

UMP/Merchant Dashboard Guide




Content

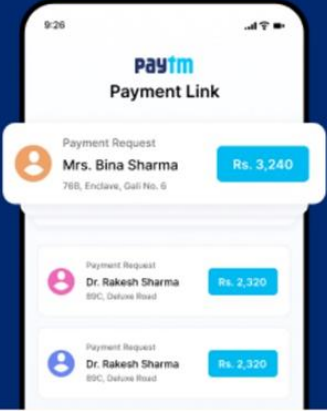
1. Login Process
2. Analytics Tab
3. Transaction Tab
4. Settlement Tab
5. Refund Tab
6. Dispute Tab
7. Report Tab
8. Bank Downtime Tab
9. Payment Link Tab
10. Payment Invoice
11. Profile Tab
 - a. Payment Setting
 - b. Payout Setting
 - c. Account Setting
12. Manage Users and Role
13. Notification Settings
14. Refund Advance Account

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.





Paytm Payment Links


Accept payments via Whatsapp/SMS/Email.
No coding required.

[Learn more >](#)

Login with your Paytm account


[Paytm App user? No need to create a new account](#)

PLEASE NOTE: Paytm and Paytm for Business Dashboard password are same.

 **Sign in Securely** >

[Forgot Password](#)

By signing in, you agree to our [privacy policy](#) and [terms of use](#).



OR Login through QR Code
[click here](#)

New to Paytm?

[Create an Account](#)

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

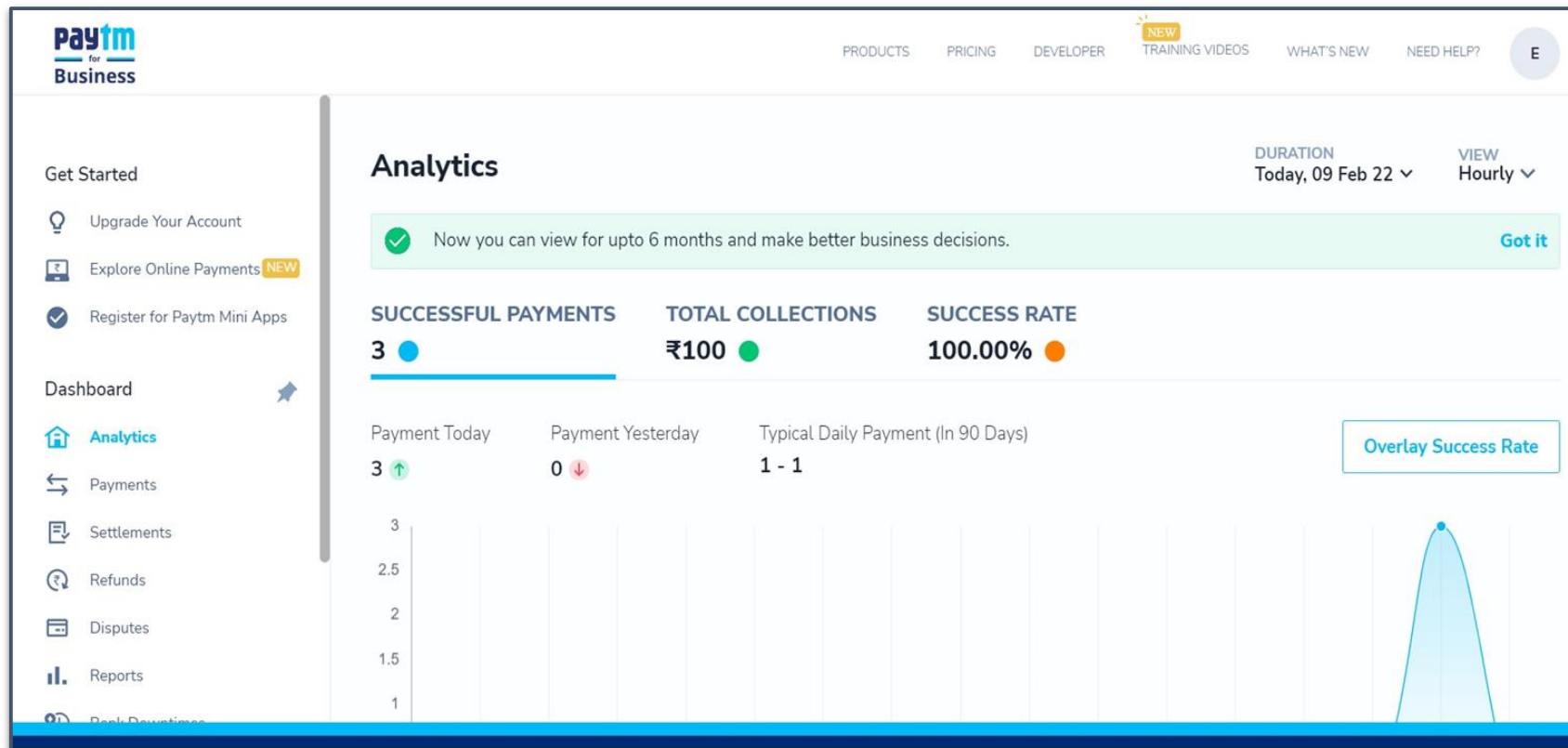
- If your email ID/Mobile number is not registered with Paytm
Please reach out to Helpdesk team to get access the password reset link email.
- If your email ID/mobile number registered with Paytm:
Please click on forgot password option to reset the password.

