

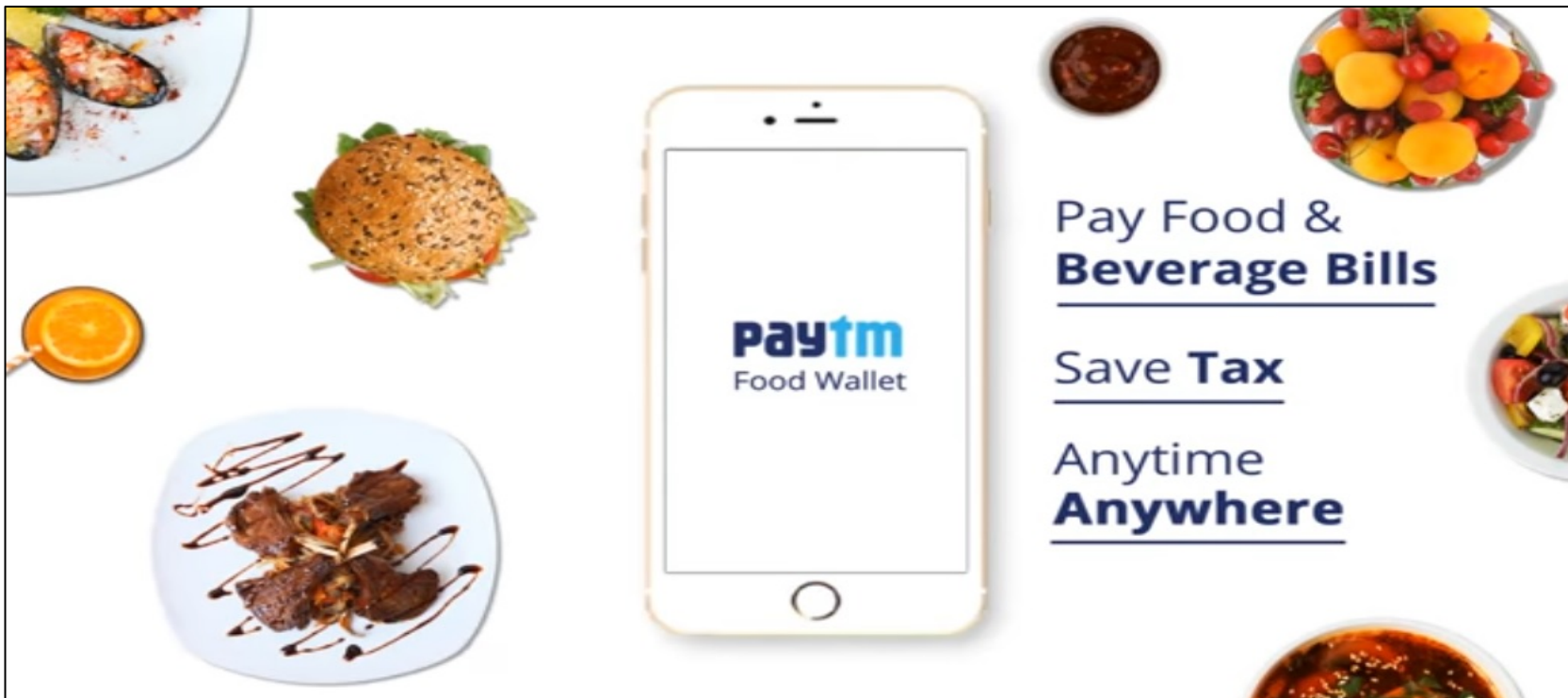
# Food Wallet- Training for merchants

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

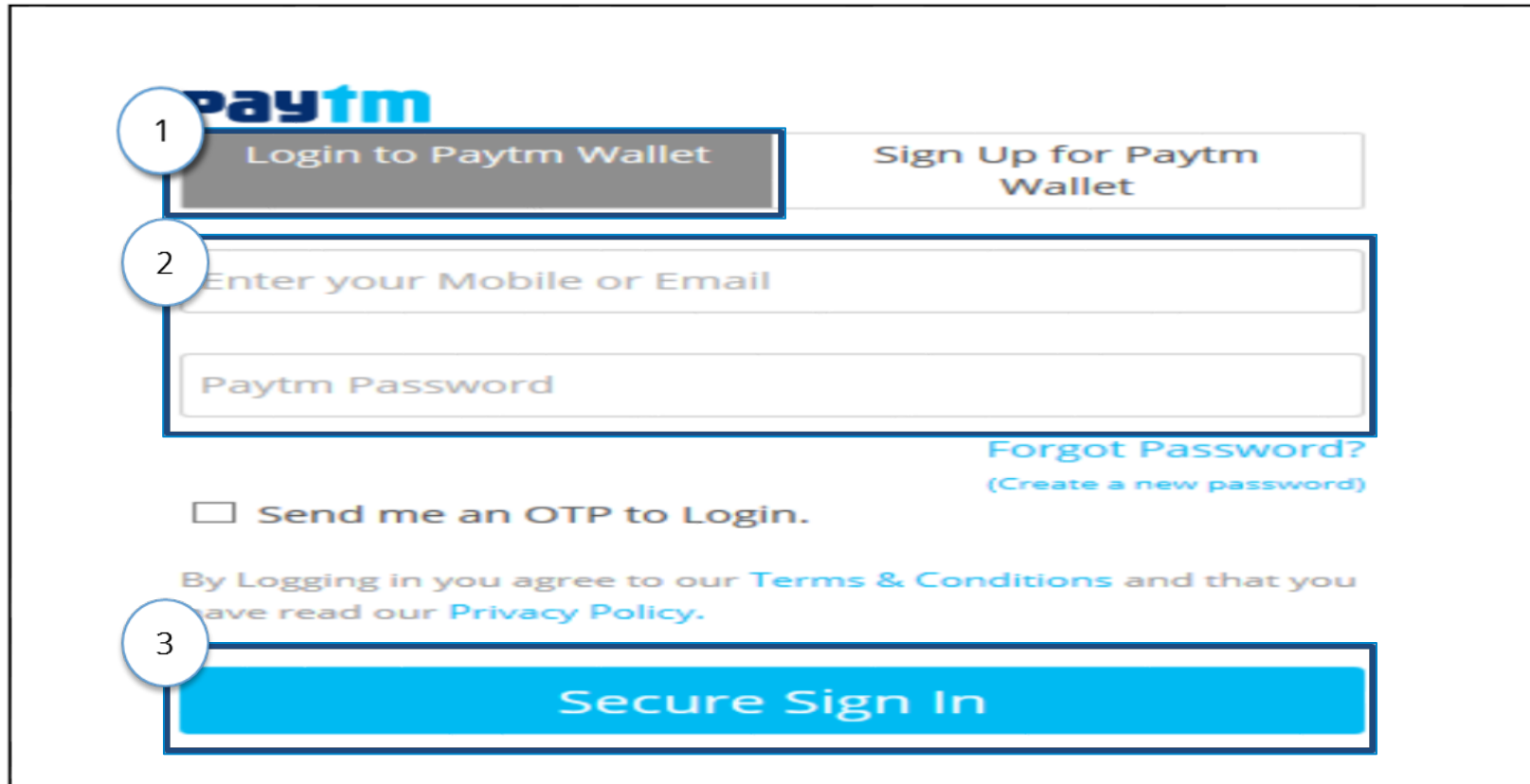
## Food wallet

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



# Login to Merchant panel & access Food Wallet

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



The screenshot shows the Paytm login interface. At the top left is the Paytm logo. Below it are two buttons: 'Login to Paytm Wallet' (highlighted with a blue box and a circle containing the number 1) and 'Sign Up for Paytm Wallet'. Below these buttons are two input fields: 'Enter your Mobile or Email' (highlighted with a blue box and a circle containing the number 2) and 'Paytm Password' (highlighted with a blue box and a circle containing the number 3). To the right of the password field is a link that says 'Forgot Password? (Create a new password)'. Below the input fields is a checkbox labeled 'Send me an OTP to Login.' and a line of text stating 'By Logging in you agree to our Terms & Conditions and that you have read our Privacy Policy.' At the bottom is a large blue button labeled 'Secure Sign In' (highlighted with a blue box and a circle containing the number 3).

