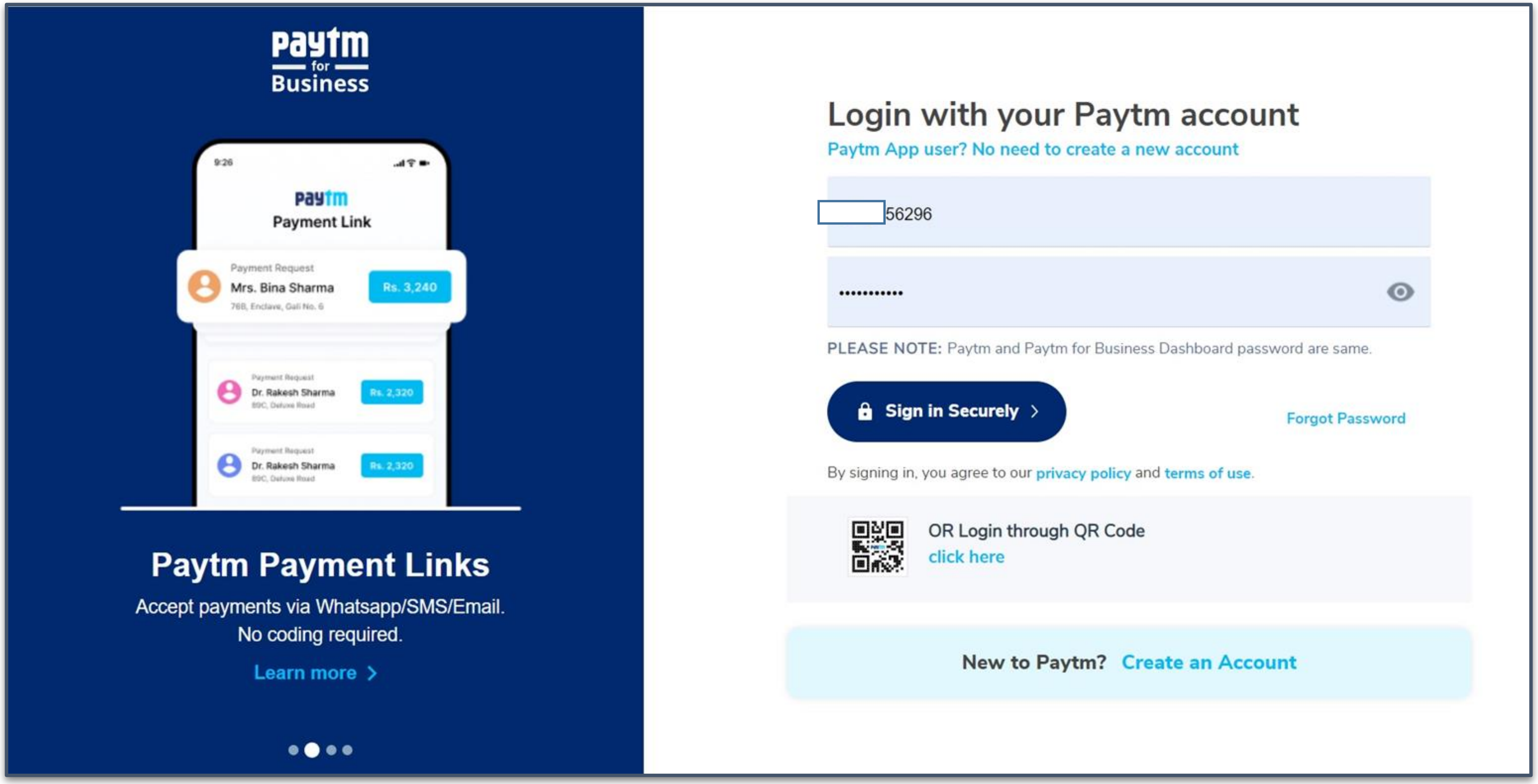
UMP/Merchant Dashboard Guide

Content

How to login to UMP Dashboard

Step1: Login to dashboard.paytm.com
Step 2: Enter your registered mobile number/email ID with Paytm consumer app password under respective field.



If you are not able to login, check the following details:

- If your email ID/Mobile number is not registered with Paytm

  Please reach out to Helpdesk team to get access the password reset link email.

- If your email ID/mobile number registered with Paytm:

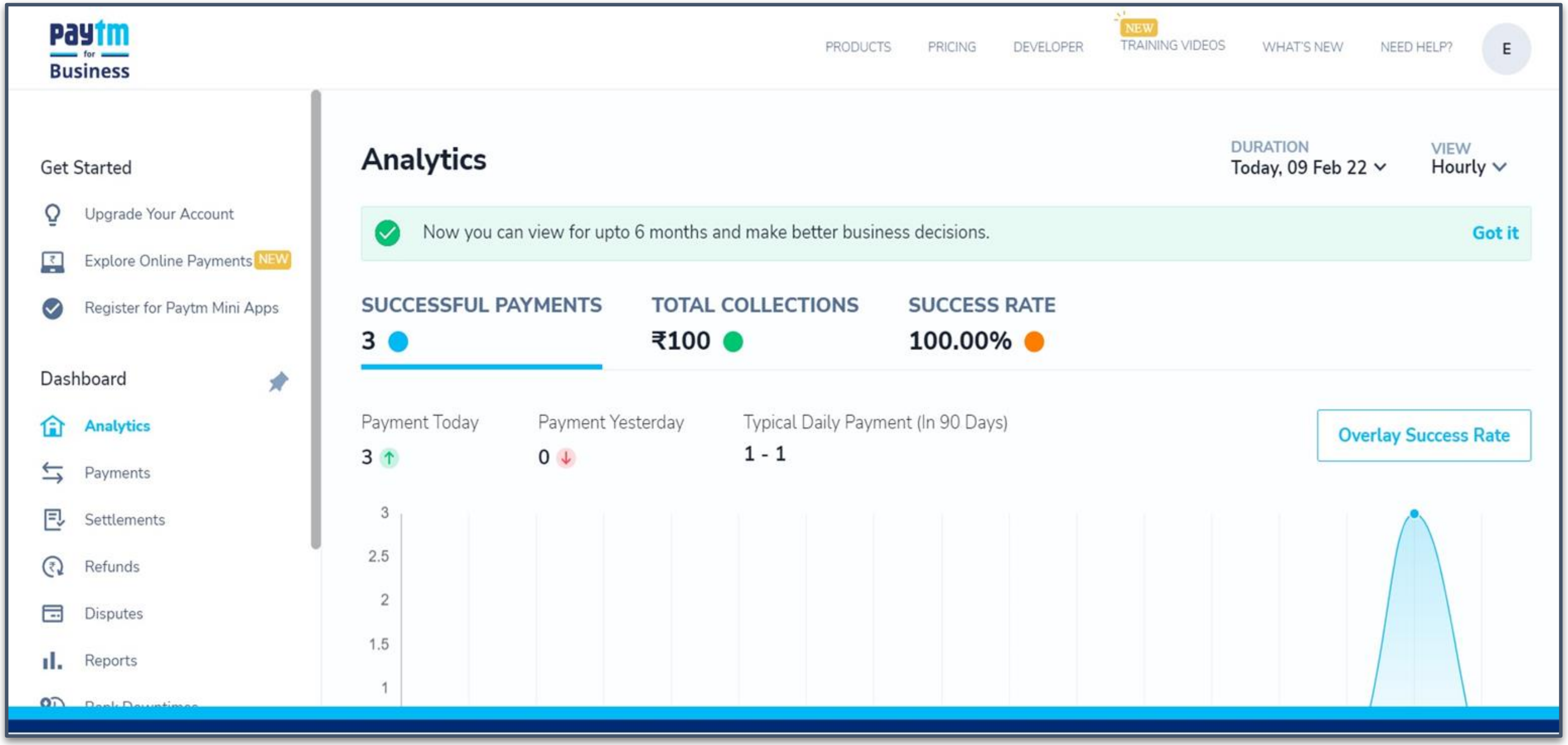
  Please click on forgot password option to reset the password.

How to reset password

- From mobile number: Call on 120-4888488 with your Paytm registered number, select preferred language and press 1 to reset the password
- From Email ID: Please click on the option of “click here” to reset the password

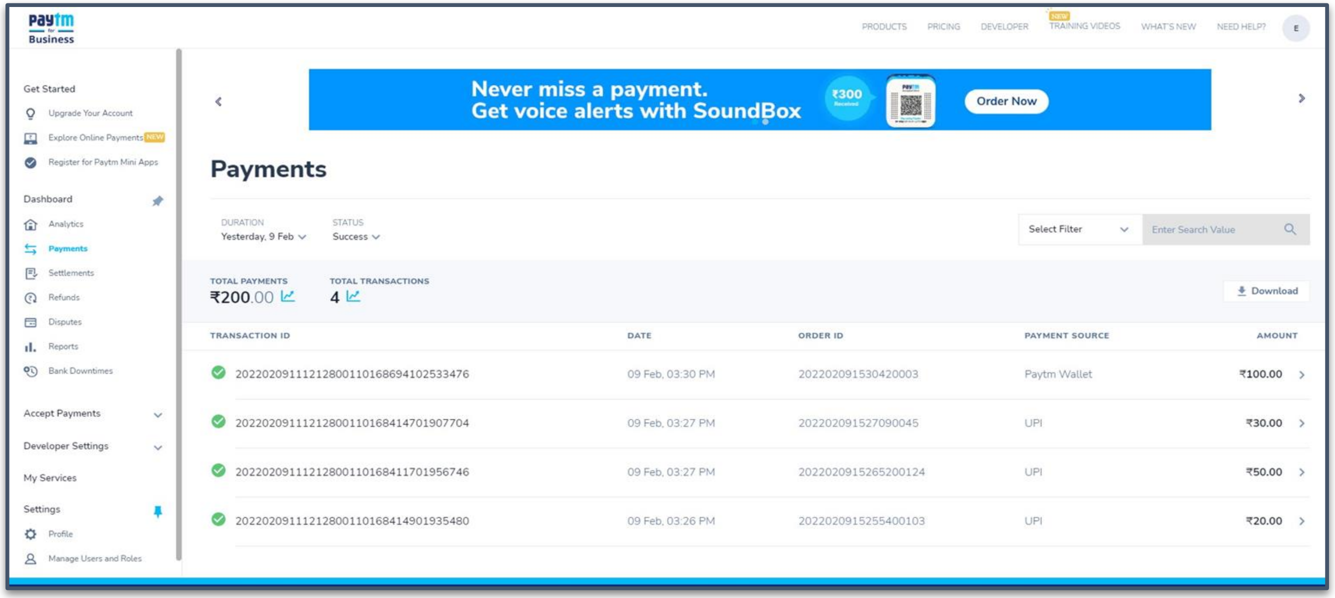
Analytics Tab

- You can see the number of payments and total amount of payments received during the selected date/time range.
- It helps you track business trends and helps you stay abreast with your business with us.
- You can see payment flow analysis and success rate that will help you to identify which bank/pay-mode is providing best success rate.