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.

The screenshot displays the Paytm Business Payments dashboard. At the top, there's a navigation bar with links for PRODUCTS, PRICING, DEVELOPER, TRAINING VIDEOS, WHAT'S NEW, and NEED HELP?. Below this is a promotional banner for SoundBox voice alerts. The main section is titled 'Payments' and shows filters for DURATION (Yesterday, 9 Feb) and STATUS (Success). It displays summary statistics: TOTAL PAYMENTS ₹200.00 and TOTAL TRANSACTIONS 4. A table lists the transactions with columns for TRANSACTION ID, DATE, ORDER ID, PAYMENT SOURCE, and AMOUNT. The table contains four entries, all with a status of 'Success'.

TRANSACTION ID	DATE	ORDER ID	PAYMENT SOURCE	AMOUNT
20220209111212800110168694102533476	09 Feb, 03:30 PM	202202091530420003	Paytm Wallet	₹100.00
20220209111212800110168414701907704	09 Feb, 03:27 PM	202202091527090045	UPI	₹30.00
20220209111212800110168411701956746	09 Feb, 03:27 PM	2022020915265200124	UPI	₹50.00
20220209111212800110168414901935480	09 Feb, 03:26 PM	2022020915255400103	UPI	₹20.00

Steps to initiate Refund from Payments tab

The screenshot shows the Paytm Business Payments tab. On the left is a sidebar with navigation options: Register for Paytm Mini Apps, Dashboard, Analytics, Payments (selected), Settlements, Refunds, Disputes, Reports, Bank Downtimes, Accept Payments, Developer Settings, My Services, Settings, and Customer Feedback. The main area displays a 'Payments' summary with filters for 'Today, 9 Feb' and 'Success'. It shows 'TOTAL PAYMENTS ₹200.00' and 'TOTAL TRANSACTIONS 4'. Below this is a table of transactions:

TRANSACTION ID	DATE	ORDER ID
20220209111212800110168694102533476	09 Feb, 03:30 PM	2022020915...
20220209111212800110168414701907704	09 Feb, 03:27 PM	2022020915...
20220209111212800110168411701956746	09 Feb, 03:27 PM	2022020915...
20220209111212800110168414901935480	09 Feb, 03:26 PM	2022020915...

A modal titled 'Payment Received' is open on the right, showing a payment of ₹30.00 received on 09 Feb 2022, 03:27 pm. It includes details for the payment source (State Bank Of India) and customer information (Mobile Number: 79****9254, Email ID: lazro.***@gmail.com, Customer ID: 1062883045). An 'Initiate Refund' button is visible.

- **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

This screenshot shows the 'Initiate Refund' modal. It displays the 'TOTAL PAYMENTS ₹200.00' and 'TOTAL TRANSACTIONS 4' again. The modal title is 'Initiate Refund' with a subtitle '₹0.00 Total Available for Refund'. It shows the 'Payment Amount' as ₹30.00, 'Refunded Already' as ₹0.00, and 'Total Refund Allowed' as ₹30.00. There are input fields for 'Enter Amount to Refund' and 'Refund Remarks'. At the bottom, there is a button labeled 'Refund to customer'.

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'.

paytm Business

PRODUCTS PRICING DEVELOPER TRAINING VIDEOS WHAT'S NEW NEED HELP?

Get Started
Upgrade Your Account
Explore Online Payments
Register for Paytm Mini Apps

Dashboard
Analytics
Payments
Settlements
Refunds
Disputes
Reports
Bank Downtimes

Accept Payments
Developer Settings
My Services
Settings
Profile
Manage Users and Roles

Settlements

DURATION: 1 Jan to 31 Jan

Select Filter Enter Search Value

AMOUNT SETTLED ₹50.00 BALANCE AVAILABLE FOR TRANSFER ₹0.00 PENDING AMOUNT ₹0.00

View Balance Statement

Download

DATE	TIME	PAYMENT AMOUNT	DEDUCTION	NET AMOUNT
22 Jan 2022				
✔ UTR: 5C057005rQE4	12:35 PM	-	-	₹50.00
✘ Transfer Failed Click for more details	07:29 AM	-	-	₹50.00

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.

The screenshot displays the Paytm Business Refunds dashboard. On the left is a sidebar with navigation options: Get Started (Upgrade Your Account, Explore Online Payments, Register for Paytm Mini Apps), Dashboard (Analytics, Payments, Settlements, Refunds, Disputes, Reports, Bank Downtimes), Accept Payments, Developer Settings, My Services, and Settings (Profile, Manage Users and Roles). The main content area is titled 'Refunds'. It features filters for DURATION (This week) and STATUS (Success), a search bar, and buttons for Bulk Refunds and Download. Summary statistics show a TOTAL REFUND AMOUNT of ₹100.00 and TOTAL REFUND TRANSACTIONS of 1. Below this is a table with one entry:

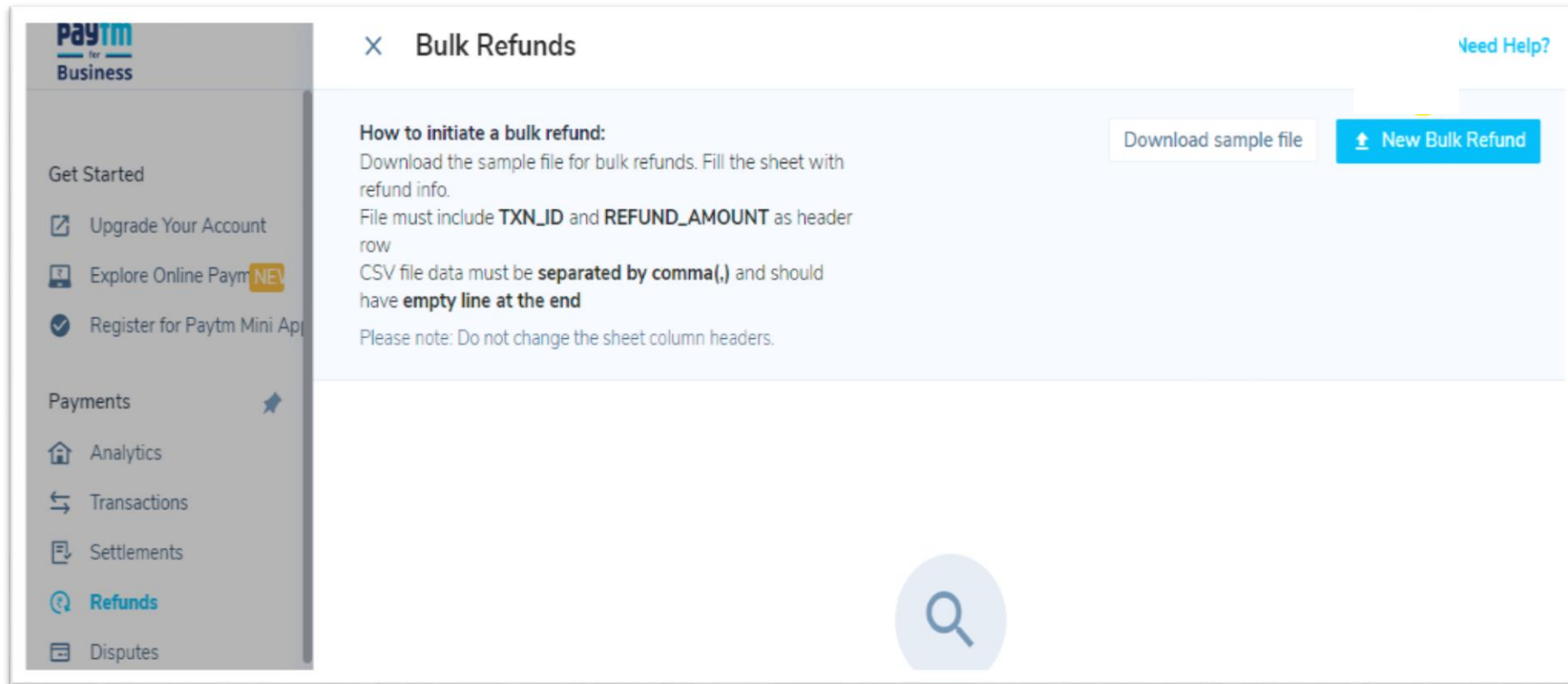
REFUND ID	REFUND DATE	PAYMENT ORDER ID	REFUND AMOUNT
20220209111212801300168694694601881	09 Feb, 03:32 PM	202202091530420003	₹100.00

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.

The screenshot shows the Paytm Business Disputes dashboard. On the left is a sidebar with navigation options: Get Started (Upgrade Your Account, Explore Online Payments, Register for Paytm Mini Apps), Dashboard (Analytics, Payments, Settlements, Refunds, Disputes, Reports, Bank Downtimes), Accept Payments, Developer Settings, My Services, and Settings (Profile, Manage Users and Roles). The main content area is titled 'Disputes' and includes a filter for 'DURATION' (12 Jan to 11 Feb) and a search bar. Below this, a table shows 'TOTAL DISPUTES' and 'TOTAL DISPUTE AMOUNT', both with a value of 0. A 'Download Reports' button is present. At the bottom, a large blue circle with a document icon and the text 'No Disputes' is displayed.