1

Click on Log in

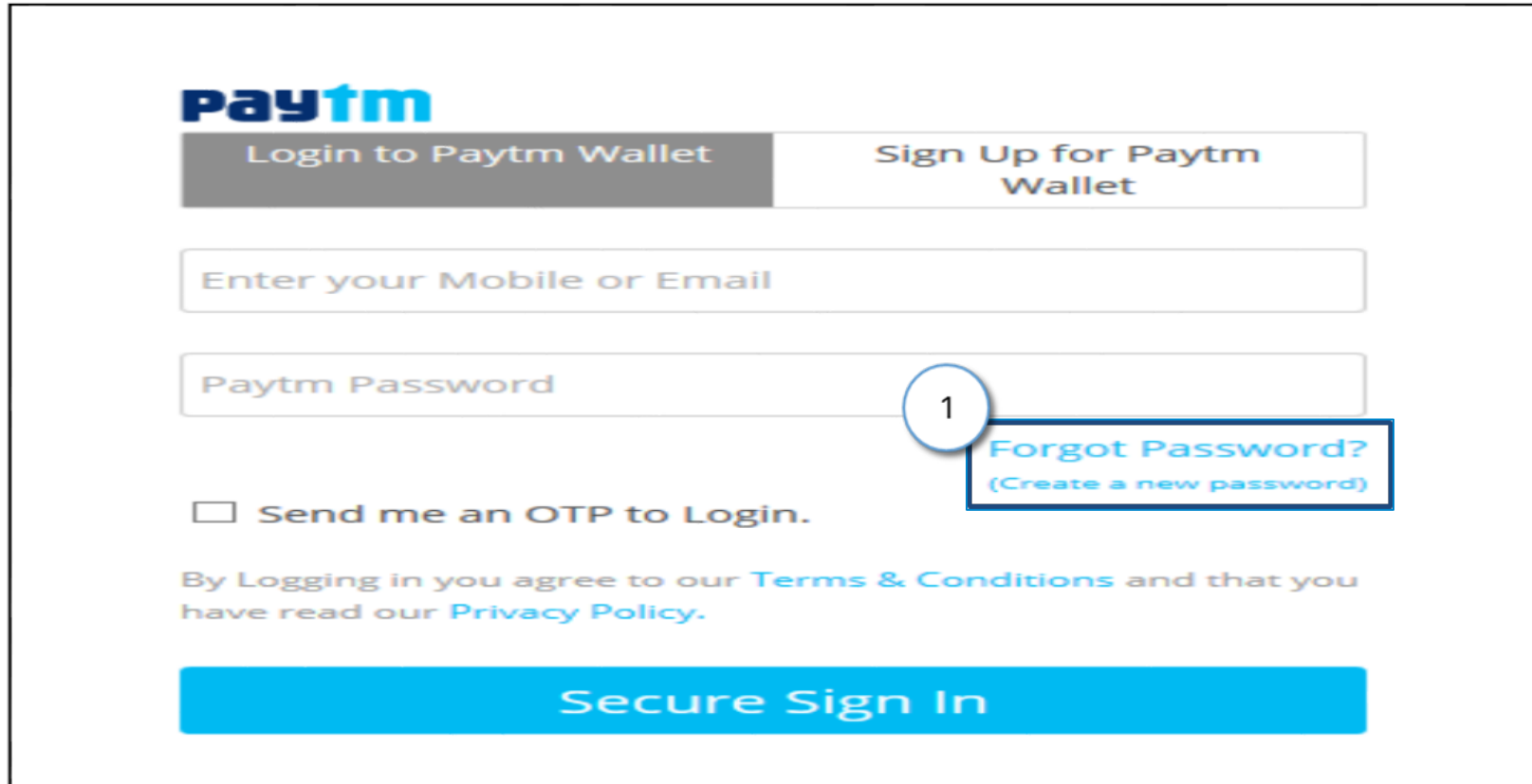
2

Enter your access details

3

Click on Secure Login

# Reset Password



The screenshot shows the Paytm login interface. At the top left is the Paytm logo. Below it are two buttons: 'Login to Paytm Wallet' (dark grey) and 'Sign Up for Paytm Wallet' (white). There are two input fields: 'Enter your Mobile or Email' and 'Paytm Password'. To the right of the password field is a link 'Forgot Password? (Create a new password)' which is highlighted with a blue box and a circled '1'. Below the input fields is a checkbox labeled 'Send me an OTP to Login.'. At the bottom is a large blue button labeled 'Secure Sign In'.

**paytm**

Login to Paytm Wallet Sign Up for Paytm Wallet

Enter your Mobile or Email

Paytm Password

**1** Forgot Password?  
(Create a new password)

☐ Send me an OTP to Login.

By Logging in you agree to our [Terms & Conditions](#) and that you have read our [Privacy Policy](#).

Secure Sign In

1

Click on Forgot Password?

# 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**

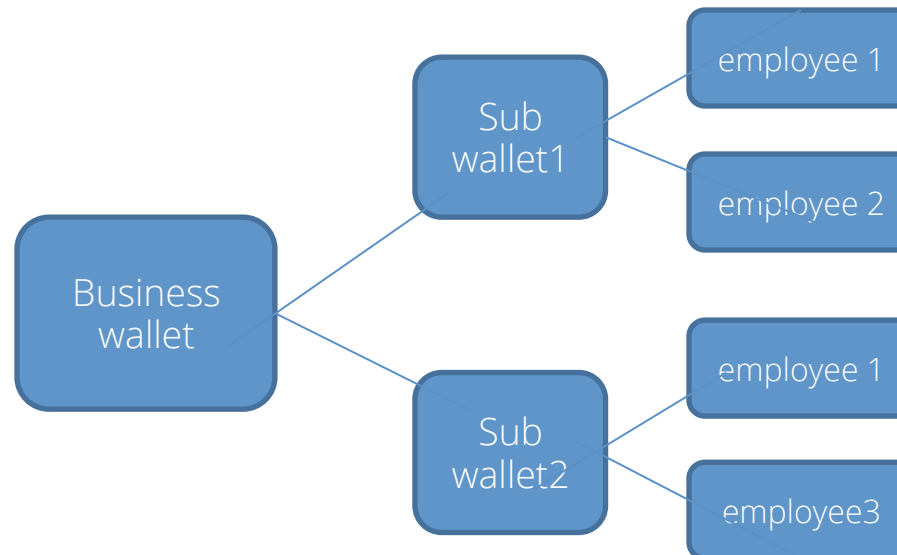
A link will be sent to the registered mobile number / email that will redirect you to changing your password page

## 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



## 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

1

Downloads

1

Settings

Sub Users

Approvals

Money Transfers

Need Help

Sub User Details

2

Add New Sub-User

User Name	Email	Phone	Access granted on	Access Last updated	2 A	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