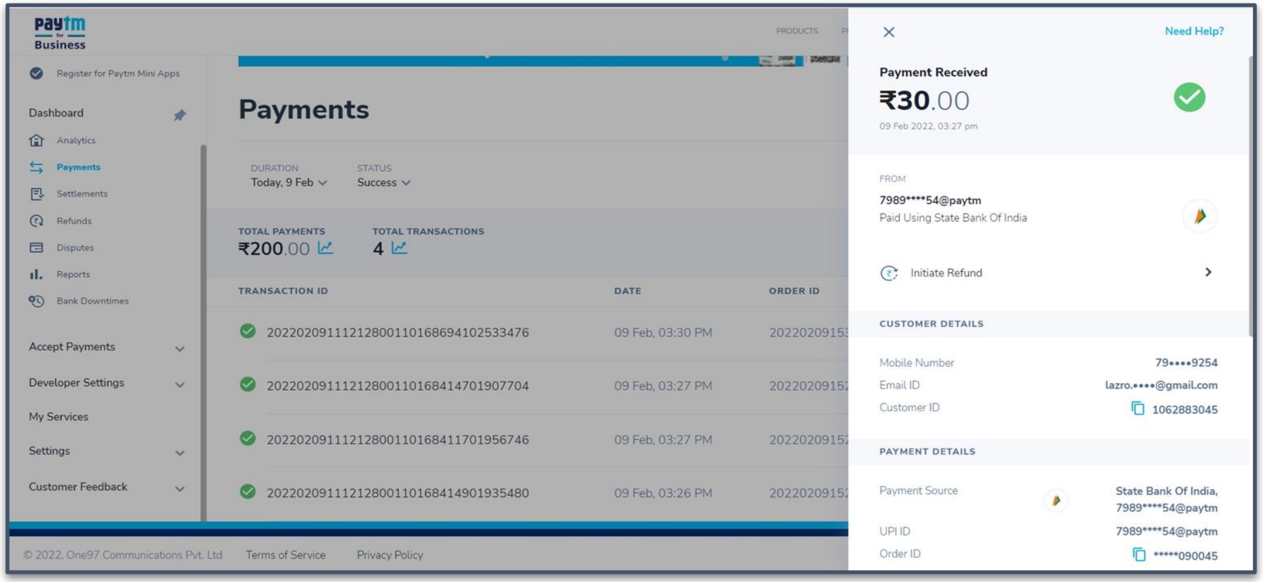


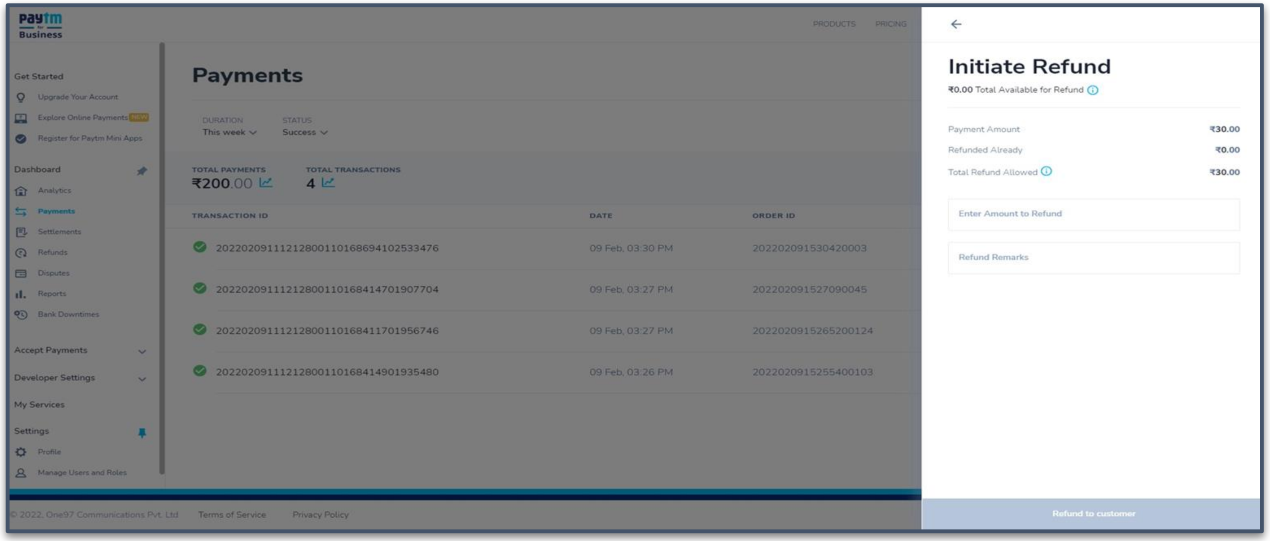
Payments Tab

- Under this tab you can see total payments received for the selected period.
- You can see the transactions with the help of Amount, Transaction ID and Order ID.
- You can change the status of transaction from here to track details of Pending and Failed transaction.
- You can filter transaction details based on customer Phone no/Email ID, Transaction ID, Order ID, etc.
- You can initiate the refund by clicking on a particular transaction and refund details can be tracked under Refund tab.



Steps to initiate Refund from Payments tab

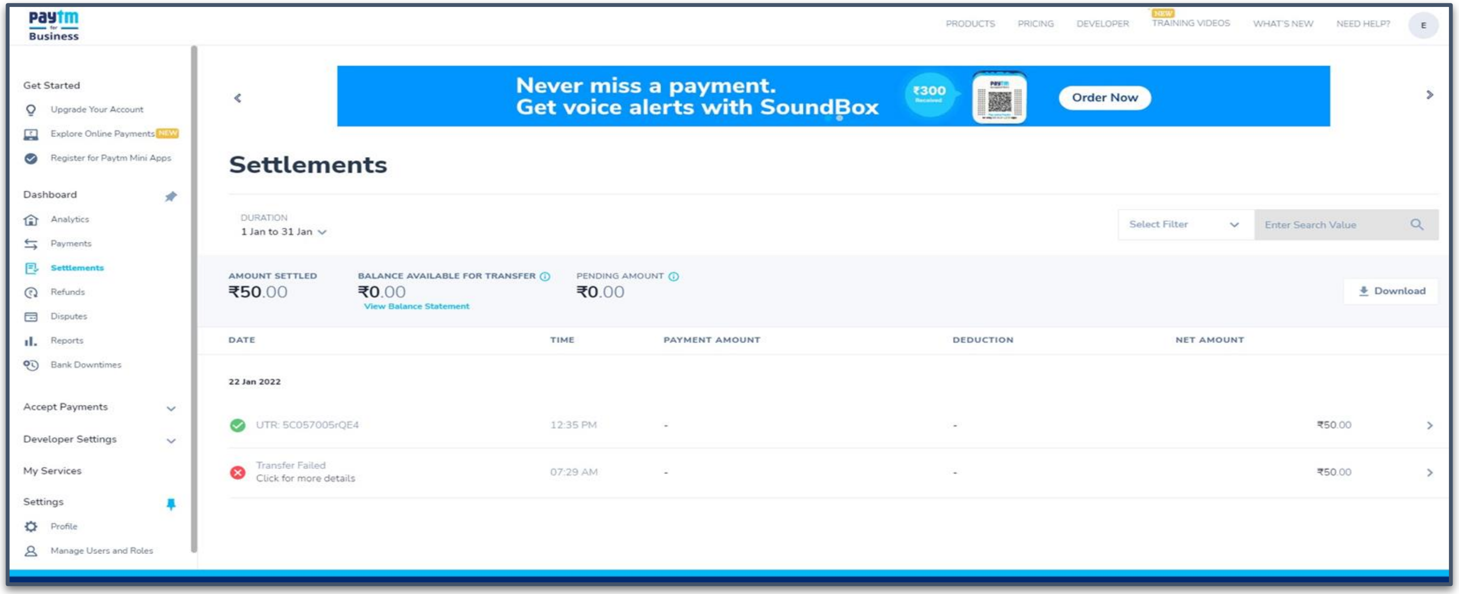




- **Step 1:** Select the transaction you wish to refund.
- **Step 2:** Click on ‘Initiate refund’
- **Step 3:** Total refundable amount will be visible on the top
- **Step 4:** Enter refund amount
- **Step 5:** Enter refund remarks for tracking (optional)
- **Step 6:** Click on ‘Refund to customer’ on bottom

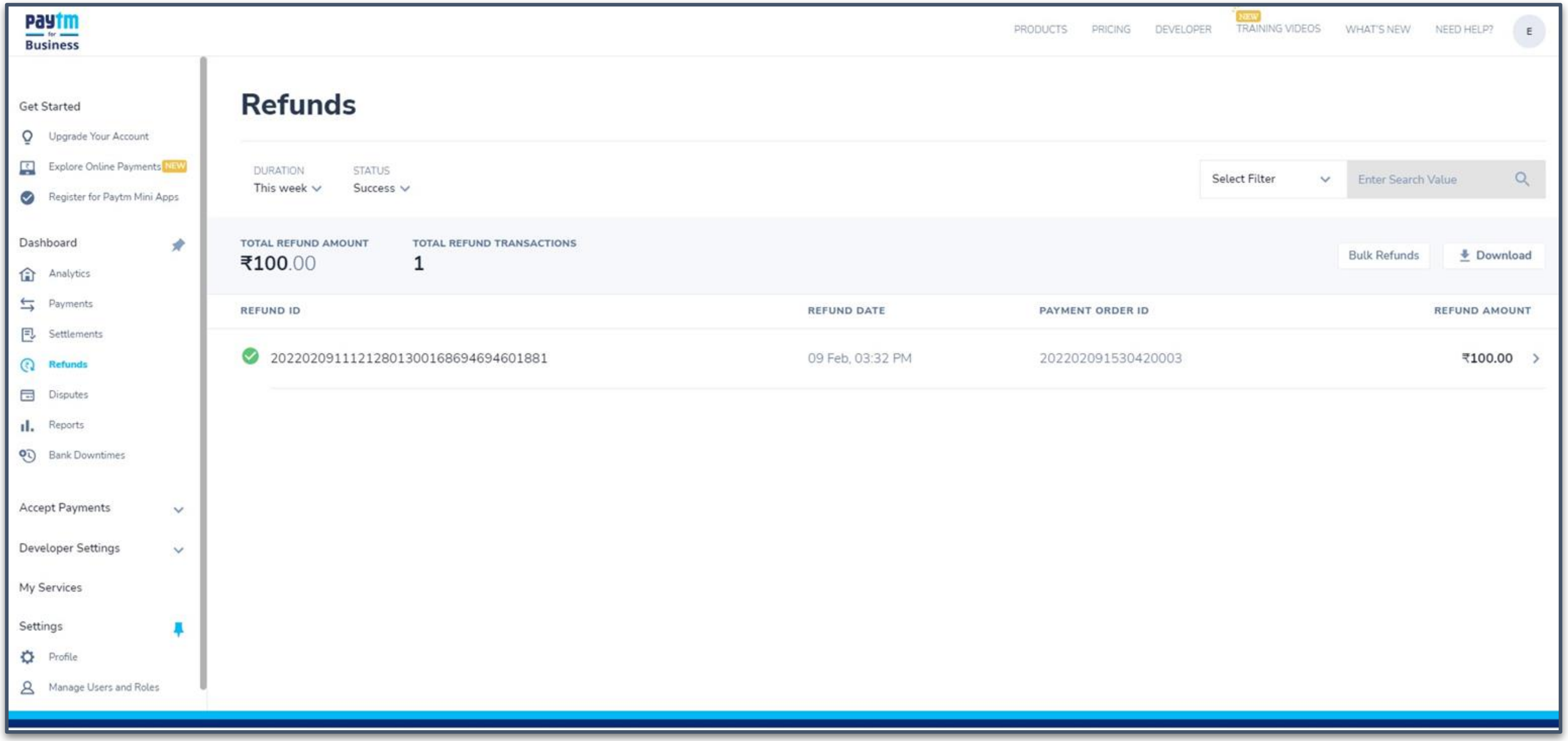
Settlements Tab

- All the settled amount of selected date/time range will be visible here along with UTR number.
- You can see the settlement from Today, Yesterday, This week and Custom range by using 'Select filter' option on top right.
- You can search a particular settlement details from UTR number.
- Pending settlement amount for selected date/time range will also be visible here.
- Click on a particular settlement to see the details.
- You can download the settlement report by clicking on the icon of 'Download'.



