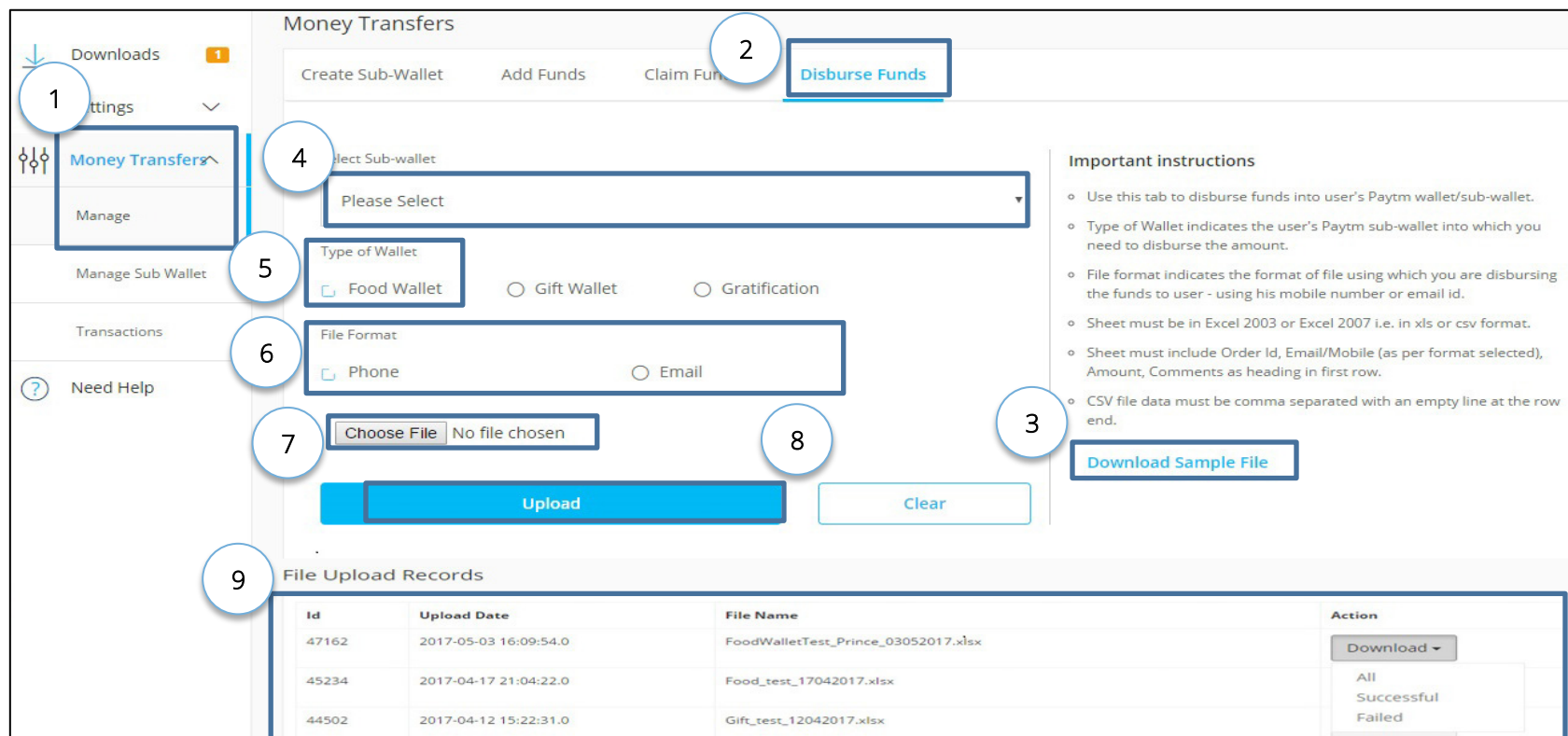3. Under **From** select Sub-Wallet

4. **Enter** the amount

5. Click on **Transfer**

6. **Read** the instructions

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Disburse Funds

By following these steps, funds can be disbursed to employee's wallet

1. Click on **Money Transfer-- Manage**

2. Click on **Disburse Funds**

3. **Click** to Download Sample File & manually fill the data

4. **Select** the Sub-wallet, you want to transfer the amount from

5. **Select** Food under Type of wallet

6. **Select** phone or email

7. **Choose** the saved xls or csv file

8. Click on **Upload**

9. All the files uploaded would reflect here, it can be filtered and downloaded status wise

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Provide access right to Sub-User for specific Sub-Wallet Step-1