## Add sub users to the panel – Step 2

Add Sub-User

STEP 1/2

3

Enter Email/Mobile to add Sub-User

999999999

4

Proceed

Cancel

Add Sub-User

STEP 2/2

5

New Sub User

92544116 ✓

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

6

Save User

Cancel

3

Enter email / mobile number  
This can be either Paytm registered or not

4

Click on **Proceed**

5

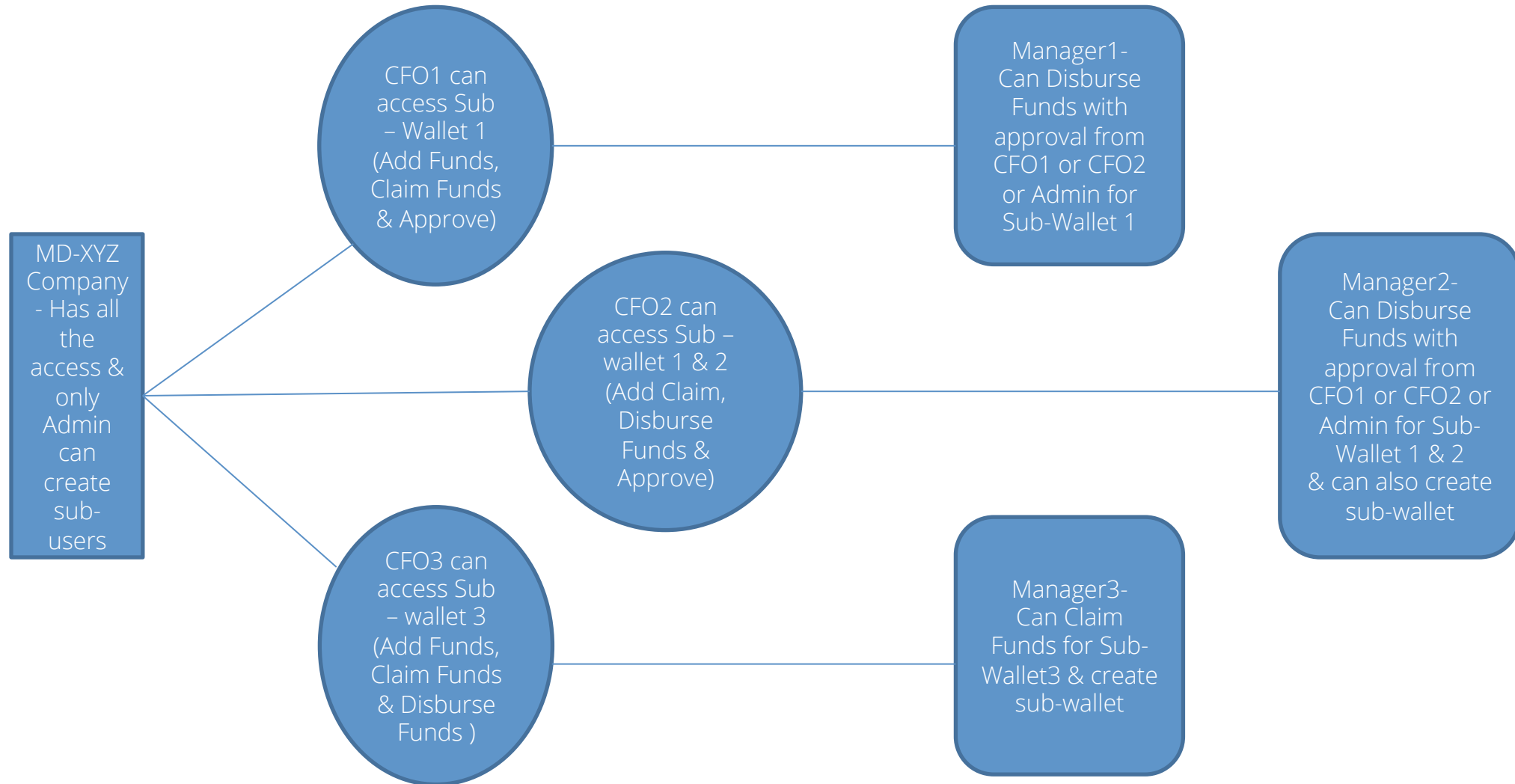
Choose the wallet type and then roles or views that sub user can see

6

Click on **Save user**



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:



## 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

Downloads	Approval Requests			
Settings				
Sub Users				
Approvals				
Money Transfers				
Need Help				
Sr No	File Name	Uploaded by	Sub-Wallet Name	Options
1	Gift_test_12042017.xlsx	prince.raj	Food Wallet Test	Action
2	FoodWalletTest_Prince_03052017.xlsx	prince.raj	Food Wallet Test	APPROVE REJECT DOWNLOAD
3	Food_test_17042017.xlsx	prince.raj	Food Wallet Test	
4	Test_For_iOS.xlsx	prince.raj	Food Wallet Test	Action
5	Test Upload 55.xlsx	rajat.cbs	gratest	Action
6	Test Upload 45.xlsx	keyurd1	keyur4gratification	Action
7	Test Upload 5.xlsx	keyurd1	keyur4gratification	Action
8	Test Upload 4.xlsx	keyurd1	Food Wallet Test	Action
9	Test Upload 1.xlsx	keyurd1	Food Wallet Test	Action