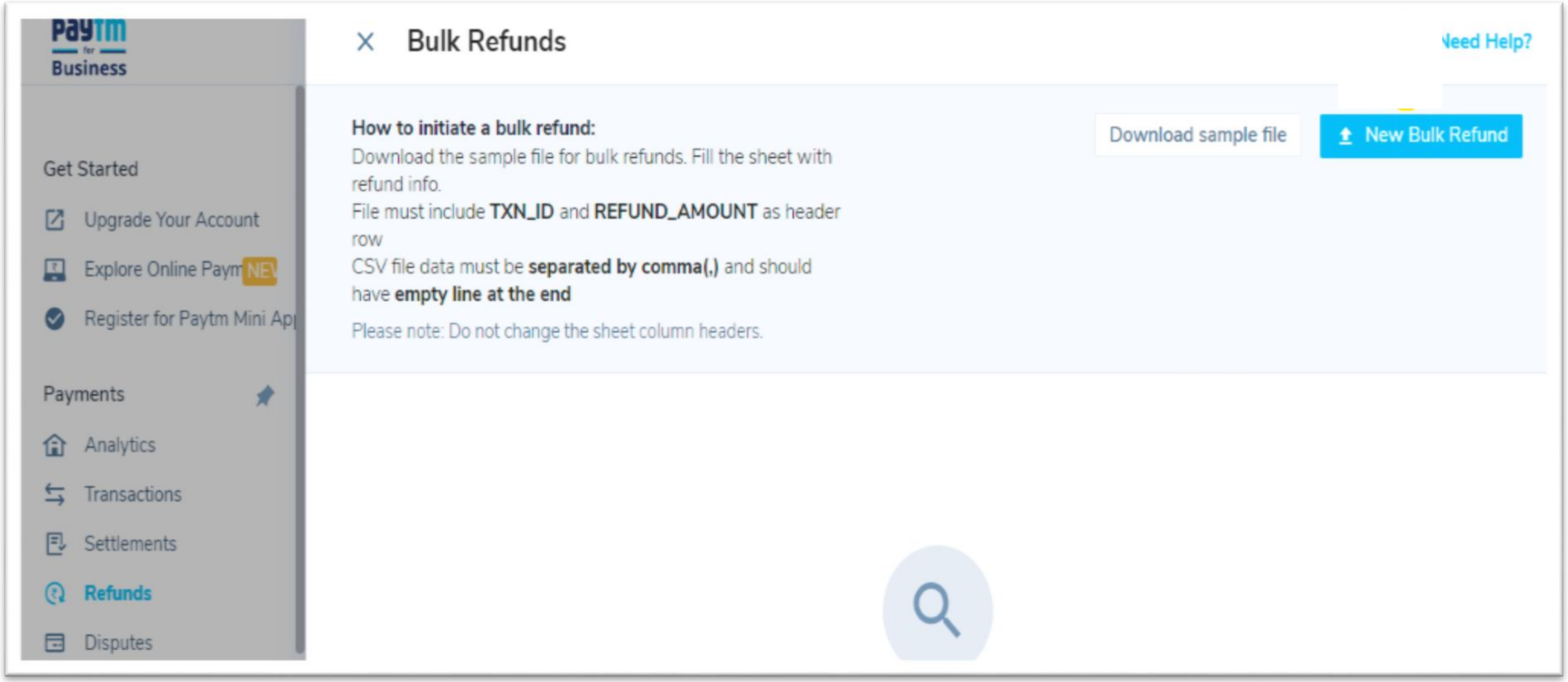
Refunds Tab

- Total refund amount and number of refund for selected period will be visible here.
- You can filter the refund details by Duration- Today, Yesterday, This week and Custom range.
- You can also filter refund from here based on customer phone no, email ID, transaction ID, order ID, etc.



Steps to initiate Bulk Refund

Step 1: Click on bulk refund to see the process.
Step 2: Download the sample file for bulk refunds and fill the sheet with refund information.
Step 3: Upload the file by clicking on 'New bulk refund'.



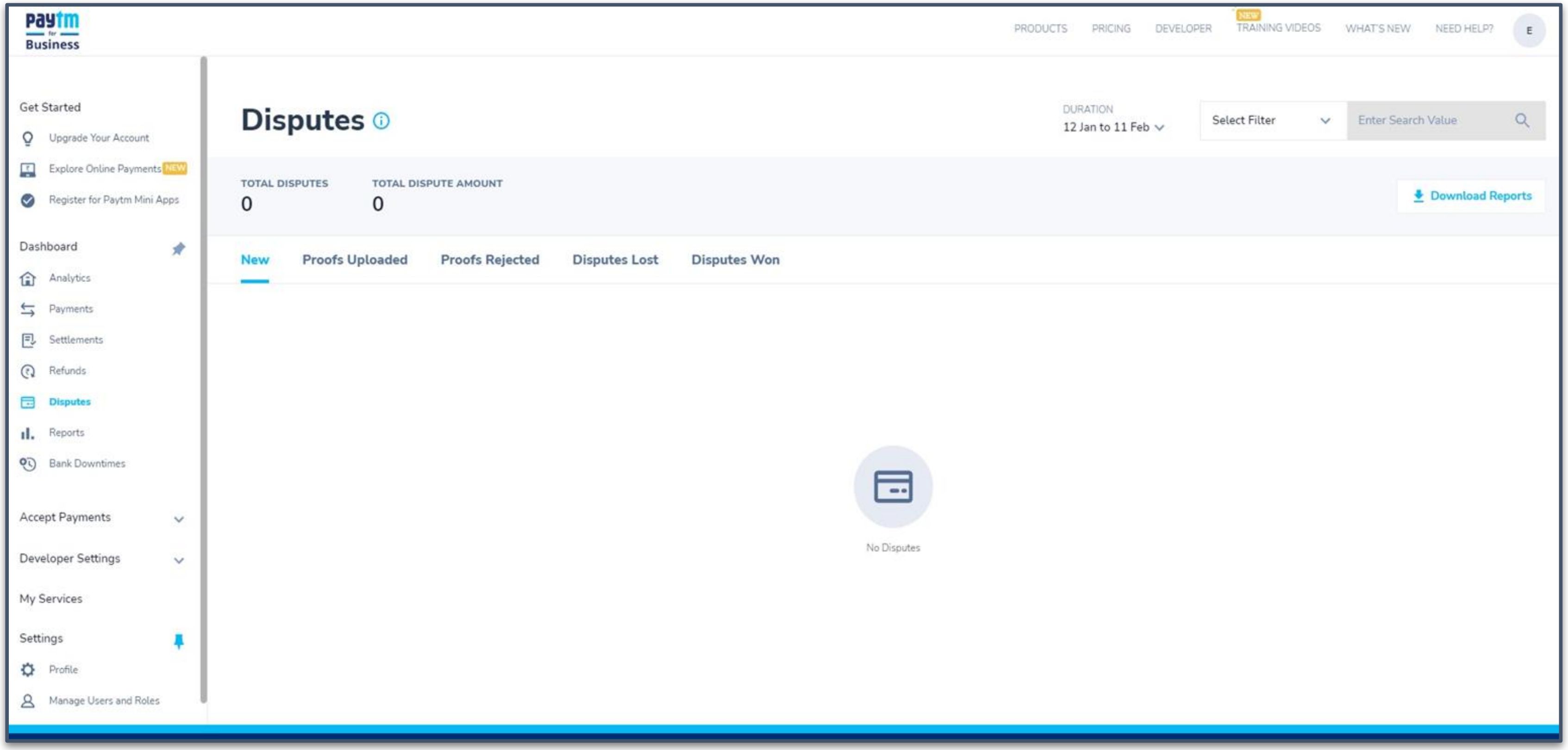
Disputes Tab

Dispute (also known as chargeback) is a disagreement against a particular transaction initiated by the end of consumer, who has paid for the product or service.

Step 1: Click on Dispute lost to check the disputed transaction and it's details.

Step 2: Click on Respond to proceed further.

Step 3: Upload the documents to clear the disputed transaction.