For accessing any specific Sub-Wallet each Sub-User will require a permission from Admin that was provided while creating Sub-User and those rights need to be made active from the "Manage Sub-Wallet" tab

1 — Click on **Manage Sub Wallet** under Money Transfer

2 — A new Sub wallet which has been created but not mapped with Sub Users would look like this with a red cross sign, **Click** on edit next to it to enable mapping

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Provide access right to Sub-User for specific Sub-Wallet Step-2

Cashback
User Mappings

4 Secondary Verification

5 Select Checker Mode
● ALL   ○ SINGLE

6

UserName	Roles	Usage Access	Verification Access
917838040955	ROLE_GRATIFICATION , ROLE_SUBWALLET_APPROVE ,	OFF	ON
keyurd1	ROLE_FOOD , ROLE_GRATIFICATION , ROLE_SUBWALLET_ADDFUND , ROLE_SUBWALLET_CREATE , ROLE_SUBWALLET_DISBURSE ,	ON	OFF
Prerna Kalra	ROLE_GRATIFICATION , ROLE_SUBWALLET_APPROVE ,	OFF	ON

7

8 Update Mapping   Close

4 **Click** on secondary verification which would enable Approvals from Admin or another Sub-User having right to approve

5 **Click** on All to select multiple Approver & in this case approval is required from every approver

6 **Click** on Usage access button next to Sub-User to activate usage access

7 **Click** on Verification access button next to Sub-User to activate Approval access, for approving Sub-User need to have access to specific wallet and Approval right

8 **Click** on Update Mapping

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Provide access right to Sub-User for specific Sub-Wallet Step-3

Cashback
User Mappings

Secondary Verification

Select Checker Mode

○ ALL   ◉ SINGLE ⑨

UserName	Roles	Usage Access	Verification Access
917838040955	ROLE_GRATIFICATION , ROLE_SUBWALLET_APPROVE ,	⚪ (off)	🔵 (on) ⑪
keyurd1	ROLE_FOOD , ROLE_GRATIFICATION , ROLE_SUBWALLET_ADDFUND , ROLE_SUBWALLET_CREATE , ROLE_SUBWALLET_DISBURSE ,	🔵 (on) ⑩	⚪ (off)
Prerna Kalra	ROLE_GRATIFICATION , ROLE_SUBWALLET_APPROVE ,	⚪ (off)	⚪ (off)

⑫ **Update Mapping**   Close

⑨ **Click** on Single & any one approver can go ahead with the approval

⑩ **Click** on Usage access to activate usage of Roles assigned

⑪ **Click** on Verification access button next to Sub-User to activate Approval access, for approving Sub-User need to have access to specific wallet and Approval right

⑫ **Click** on Update Mapping

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Transaction Report

This report will allow you to check & download your daily transaction report status wise.

1. Click on **Transaction** under Money Transfer

2. Apply the date filter (Max 1 month)

3. **Select** Transaction type

3 A. Apply additional filters

4. Click on **Search**

5. Transaction summary will pop up below

6. Click on **Download** to download the report

NOTE: Available report status- Success, Pending & Failure

![Paytm]

Downloading requested reports

Download reports from this section you requested for download by clicking on download option under a particular report tab. This tab shows the 20 recent downloaded reports only