1

Click on **Approvals** under Settings

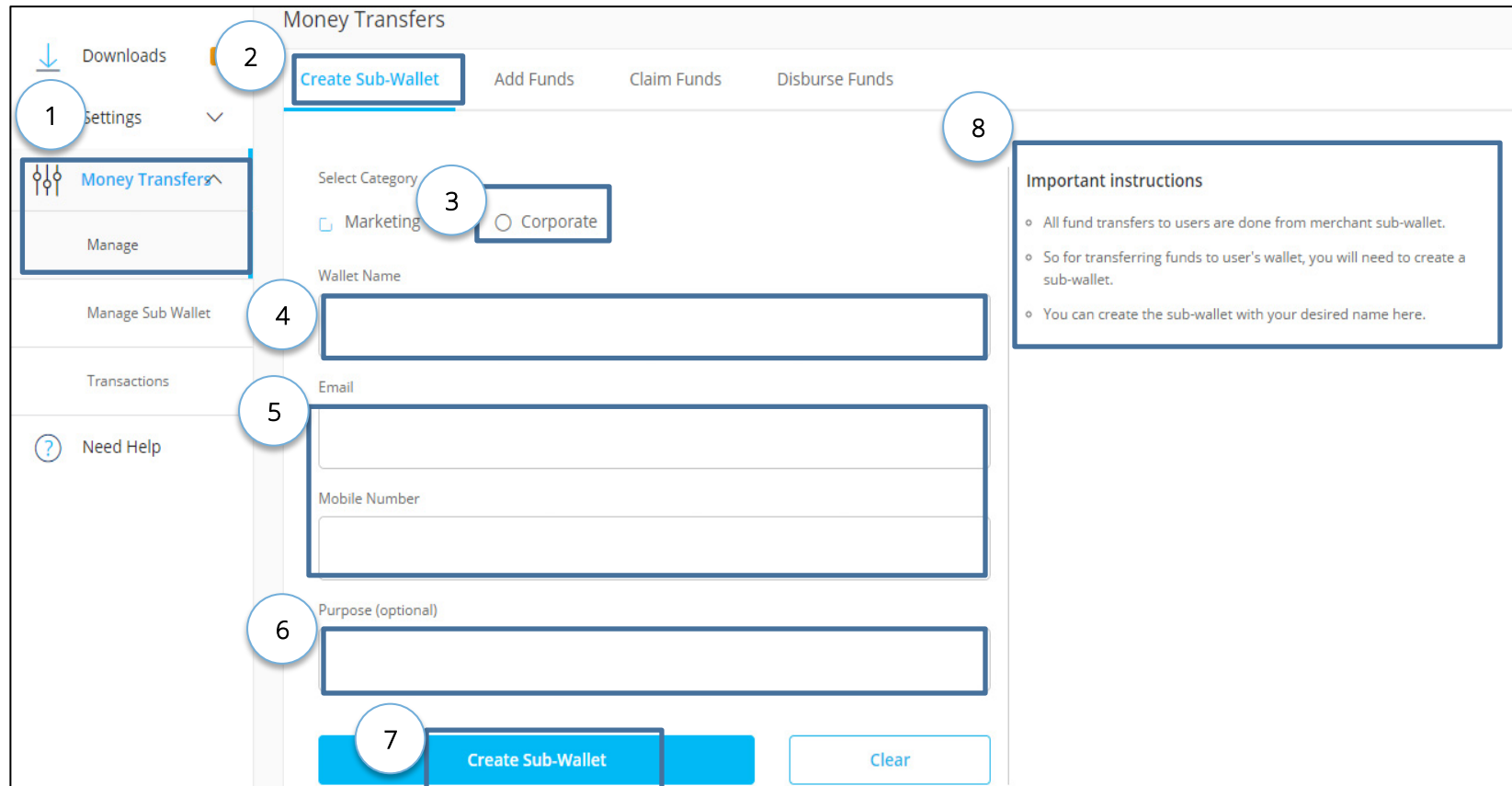
2

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

# Create Sub-Wallet

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



The screenshot shows the 'Money Transfers' section of the Paytm interface. On the left sidebar, 'Money Transfers' is selected (Step 1). The top navigation bar has 'Create Sub-Wallet' highlighted (Step 2). Below the navigation bar, 'Marketing' and 'Corporate' radio buttons are shown, with 'Corporate' selected (Step 3). The form fields include 'Wallet Name' (Step 4), 'Email' (Step 5), 'Mobile Number' (Step 5), and 'Purpose (optional)' (Step 6). At the bottom, the 'Create Sub-Wallet' button is highlighted (Step 7). On the right, a box titled 'Important instructions' (Step 8) contains the following text:

- 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.

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

## Add Money to sub wallet

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

The screenshot shows the Paytm Money Transfer interface. On the left, a sidebar contains 'Downloads', 'Settings', 'Money Transfers' (highlighted with a blue box and step 1), 'Manage', 'Manage Sub Wallet', 'Transactions', and 'Need Help'. The main area is titled 'Money Transfer' and has tabs for 'Create Sub-Wallet', 'Add Funds' (highlighted with a blue box and step 2), 'Claim Funds', and 'Disburse Funds'. Below the tabs, the 'From' field is 'BUSINESS\_WALLET' with a 'Wallet Balance ₹3,875.06'. The 'To' field is a dropdown menu showing 'keyur4gratification' (step 3) with a 'SubWallet Balance ₹ 7.00'. The 'Amount' field contains '7' (step 4). At the bottom, there is a blue 'Transfer' button (step 5) and a 'Clear' button. On the right, a box titled 'Important instructions' (step 6) contains three bullet points: 'For transferring funds to user's sub-wallet, you need to add funds to sub-wallet from which money will be debited.', 'The funds need to be added to desired sub-wallet from your business wallet.', and 'The business wallet need to be pre-funded for this which can be done by raising request to our merchant helpdesk.'

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

## Send money back to Business wallet

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

The screenshot displays the 'Money Transfers' section of the Paytm app. The interface includes a left sidebar with navigation options: Downloads, Settings, Money Transfers (highlighted with a blue box and a circled '1'), Manage Sub Wallet, Transactions, and Need Help. The main content area is titled 'Money Transfers' and features four tabs: 'Create Sub-Wallet', 'Add Funds', 'Claim Funds' (highlighted with a blue box and a circled '2'), and 'Disburse Funds'. Below the tabs, there are two columns. The left column contains a 'From' dropdown menu set to 'Cashback' (circled '3'), a 'To' dropdown menu set to 'BUSINESS\_WALLET', and an 'Amount' input field containing '8' (circled '4'). The right column displays the 'SubWallet Balance ₹ 10.00' and the 'Wallet Balance ₹ 3,905.06'. At the bottom, there is a blue 'Transfer' button (circled '5') and a 'Clear' button. A pop-up box titled 'Important instructions' (circled '6') is visible on the right, containing three bullet points: 'This tab can be used to move amount from your sub-wallet to your bank account.', 'First, move funds to your business wallet from respective sub-wallet.', and 'Once you have the funds in business wallet, raise a request to our merchant helpdesk to move funds to your bank account.'