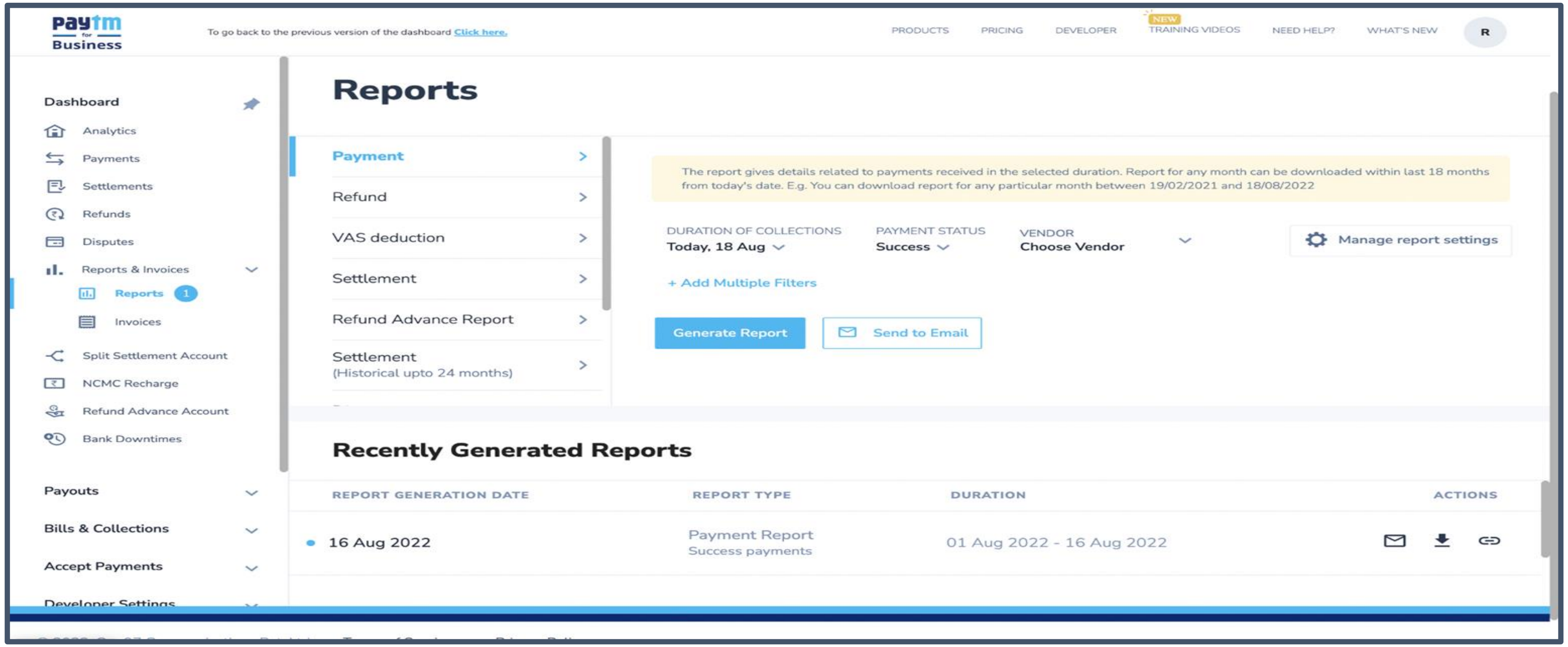


Reports Tab

Under this tab you can see and download multiple reports - Transaction, Refund, Settlement, Dispute report, etc.

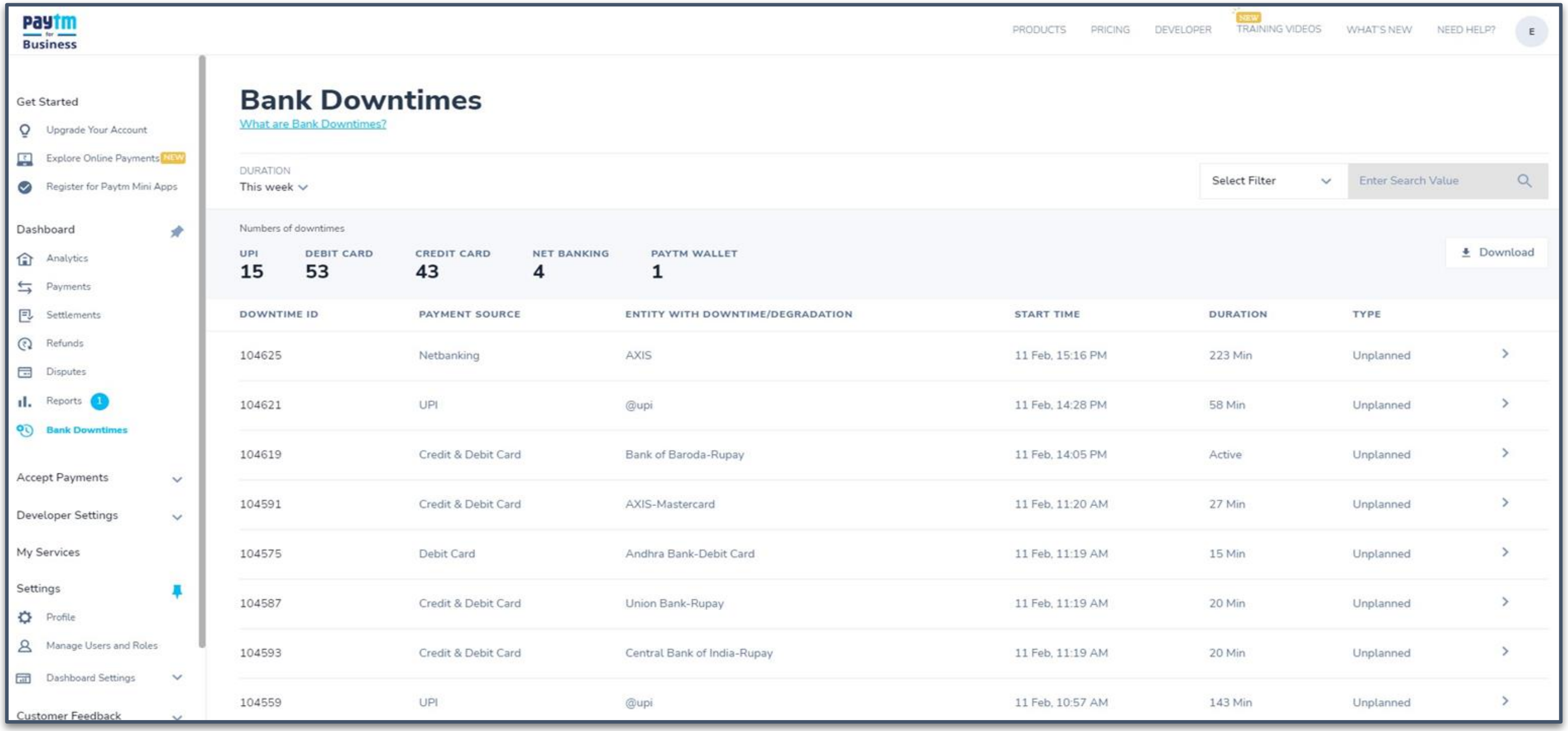
Step 1: Click on reports
Step 2: Click on particular section of report you wish to download
Step 3: Click on manage report to customize the report as per your requirement
Step 4: Select the desired duration and click on Generate report
Step 5: Click on ‘Download’ icon to download the report

Note: If you have Business wallet, you can download settlement reports from the Balance statement Tab under report section



Bank Downtime Tab

- This feature gives you the summary view of the total downtimes on each payment source.
- You can also see the list view of selected duration.
- The detail view gives you the minute level performance of the downtime entity around the downtime duration.
- It also gives you the historic performance view of up to 60 days.

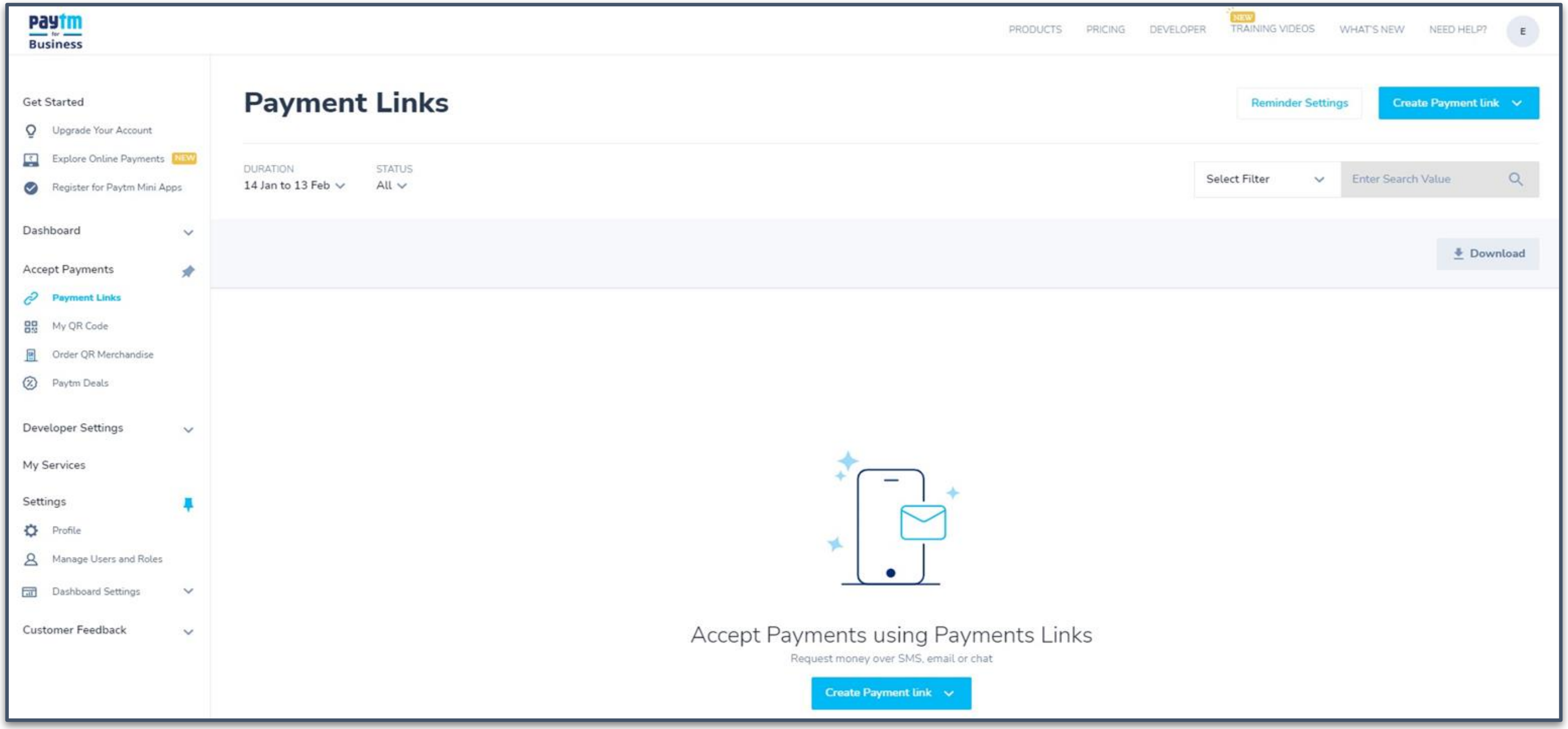


Payment Link Tab

This tab will help you create link from which you can accept payments from your customers.

Step 1: Click on 'Accept Payments'
Step 2: Click on 'Payment Links' to create payment link
Step 3: Click on Quick Payment Link or Detailed Payment Link

Note: Quick Payment Link is available by default for all merchant and Detailed Payment Link is only available for merchants with monthly limit of 500k and above.