Category	Value
TOTAL DISPUTES	0
TOTAL DISPUTE AMOUNT	0

Reports Tab

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

Step 1: Click on reports

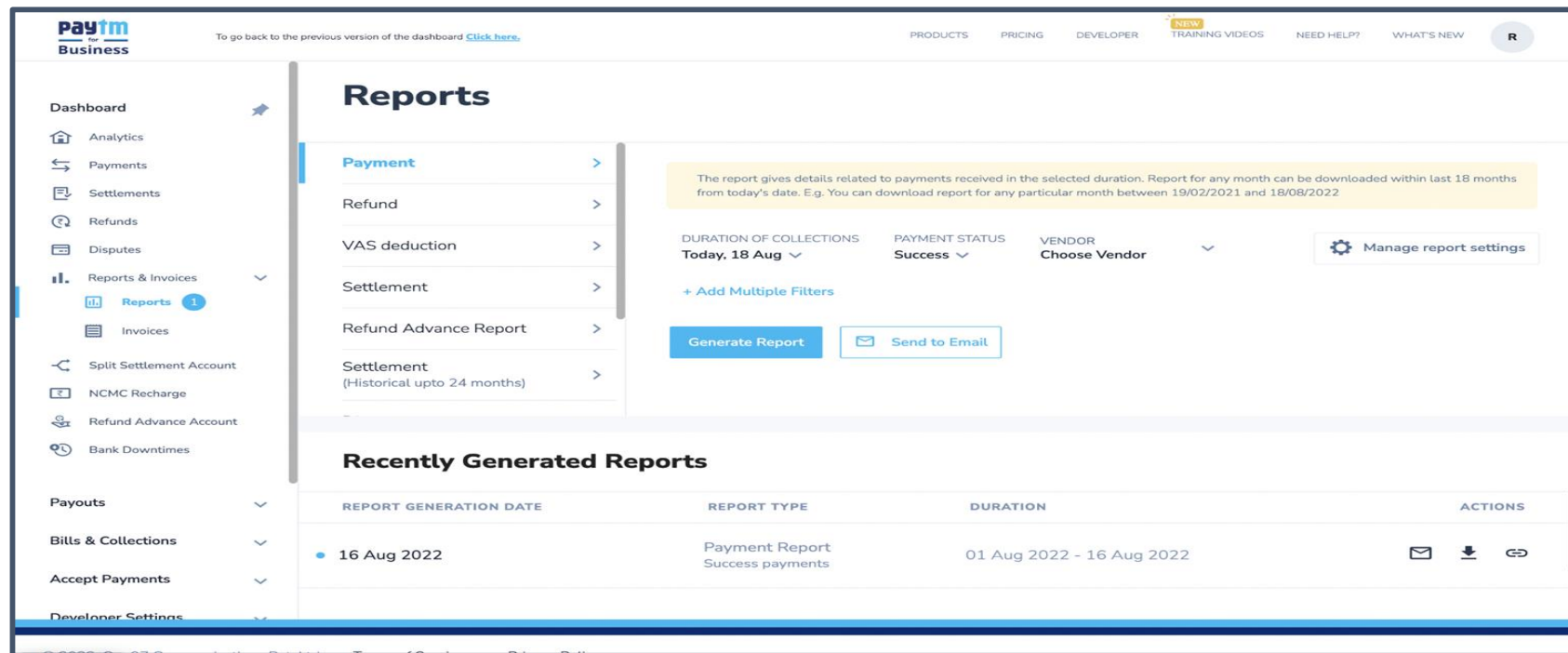
Step 2: Click on particular section of report you wish to download

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



paytm Business

To go back to the previous version of the dashboard [Click here.](#)

PRODUCTS PRICING DEVELOPER **NEW** TRAINING VIDEOS NEED HELP? WHAT'S NEW **R**

Reports

Payment

The report gives details related to payments received in the selected duration. Report for any month can be downloaded within last 18 months from today's date. E.g. You can download report for any particular month between 19/02/2021 and 18/08/2022

Refund

VAS deduction

Settlement

Refund Advance Report

Settlement (Historical upto 24 months)

DURATION OF COLLECTIONS Today, 18 Aug

PAYMENT STATUS Success

VENDOR Choose Vendor

+ Add Multiple Filters

Generate Report Send to Email

Manage report settings

Recently Generated Reports

REPORT GENERATION DATE	REPORT TYPE	DURATION	ACTIONS
16 Aug 2022	Payment Report Success payments	01 Aug 2022 - 16 Aug 2022	Email Download Share

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.

Bank Downtimes
[What are Bank Downtimes?](#)

DURATION
This week ▾

Select Filter ▾ Enter Search Value 🔍

Numbers of downtimes

UPI	DEBIT CARD	CREDIT CARD	NET BANKING	PAYTM WALLET
15	53	43	4	1

Download

DOWNTIME ID	PAYMENT SOURCE	ENTITY WITH DOWNTIME/DEGRADATION	START TIME	DURATION	TYPE	
104625	Netbanking	AXIS	11 Feb, 15:16 PM	223 Min	Unplanned	>
104621	UPI	@upi	11 Feb, 14:28 PM	58 Min	Unplanned	>
104619	Credit & Debit Card	Bank of Baroda-Rupay	11 Feb, 14:05 PM	Active	Unplanned	>
104591	Credit & Debit Card	AXIS-Mastercard	11 Feb, 11:20 AM	27 Min	Unplanned	>
104575	Debit Card	Andhra Bank-Debit Card	11 Feb, 11:19 AM	15 Min	Unplanned	>
104587	Credit & Debit Card	Union Bank-Rupay	11 Feb, 11:19 AM	20 Min	Unplanned	>
104593	Credit & Debit Card	Central Bank of India-Rupay	11 Feb, 11:19 AM	20 Min	Unplanned	>
104559	UPI	@upi	11 Feb, 10:57 AM	143 Min	Unplanned	>