1

Click on **Money Transfer– Manage**

2

Click on **Claim Funds**

3

Under **From** select Sub-Wallet

4

**Enter** the amount

5

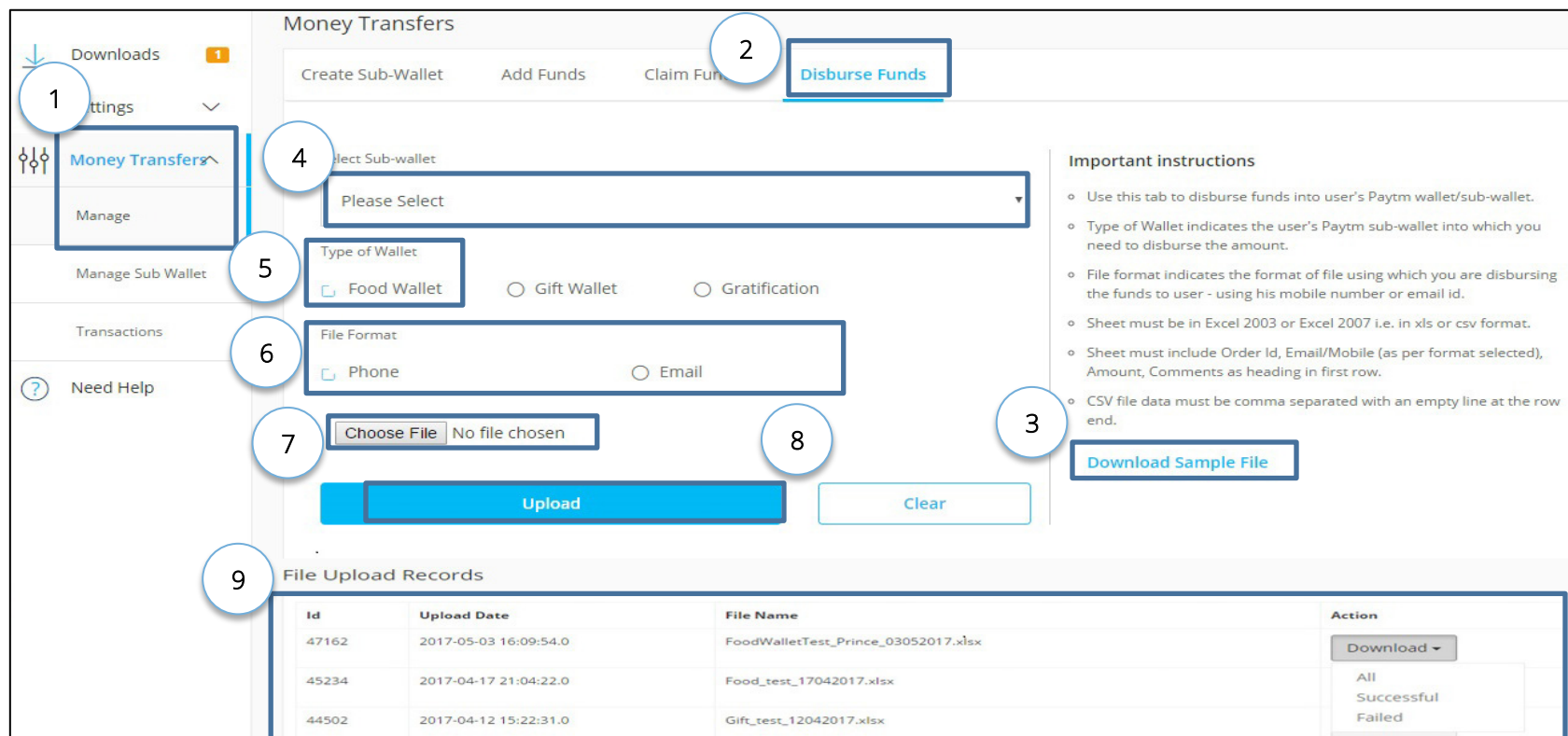
Click on **Transfer**

6

**Read** the instructions

# Disburse Funds

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



The screenshot shows the 'Money Transfers' interface with the following elements and numbered steps:

- 1**: Click on the 'Money Transfers' menu item in the left sidebar.
- 2**: Click on the 'Disburse Funds' button in the top navigation bar.
- 3**: Click on the 'Download Sample File' button in the 'Important instructions' section.
- 4**: Select a sub-wallet from the 'Select Sub-wallet' dropdown menu.
- 5**: Select 'Food Wallet' under the 'Type of Wallet' section.
- 6**: Select 'Phone' or 'Email' under the 'File Format' section.
- 7**: Click on the 'Choose File' button to select a file.
- 8**: Click on the 'Upload' button to upload the file.
- 9**: View the 'File Upload Records' table at the bottom of the page.

**Important instructions:**

- Use this tab to disburse funds into user's Paytm wallet/sub-wallet.
- Type of Wallet indicates the user's Paytm sub-wallet into which you need to disburse the amount.
- File format indicates the format of file using which you are disbursing the funds to user - using his mobile number or email id.
- Sheet must be in Excel 2003 or Excel 2007 i.e. in xls or csv format.
- Sheet must include Order Id, Email/Mobile (as per format selected), Amount, Comments as heading in first row.
- CSV file data must be comma separated with an empty line at the row end.

Id	Upload Date	File Name	Action
47162	2017-05-03 16:09:54.0	FoodWalletTest_Prince_03052017.xlsx	Download
45234	2017-04-17 21:04:22.0	Food_test_17042017.xlsx	All
44502	2017-04-12 15:22:31.0	Gift_test_12042017.xlsx	Successful
			Failed

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

## 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

Sub Wallet Details

Sub-Wallet	Checker		Action
	Enabled	Mode	
<a href="#">342453</a>	✓	ALL	<a href="#">Edit</a>
<a href="#">53rtf</a>	✓	ALL	<a href="#">Edit</a>
<a href="#">Cashback</a>	✓	ALL	<a href="#">Edit</a>
<a href="#">Demo Cashback</a>	✓	ALL	<a href="#">Edit</a>
<a href="#">Diwali Gift</a>	✓	ALL	<a href="#">Edit</a>
<a href="#">Dummy Cashback</a>	✓	ALL	<a href="#">Edit</a>
<a href="#">Dummytest Cashback</a>	✗	ALL	<a href="#">Edit</a>
<a href="#">Food Wallet Test</a>	✓	SINGLE	<a href="#">Edit</a>
<a href="#">Garima</a>	✗	ALL	<a href="#">Edit</a>
<a href="#">gratest</a>	✓	ALL	<a href="#">Edit</a>