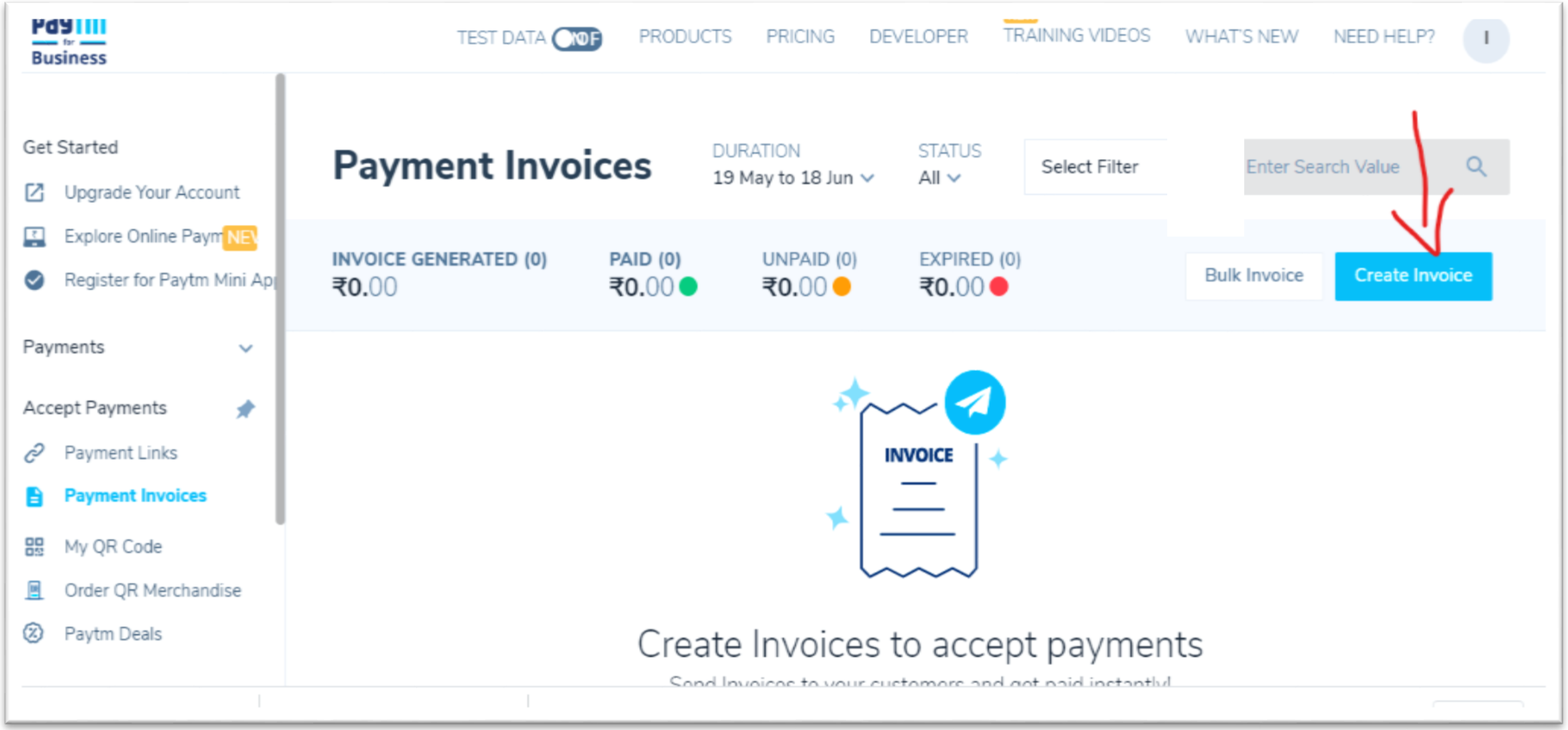
Quick Payment Link vs Detailed Payment Link

Quick Links vs Detailed Links

	Quick Payment Link	Detailed Payment link
No of Customers per URL	Merchant can choose the number of payments to be accepted on a link. This can be between 1 to unlimited. For offline merchants 1 customer per link is allowed	Merchant can choose the number of payments to be accepted on a link. This can be between 1 to unlimited. For offline merchants 1 customer per link is allowed
Fixed/Dynamic Amount	Customer can pay a predefined amount or merchants can let users enter any amount to pay	Amount is calculated dynamically basis customer selection on the form created by the merchant
User Information	Payment Mobile number is shared with the merchant	Merchant can create a custom form to request required information before user proceeds to payment
Partial Payments	Customers can make payments in parts using the same link.	This feature is not available on detailed payment links
Code Embedding on Website	You can embed a Quick Payment link on your website.	You can embed a detailed Payment link on your website.
Payment Reminders	You can send automated SMS reminders to customers to make payments.	NA.
Bulk Upload	You can create upto 50k Quick Payment Links at a time using the bulk feature.	You can create upto 50k Detailed Payment Links at a time using the bulk feature.
APIs	Payment Links can be created using the Dashboard or APIs.	Payment Links can be created using the Dashboard or APIs.
Use Cases	Collection of fees, loan installments, in-store payments, product sale and so on.	Product sale, donations, event ticketing, School fee collection

Payment Invoices Tab

- You can see all Invoice related details (Paid, Unpaid & Expired).
- You can filter the invoice details by selecting the specific duration.
- Also, you can search a particular invoice details by using the ‘Select filter’ option.
- You have 2 options to create Invoice- Bulk Invoice and Create Invoice.

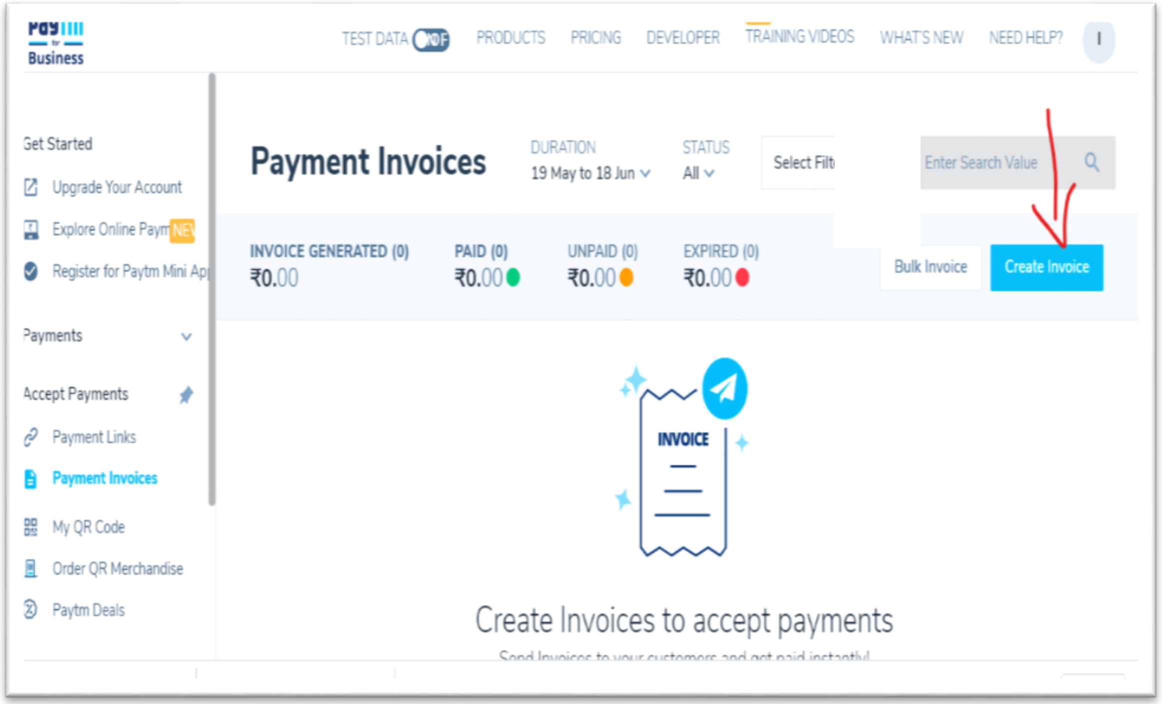


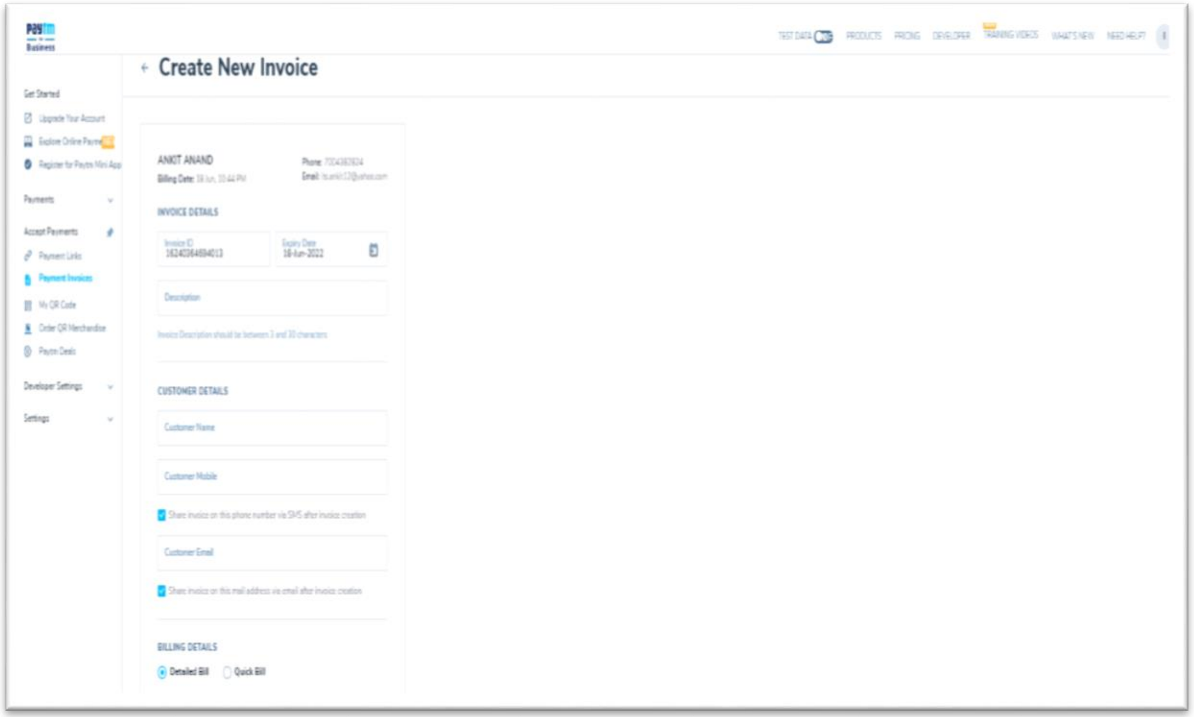
Steps to create Invoice

Step 1: Click on "Create Invoice"
Step 2: Enter all the details (Customer name, Mobile Number, Product description, Item name and Quantity)
Step 3: Post entering the details you can able to share the link to mobile number/email ID

Steps to create Invoices in Bulk

Step 1: Click on "Create Invoice"
Step 2: Download the sample file and read the instructions carefully
Step 3: Fill the details in sample and upload it by clicking on 'Upload bulk invoice file'