Payment Link Tab

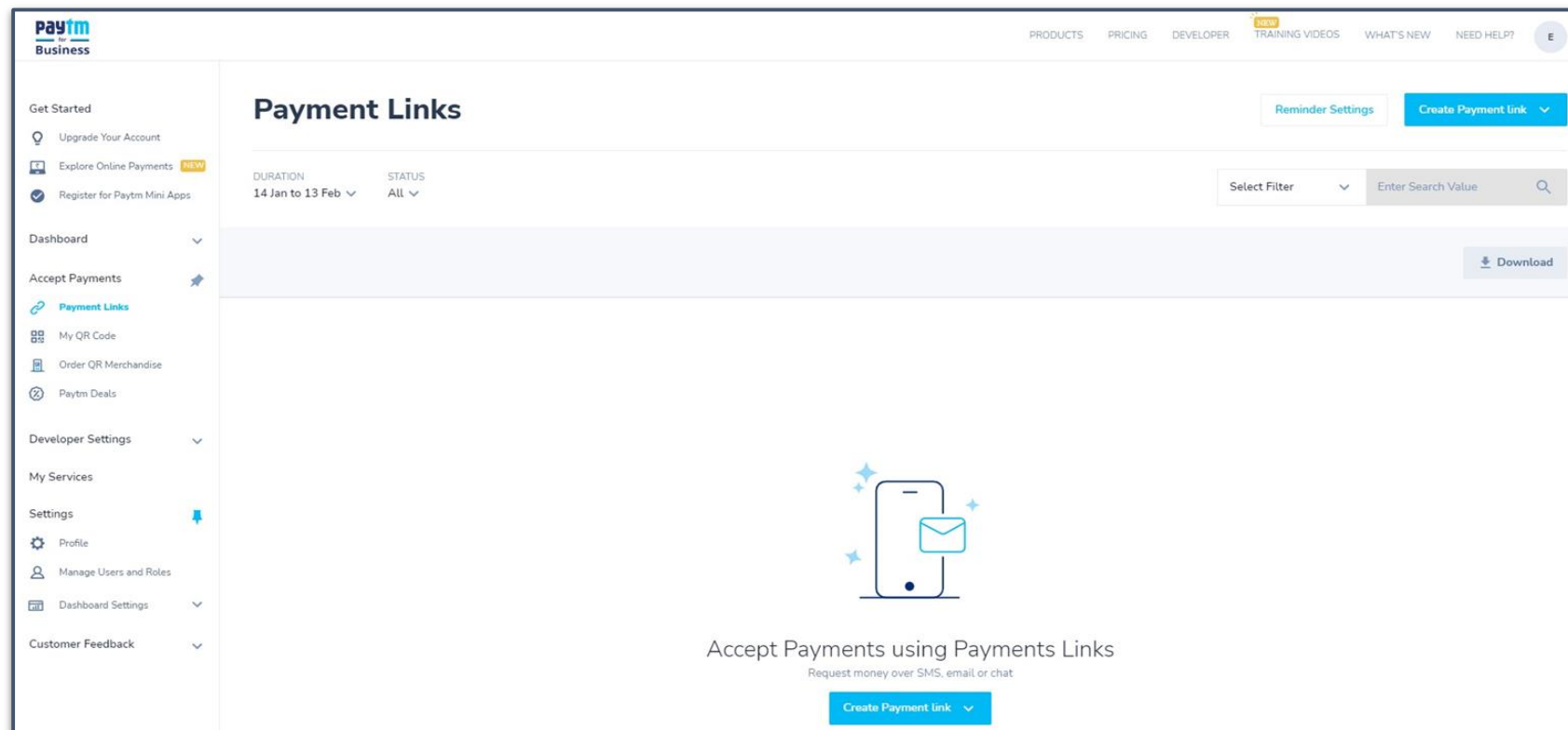
This tab will help you create link from which you can accept payments from your customers.

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.