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



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

**Cashback**

User Mappings

4 ☒ Secondary Verification

5 Select Checker Mode  
☒ ALL ☐ SINGLE

UserName	Roles	Usage Access	Verification Access
917838040955	ROLE_GRATIFICATION , ROLE_SUBWALLET_APPROVE ,	<input type="checkbox"/>	<input checked="" type="checkbox"/>
keyurd1	ROLE_FOOD , ROLE_GRATIFICATION , ROLE_SUBWALLET_ADDFUND , ROLE_SUBWALLET_CREATE , ROLE SUBWALLET DISBURSE ,	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Prerna Kalra	ROLE_GRATIFICATION , ROLE_SUBWALLET_APPROVE ,	<input type="checkbox"/>	<input checked="" type="checkbox"/>

8

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



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

**Cashback**  
User Mappings

☒ Secondary Verification

Select Checker Mode

☐ ALL ☒ SINGLE

UserName	Roles	Usage Access	Verification Access
917838040955	ROLE_GRATIFICATION , ROLE_SUBWALLET_APPROVE ,	<input type="checkbox"/>	<input checked="" type="checkbox"/>
keyurd1	ROLE_FOOD , ROLE_GRATIFICATION , ROLE_SUBWALLET_ADDFUND , ROLE_SUBWALLET_CREATE , ROLE_SUBWALLET_DISBURSE ,	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Prerna Kalra	ROLE_GRATIFICATION , ROLE_SUBWALLET_APPROVE ,	<input type="checkbox"/>	<input type="checkbox"/>

**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

# Transaction Report

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

The screenshot shows the 'Transaction Report' interface. On the left is a sidebar with navigation options: Downloads, Settings, Money Transfers (highlighted), Manage, Manage Sub Wallet, Transactions (highlighted), and Need Help. The main area contains filters for 'Search By' (a dropdown menu with 'Please Select'), 'From Date' (25/04/2017), and 'To Date' (26/04/2017). Below these is a 'Transaction type' dropdown menu with 'Select'. At the bottom of the filter section are 'Search' and 'Reset' buttons. A 'Download' button is located to the right of the 'Search' button. Below the filters is a table with transaction data.

Txn Date	Txn ID	Order ID	Reference ID	Txn Amount	Txn Type	Txn Status	Pos Id
2017-01-29	6124347290	123411		1.0	SALES_TO_USER_CREDIT	SUCCESS	

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

## 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

The screenshot shows the 'Downloads' section of the Paytm interface. On the left is a sidebar with navigation options: Downloads (highlighted with a blue box and a circled '1'), Settings, Sub Users, Approvals, Money Transfers, and Need Help. The main area displays a table with the following data:

Created On	File Type	Status
2017-05-04 11:55:01.0	Disbursement Report	Download (highlighted with a blue box and a circled '2')

1

Click on **Downloads**

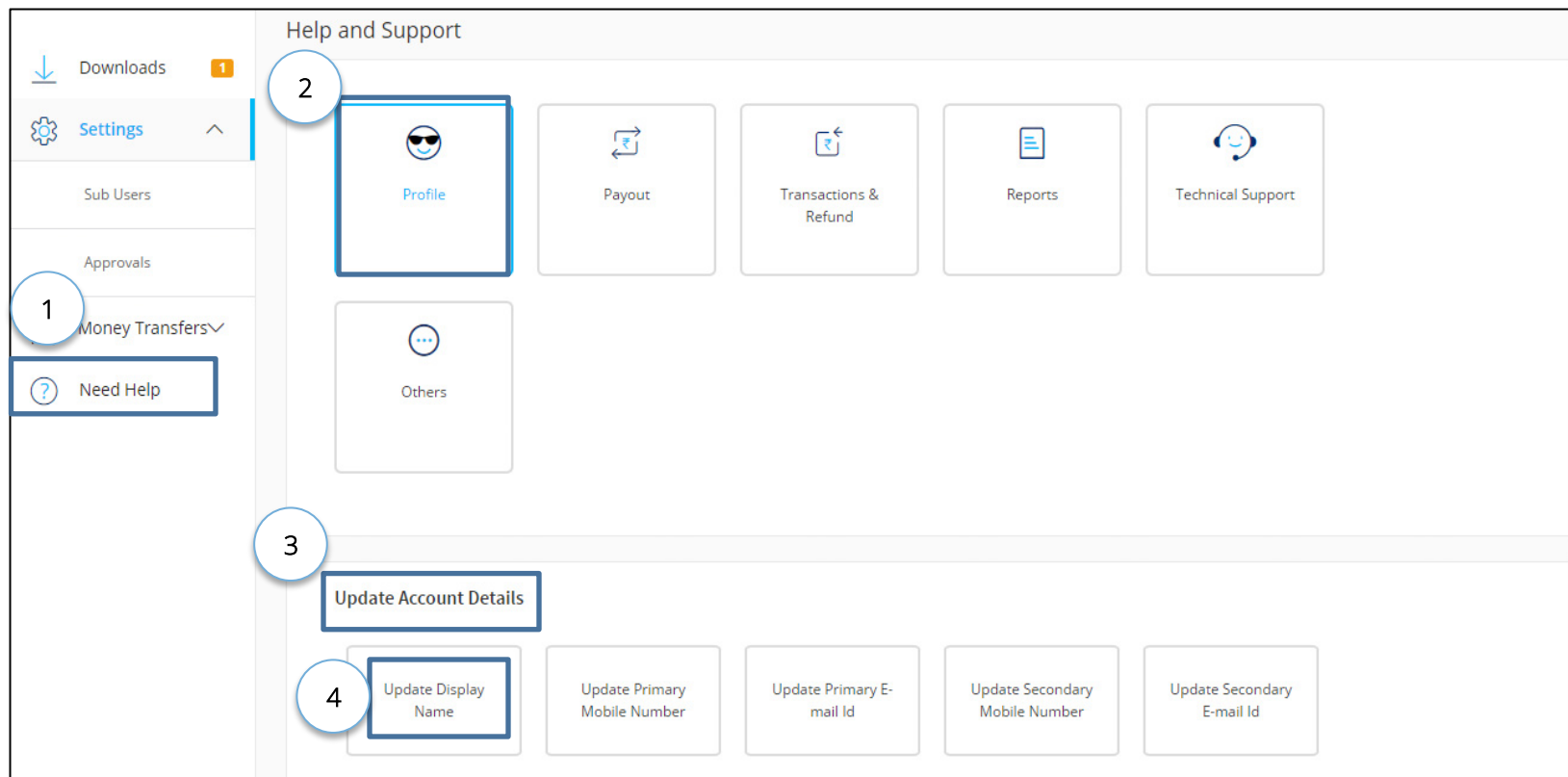
2

All reports once downloaded will be queued here.