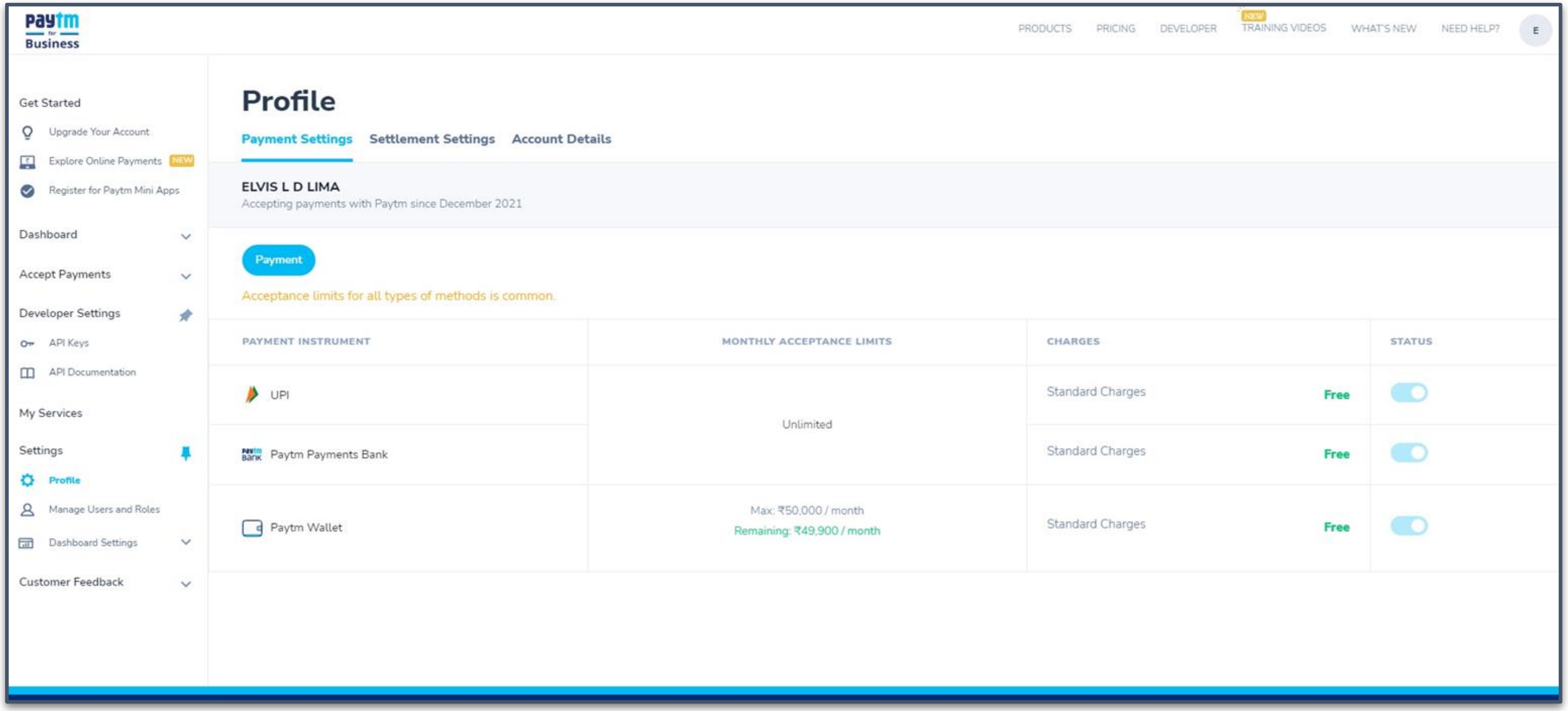


Profile Tab

Step 1: Click on 'Profile' under settings tab
Step 2: Under Profile three settings will be visible (Payment Settings, Payout Settings & Account details)

Payment Settings

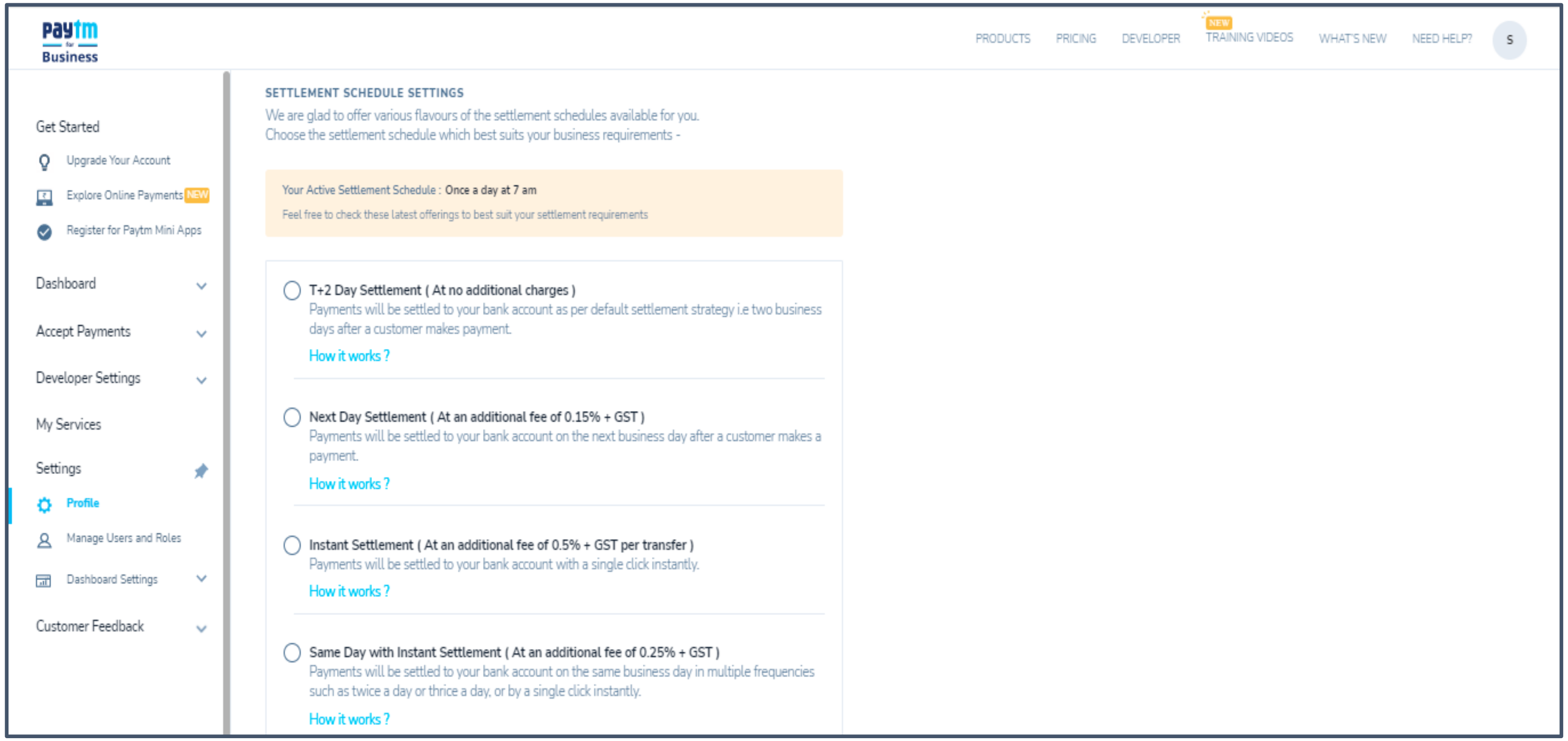
Step 1: Click on Payment settings
Step 2: Here you can see activated and available payments instrument
Step 3: You can also view your payments limit and applicable charges for each payment instruments



Settlement Settings

- Click on Settlement settings
- Here you can see your settlement cycle

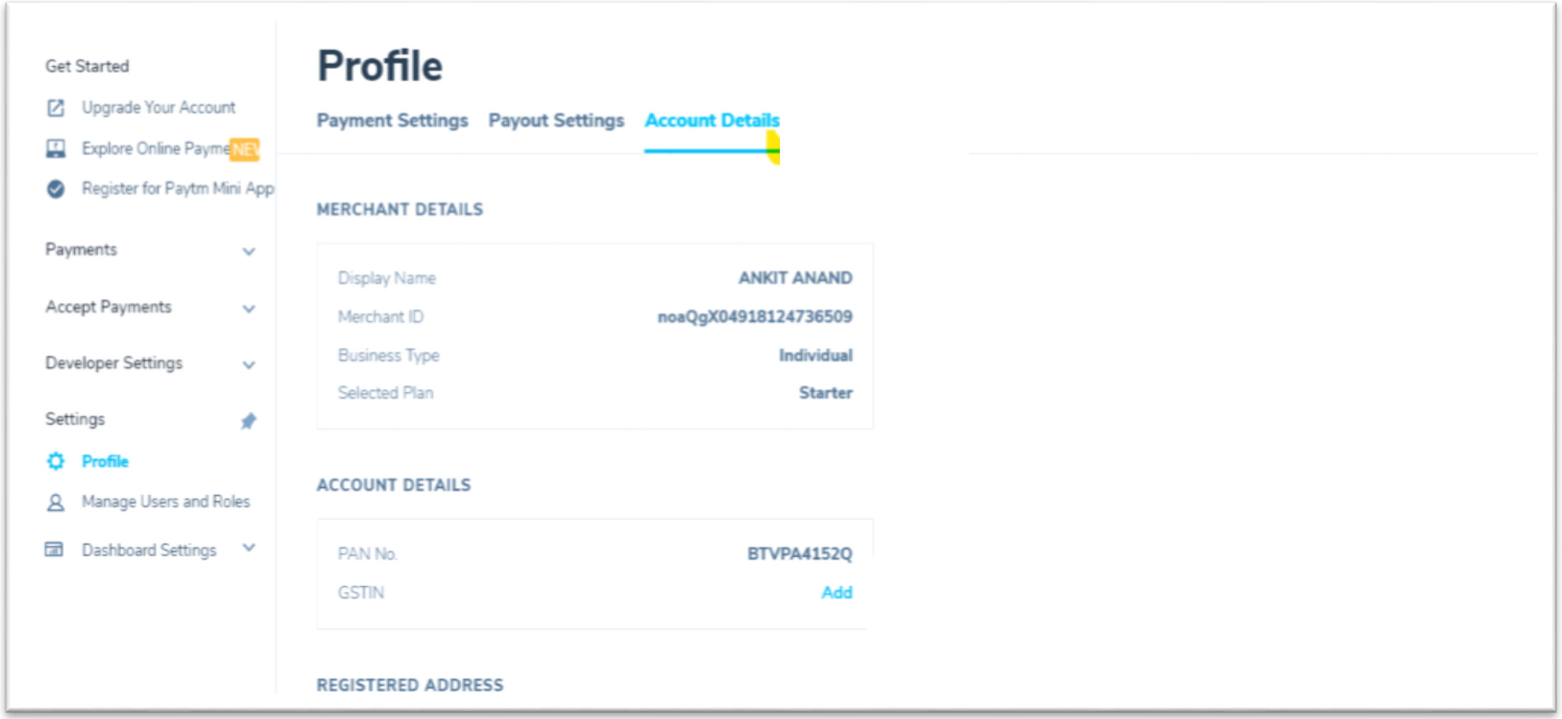
Note: Settlement cycle view will vary depending on the settlement feature of your account.



Account Details

- Under this feature you can see all your business related details.
- Your Merchant details, Account details, Registered address and other details will be visible here.