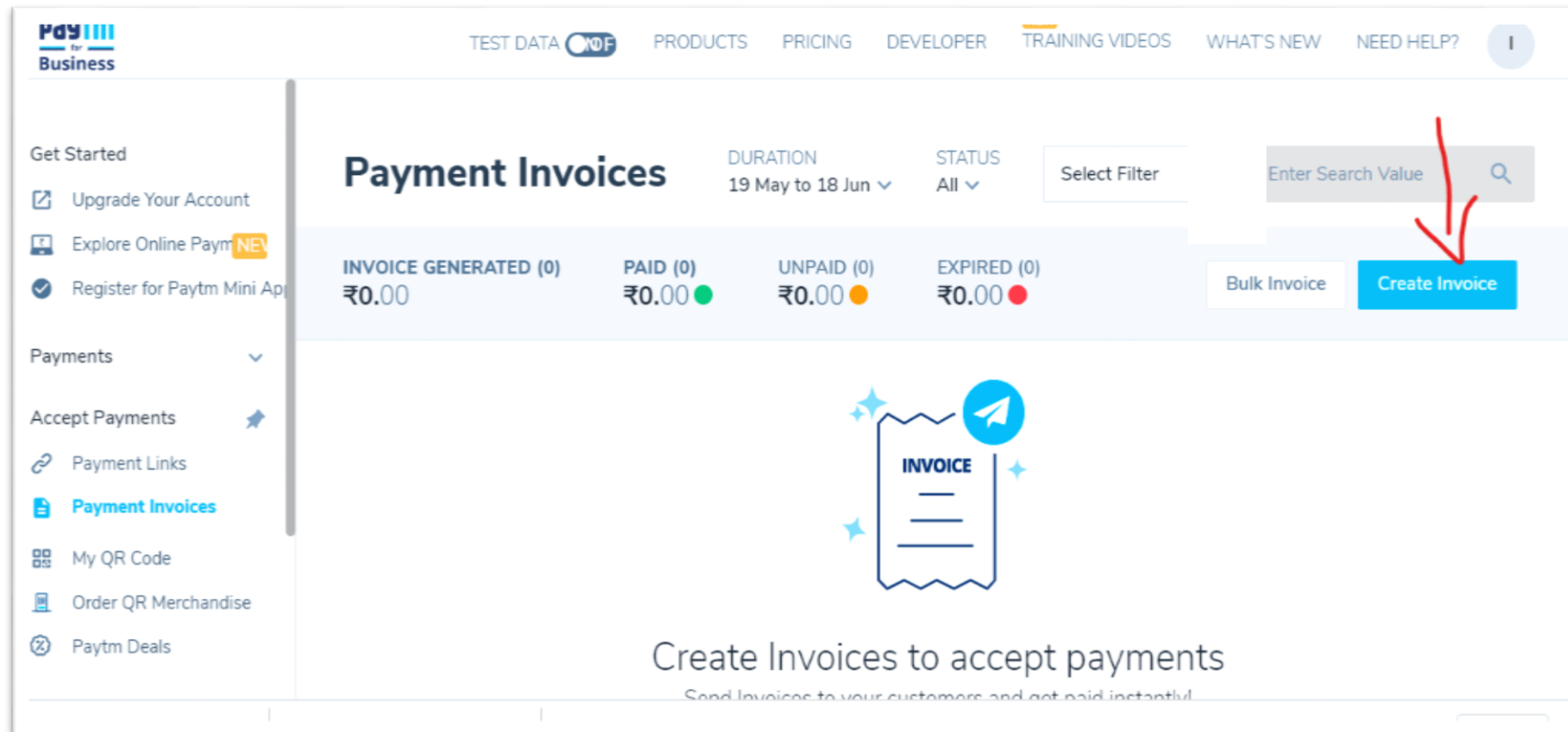


Quick Payment Link vs Detailed Payment Link

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’

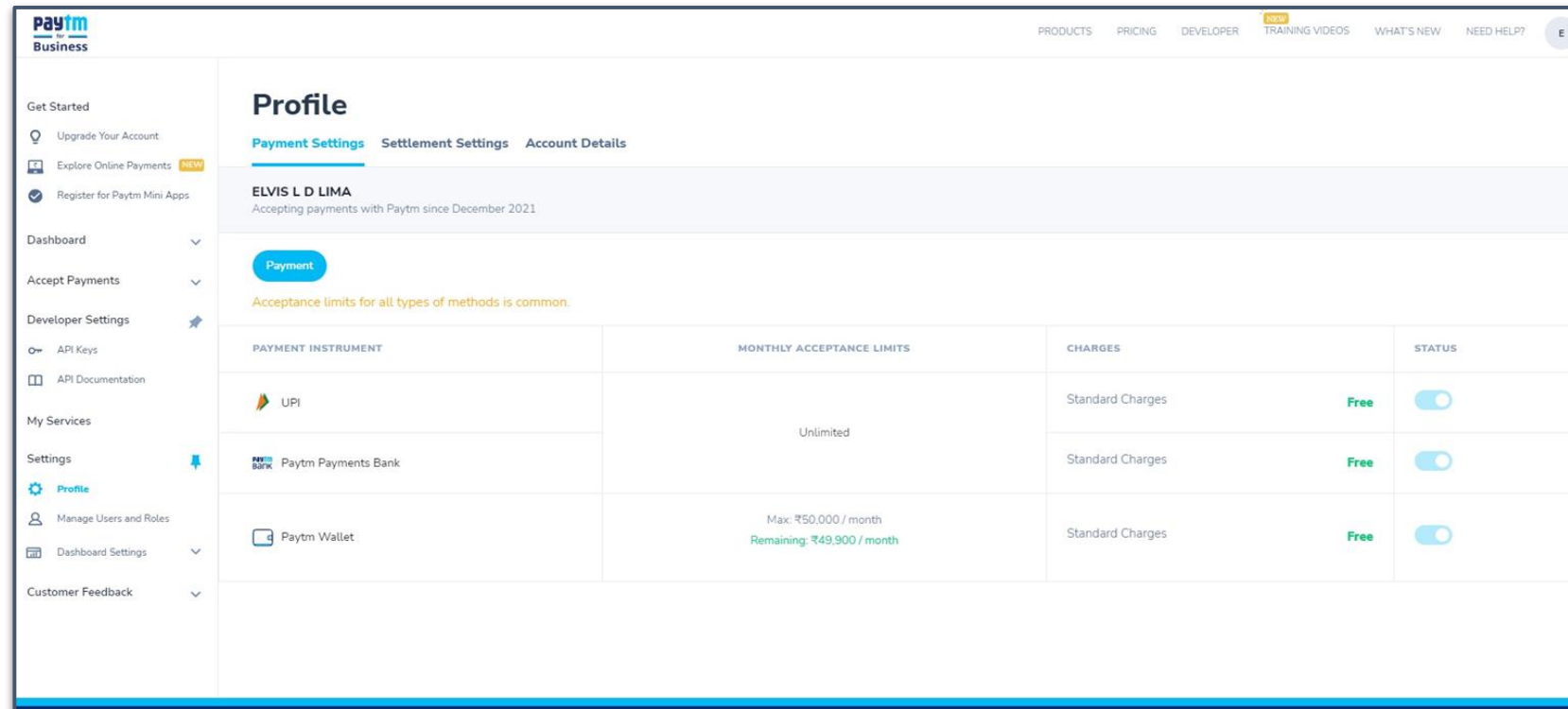
The screenshot shows the Paytm Business dashboard. On the left is a sidebar with navigation options: Get Started, Upgrade Your Account, Explore Online Payments, Register for Paytm Mini App, Payments, Accept Payments, Payment Links, Payment Invoices (highlighted), My QR Code, Order QR Merchandise, and Paytm Deals. The main area is titled 'Payment Invoices' and includes filters for DURATION (19 May to 18 Jun) and STATUS (All). Below the filters are four status boxes: INVOICE GENERATED (0) ₹0.00, PAID (0) ₹0.00, UNPAID (0) ₹0.00, and EXPIRED (0) ₹0.00. At the bottom of this section are buttons for 'Bulk Invoice' and 'Create Invoice'. A red arrow points to the 'Create Invoice' button. Below the buttons is an illustration of an invoice with a paper plane icon and the text 'Create Invoices to accept payments'.