Click on **Download** against the particular request

## “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



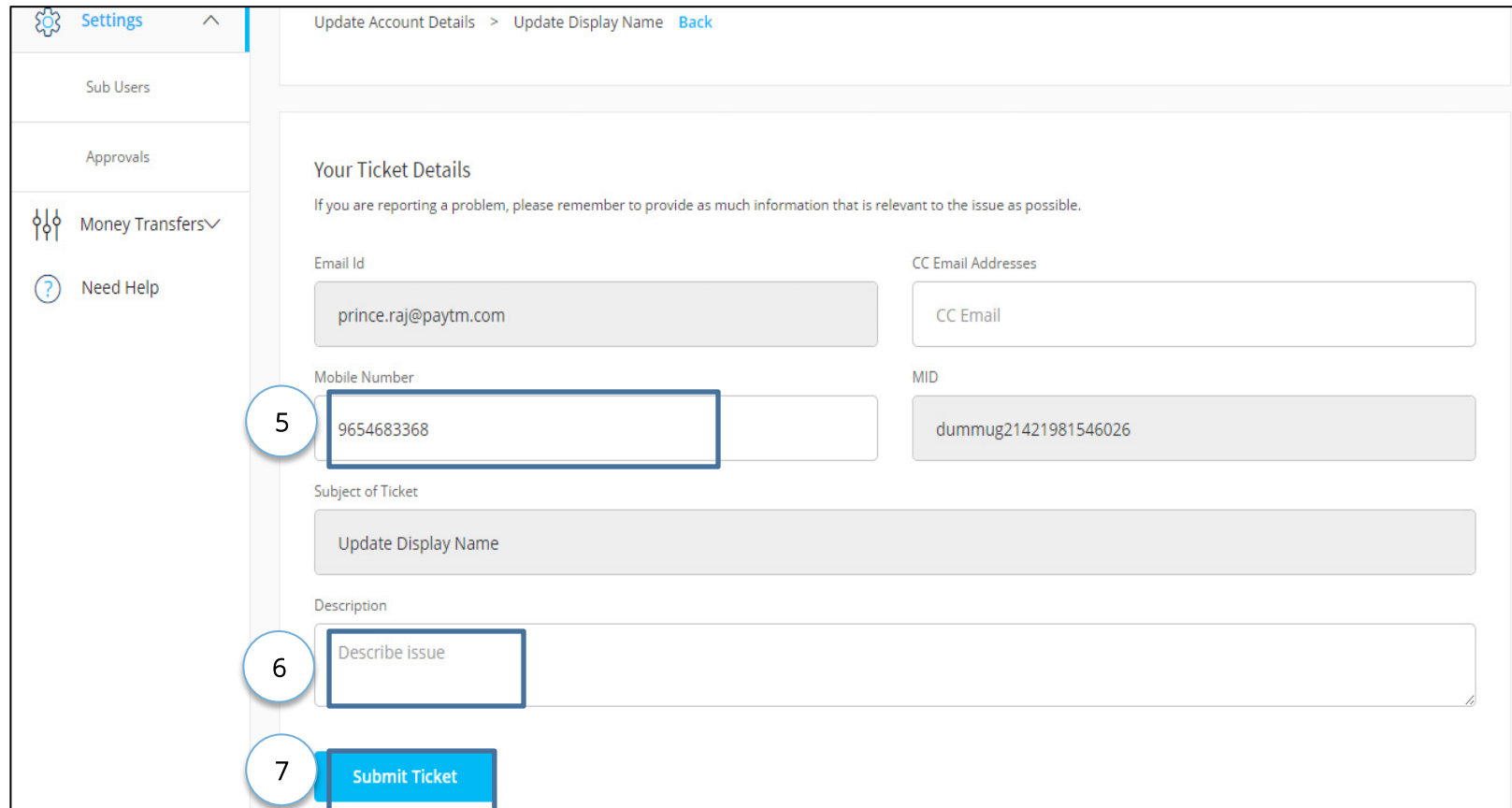
**1** Click on Need Help

**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

## 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**

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

The screenshot shows the Paytm dashboard interface. On the left is a sidebar menu with options: Downloads (with a download icon and a badge '1'), Settings (with a gear icon and an upward arrow), Sub Users, Approvals, Money Transfers (with a double-slash icon and a dropdown arrow), and Need Help (with a question mark icon). The main content area is light gray. In the center, there is a white box with a green checkmark icon at the top. Below the icon, the text reads: 'Thank You', 'We have received your request', and 'Your ticket has been successfully generated.' Below this text is a blue button labeled 'Create New'. A blue circle with the number '8' is positioned to the left of the success message box.

8

You will get an acknowledgement of your ticket

For further queries please click '[Need Help](#)' on Panel to raise your ticket

Thank you!

A graphic with the text "GO BIG OR GO HOME" in a bold, black, hand-drawn style. The word "BIG" is the largest and most prominent, with a thick horizontal line drawn through it. The words "GO" and "OR" are smaller and positioned around "BIG". The words "GO HOME" are at the bottom, with "GO" in a smaller font and "HOME" in a larger font. The entire graphic has a rough, sketched appearance.