Note: Add GST and Deactivate account option depends on your merchant account type



Manage Users and Roles

USERS:

You can create sub users with complete or restricted access of your Merchant Dashboard.
Use mobile number or email ID to add sub-users from the 'Manage Users' tab. If the sub-user is not already on Paytm, they will get an email and SMS to create an account and then join the team on the dashboard.

Please Note: You are the admin of this dashboard by default, however you can add 1 more Admin who will have same rights as you (but can't add any user admin), also consider the following points while adding sub user and sub user roles:

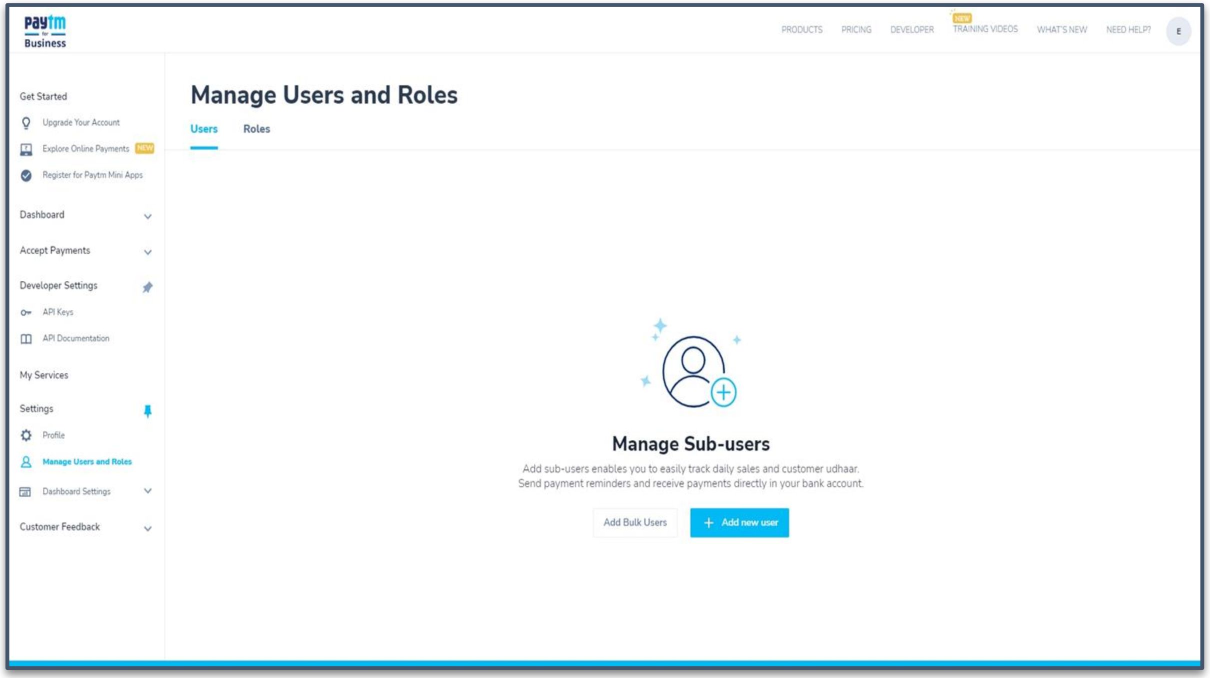
- Whenever a sub user is added to the dashboard, a notification will be sent to the sub-user via email and SMS, they can log in to the dashboard and either Accept or Decline the request. Until the sub-user takes any action, you will see the status as Pending. If the added sub-user is not already a Paytm customer, he will not be shown in pending status.
- If you have raised admin rights requests to two or more users then a request will be sent to them, then the first user accepting the request will be allowed as an admin
- You can add only 1 user admin to the dashboard who will by default only have rights to Create/Edit Users and View Users and also create roles.

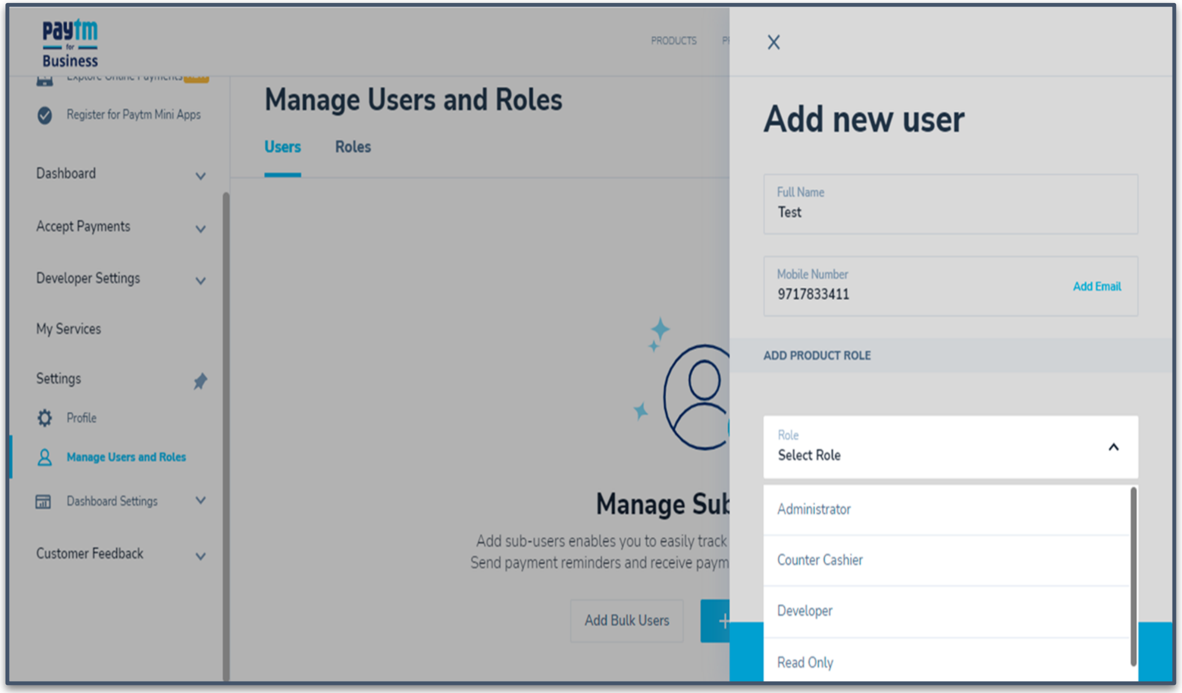
How to add Sub User

Step 1: Click on 'Add sub user' to create a sub-user of your dashboard
Step 2: Enter the sub-user Full name, Mobile number and the Product role
Step 3: Click on 'Add user' to complete the process

How to Sub User Bulk

Step 1: Click on 'Bulk sub user' to create a sub-user in bulk
Step 2: Download the sample file and fill the required details
Step 3: As per instruction upload the file to complete the process