The screenshot shows the 'Create New Invoice' form. It includes a sidebar with navigation options: Get Started, Upgrade Your Account, Explore Online Payments, Register for Paytm Mini App, Payments, Accept Payments, Payment Links, Payment Invoices (highlighted), My QR Code, Order QR Merchandise, Paytm Deals, Developer Settings, and Settings. The main form area is titled '+ Create New Invoice' and contains the following sections: ANKIT ANAND (Billing Date: 18 Jun, 10:44 PM, Phone: 9243676204, Email: ankit123@paytm.com), INVOICE DETAILS (Invoice ID: 1824364894013, Expiry Date: 18-Jun-2022, Description field), CUSTOMER DETAILS (Customer Name, Customer Mobile, Customer Email fields), BILLING DETAILS (Share invoice on this phone number via SMS after invoice creation, Share invoice on this mail address via email after invoice creation), and a toggle for 'Detailed Bill' and 'Quick Bill'.

paytm
Payments Services

Step 2: Under Profile three settings will be visible (Payment Settings, Payout Settings & Account details)

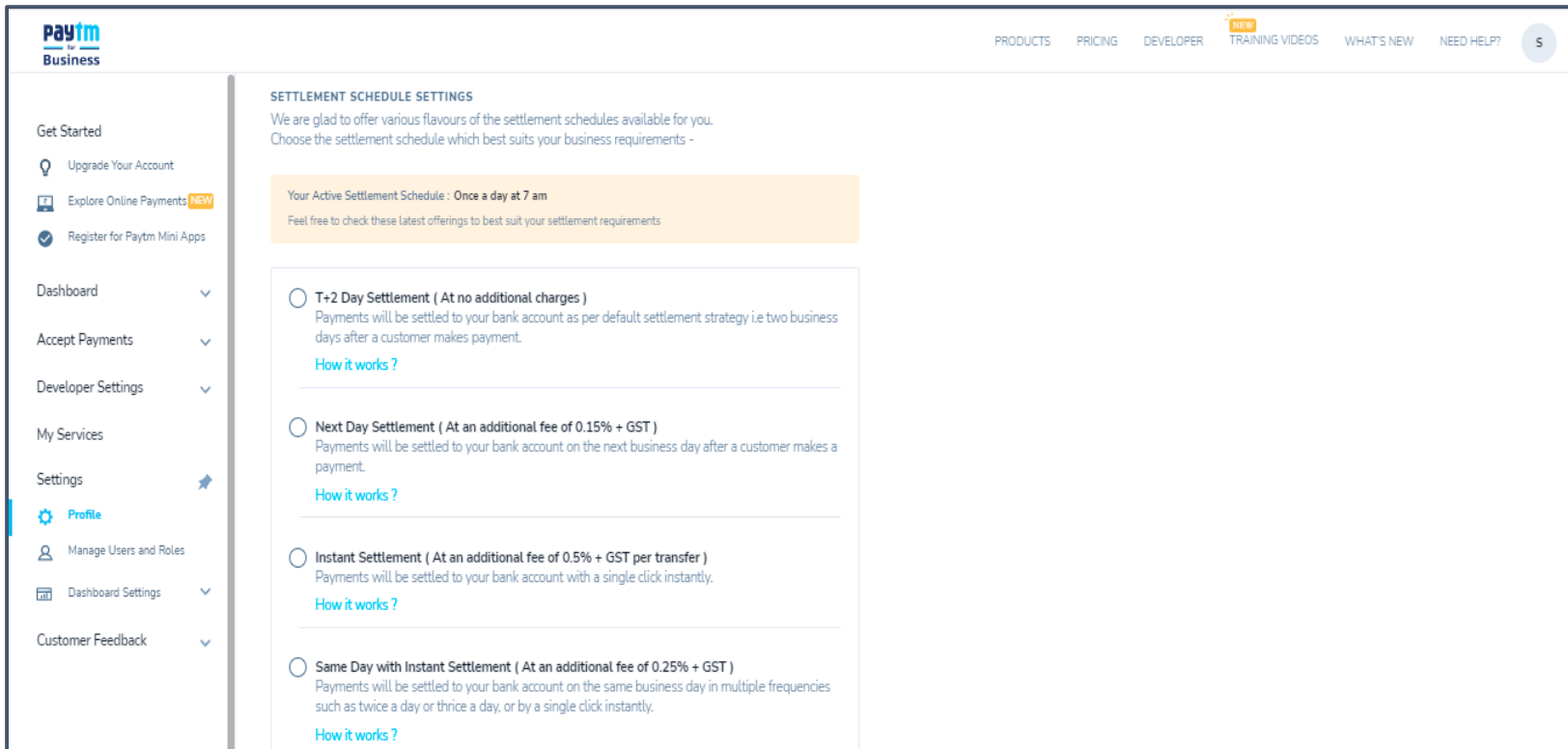
Step 3: You can also view your payments limit and applicable charges for each payment instruments