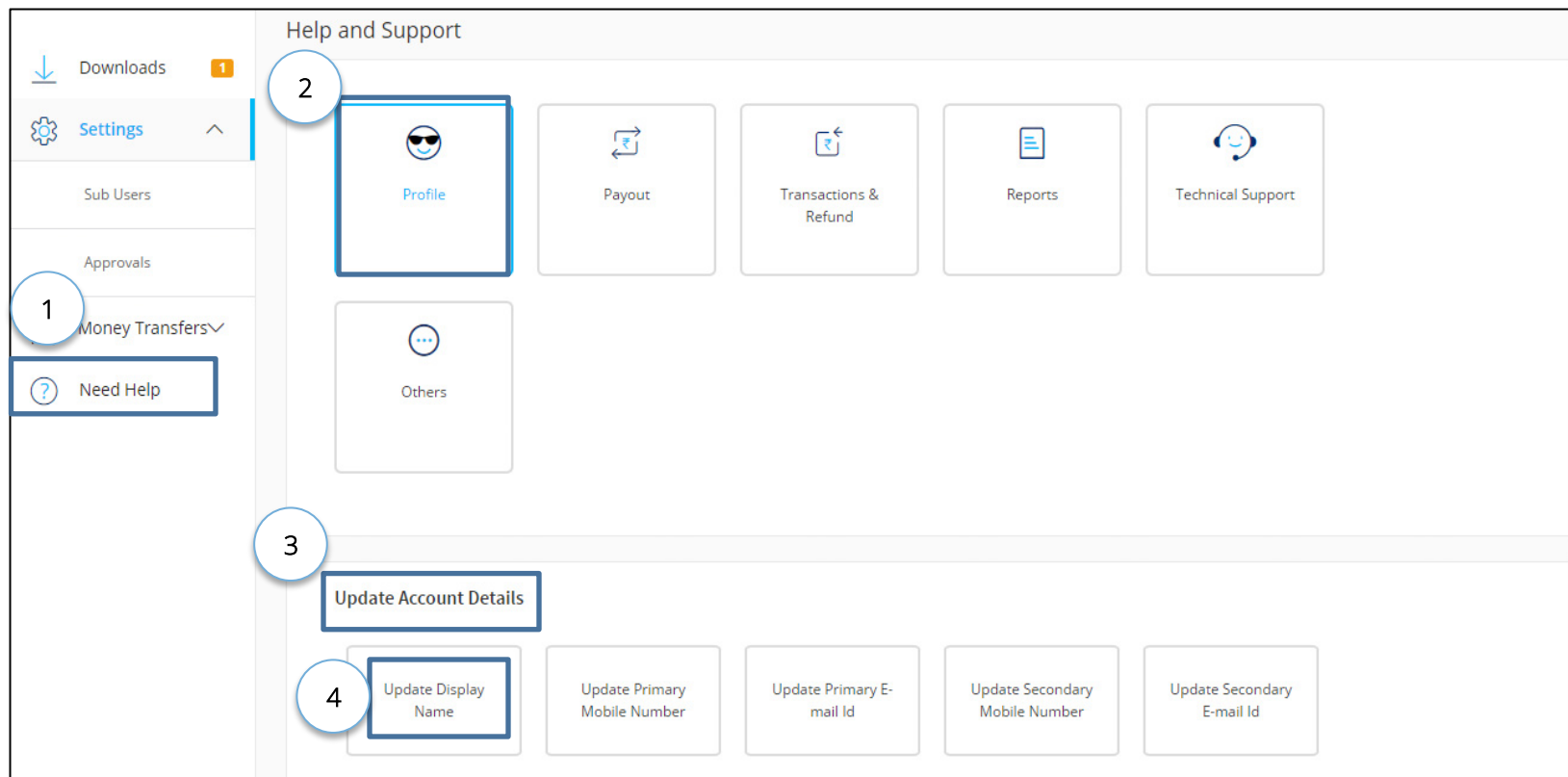**1**   Click on **Downloads**

2   All reports once downloaded will be queued here.

Click on **Download** against the particular request

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"Need Help" section on the panel would allow you to raise tickets for various issues you face