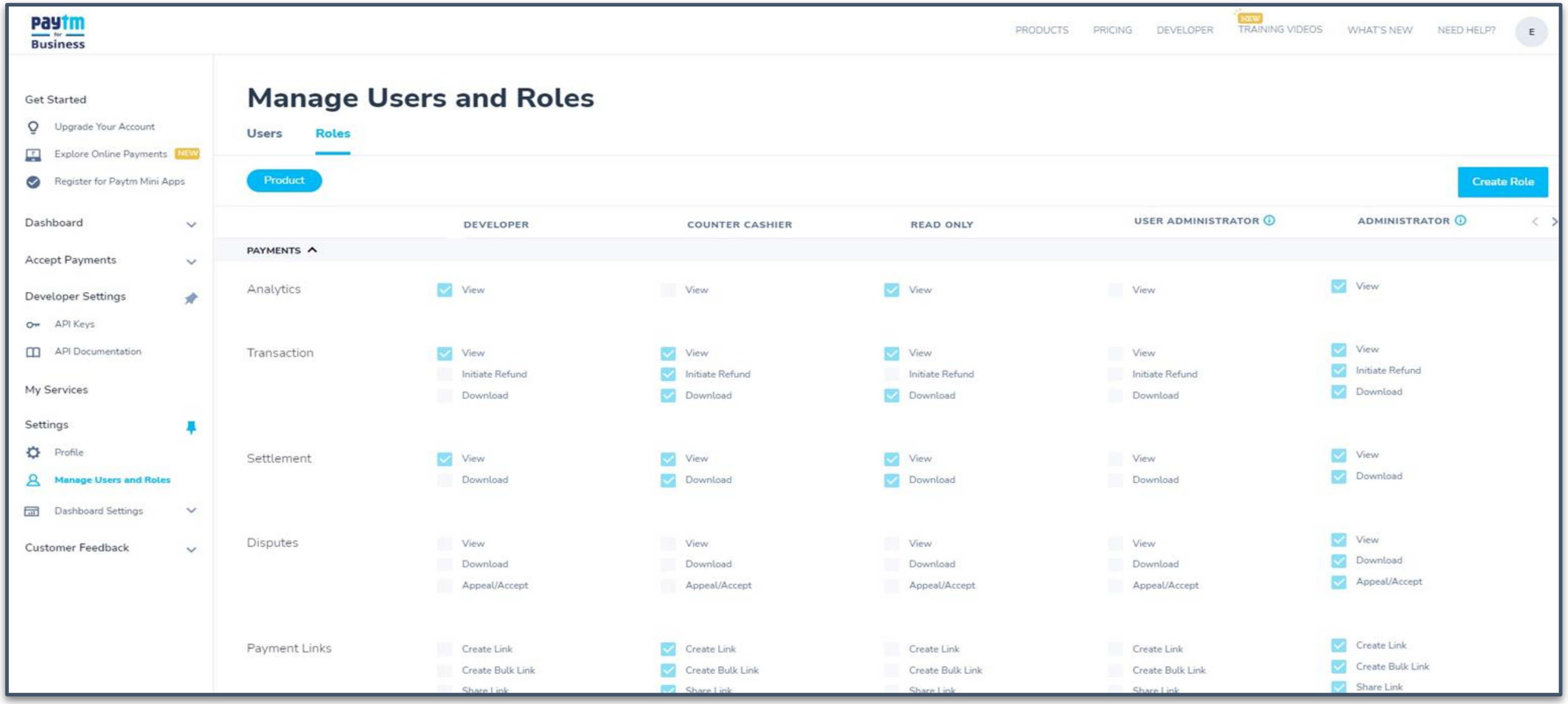




How to Create Roles

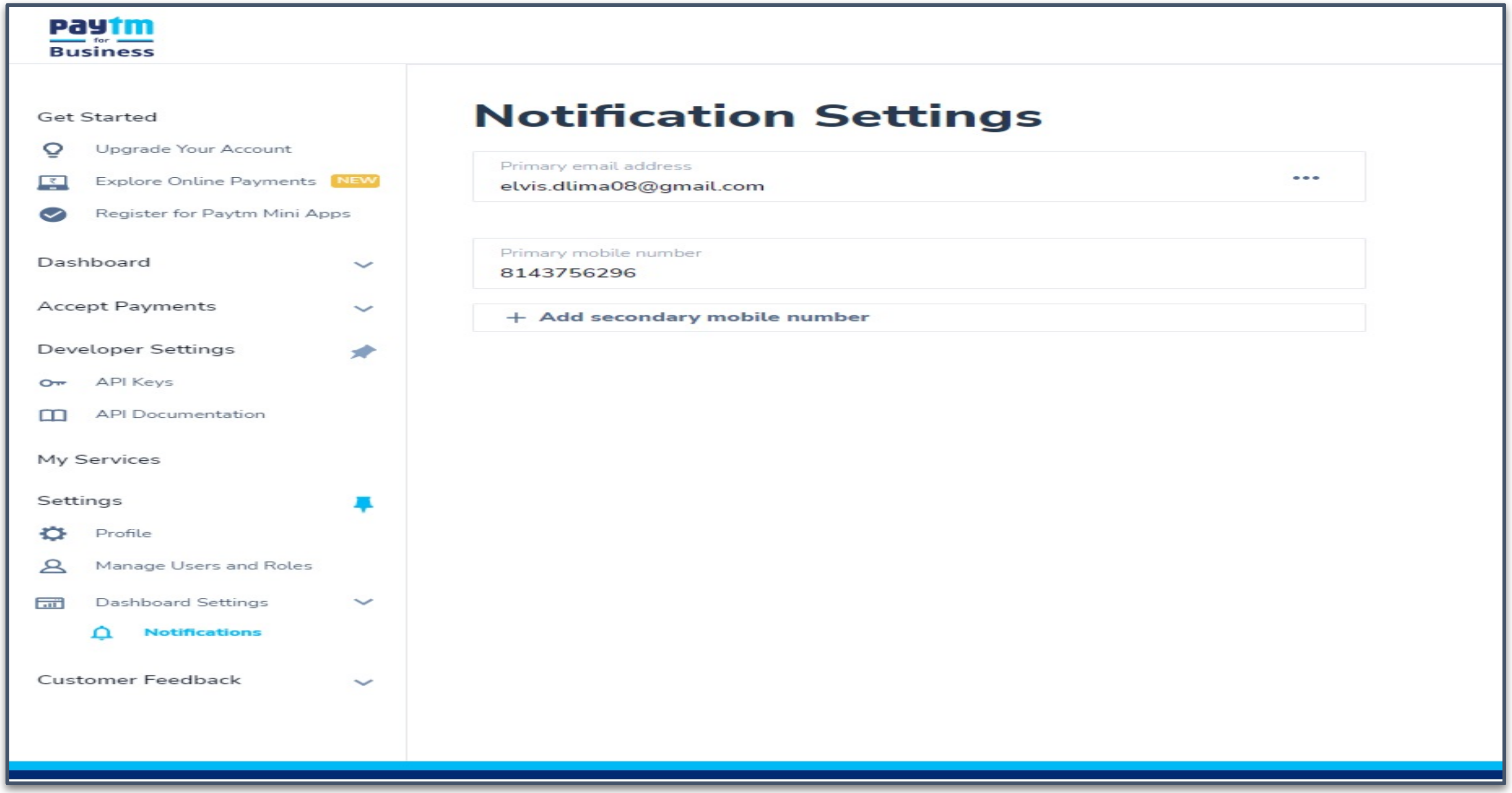
Paytm Payments Services

Step 1: Click on 'Roles' under Manage Users and Roles
Step 2: 4 roles will be visible by default (Administrator, Cashier, Read only and User administrator)
Step 3: Click on 'Create Role' on top right
Step 4: Fill in the required details
Step 5: After filling all the details click on 'Create role'



Notification settings

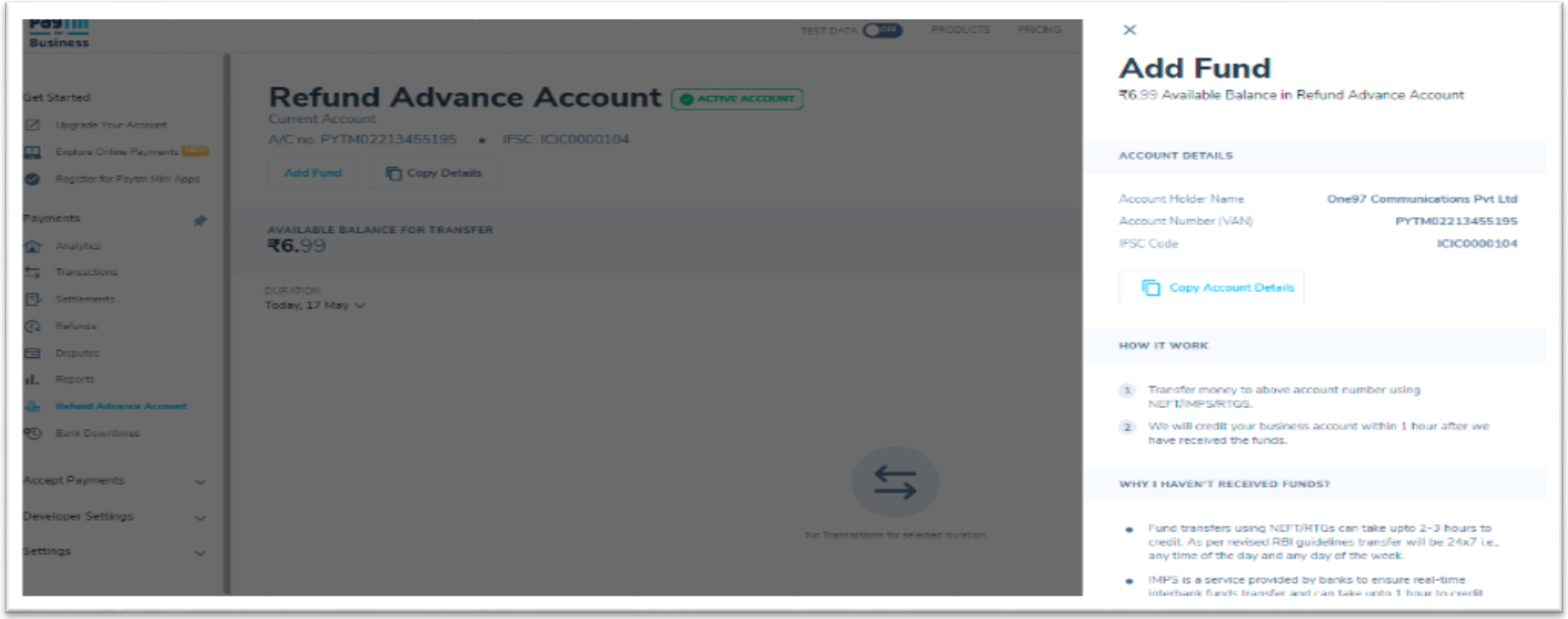
- Here you can see your Primary Email address and mobile number.
- You can also add secondary mobile number by clicking on “Add” option.
- Option to edit Primary email ID is available based on merchant type.



Refund Advance Account

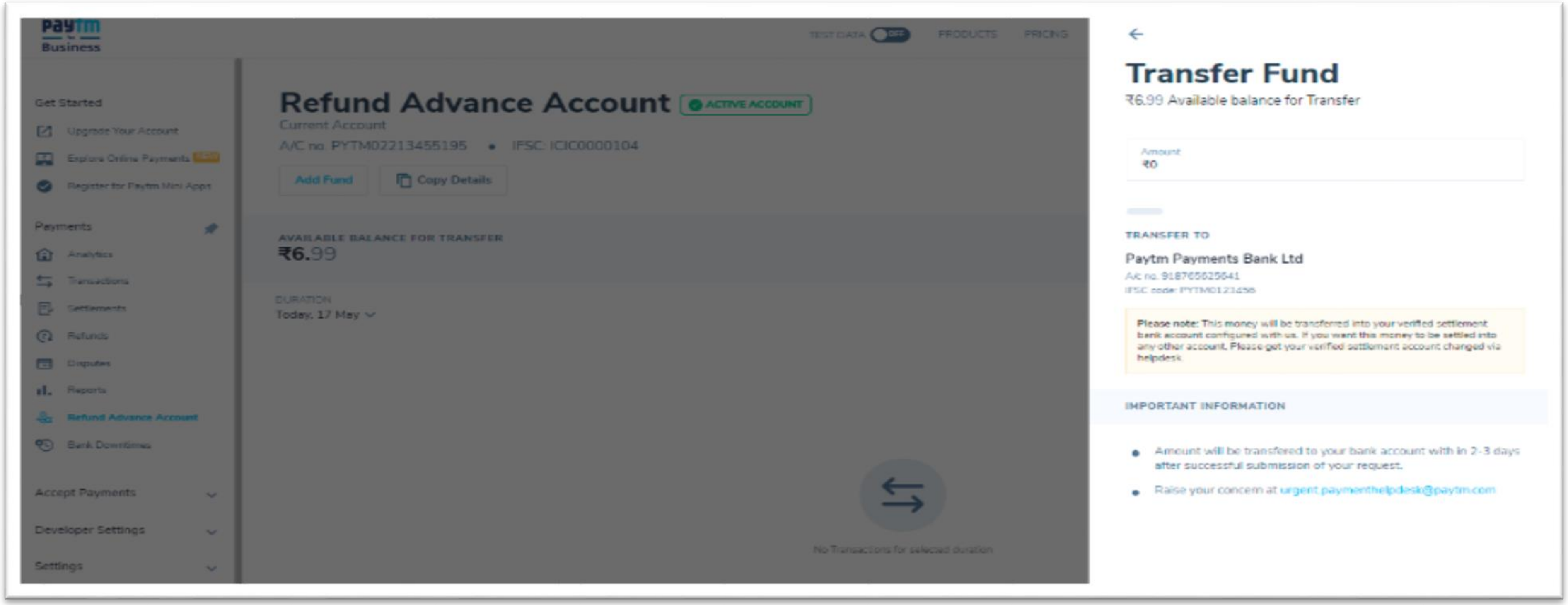
Step 1: Click on ‘Refund Advance Account’ in the left panel on merchant dashboard
Step 2: You will see the account screen
Step 3: Under account screen you will see the Account details, Account status, How does it work section and CTA to add funds
Step 4: Click on ‘Add fund’ option and a pop up will open with guides on how to transfer funds
Step 5: After successful fund transfer, you can see the updated balance in the ‘Available balance for transfer’
Step 6: You can see the entries with details of the successful fund transfer

Note: Refund Advance Account tab is visible to the merchant who has opted for it.



How to withdraw money from Refund Advance Account

Step 1: Click on ‘Transfer to Bank’ option to proceed with withdrawal
Step 2: Once the request is submitted successfully, you can see the updated balance
Step 3: You can check the details of your withdrawal in Passbook under the ‘Transfer to Bank’ entry type
Step 4: You will receive the funds in your verified bank account within 2-3 working days
Step 5: UTR number of transfer can be seen under ‘Transfer to Bank’



THANK YOU