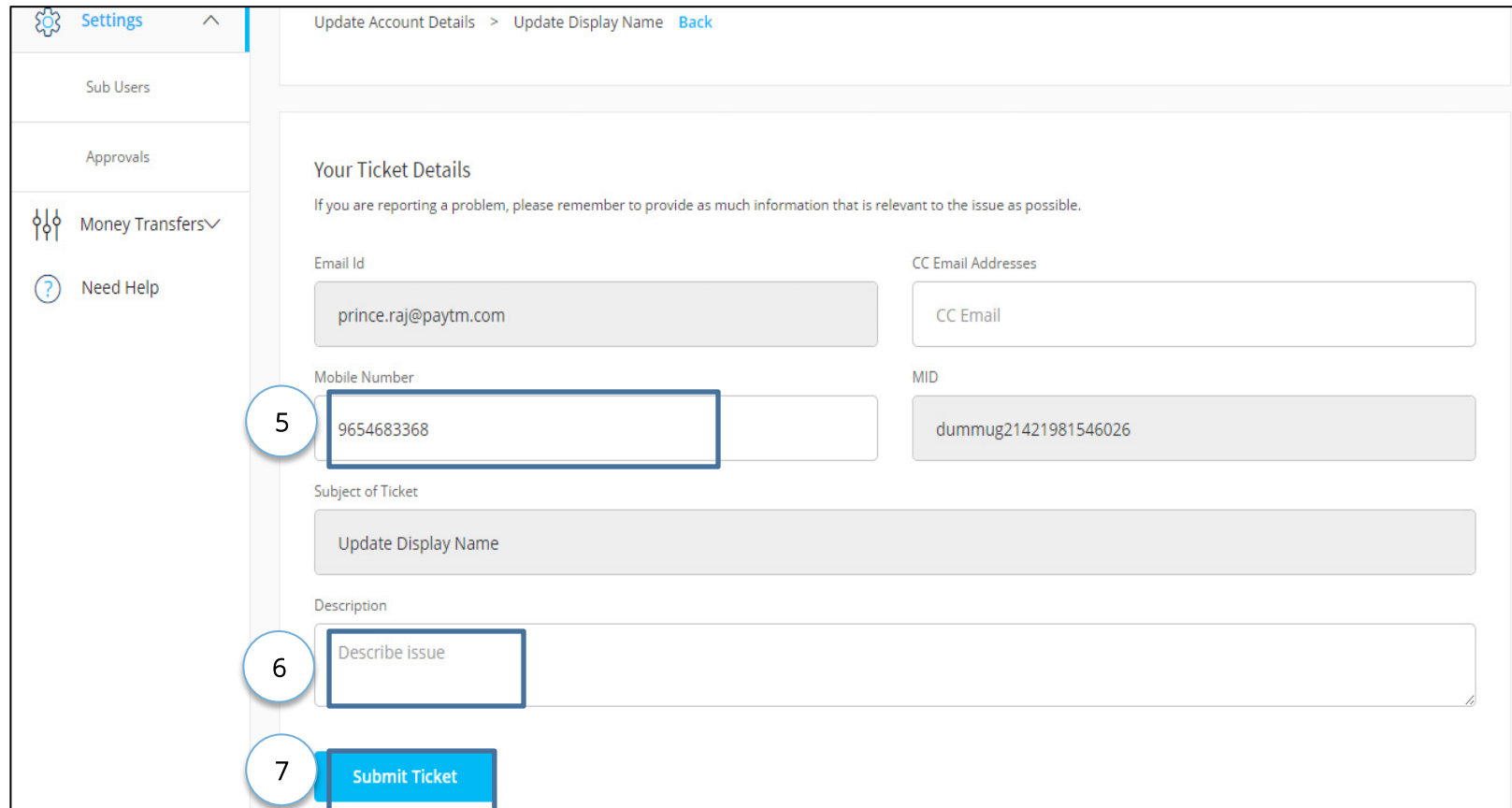As an example How can you raise a ticket to update your display name is shown below

1 Click on **Need Help**

2 Select the category as per your issue, here we have **Selected** Profile

3 **Select** the issue, here we have Update Account Details

4 **Select** the sub issue, here we have selected Update Display Name

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Example – How to raise a ticket to update your display name ?

Settings ⚙ ^

Sub Users

Approvals

Money Transfers ∨

(?) Need Help

Update Account Details > Update Display Name **Back**

Your Ticket Details
If you are reporting a problem, please remember to provide as much information that is relevant to the issue as possible.

Email Id
prince.raj@paytm.com

CC Email Addresses
CC Email

Mobile Number
9654683368

MID
dummug21421981546026

Subject of Ticket
Update Display Name

Description
Describe issue

Submit Ticket

5 Enter the details asked for

6 Mention **description** about the issue.

7 Click on **Submit Ticket**

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Example – How to raise a ticket to update your display name ?

Downloads 1

Settings ^

Sub Users

Approvals

Money Transfers∨

Need Help

8

✔
Thank You
We have received your request
Your ticket has been successfully generated.

Create New

8 You will get get an acknowledgement of your ticket

For further queries please click 'Need Help' on Panel to raise your ticket

Thank you!

Go BIG or Go Home