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.



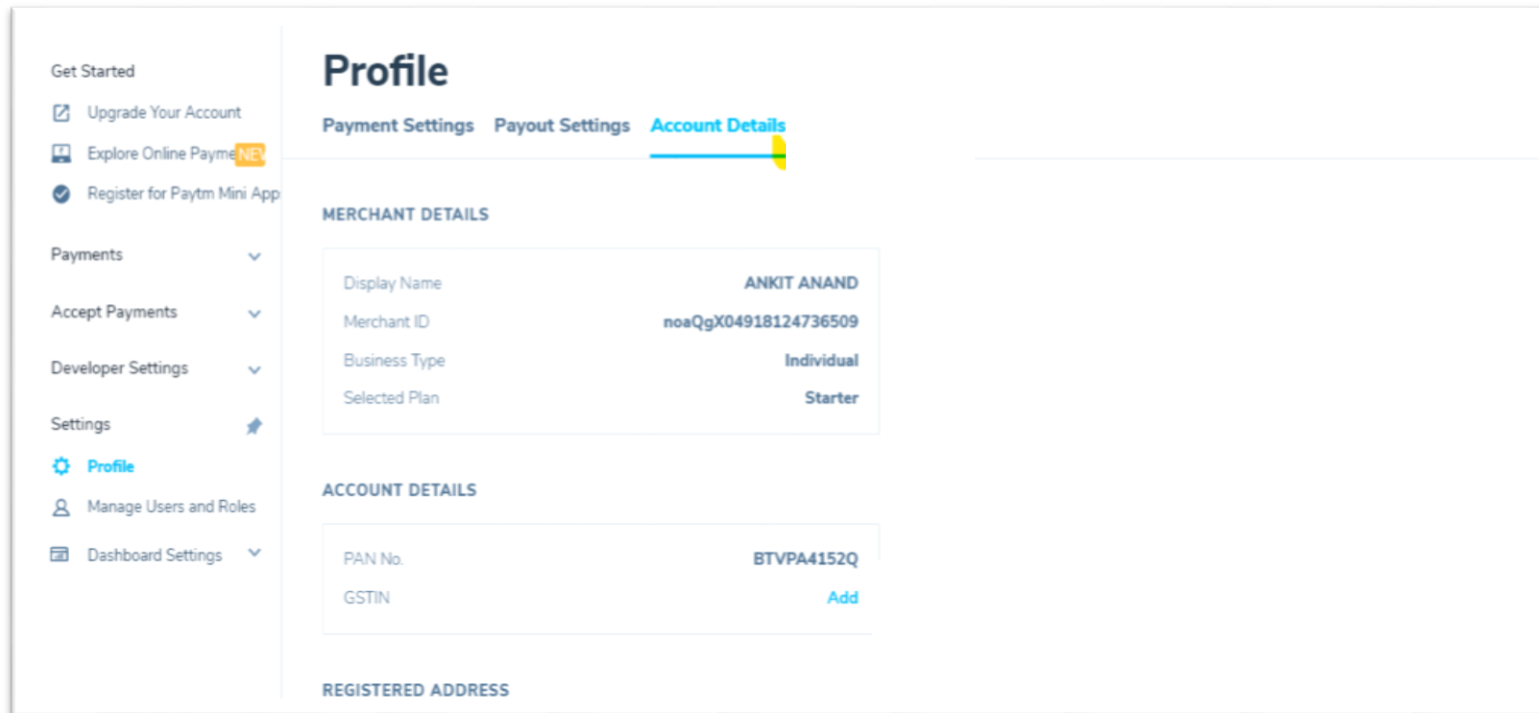
The screenshot displays the 'Settlement Schedule Settings' page in the Paytm Business dashboard. The left sidebar contains navigation links: 'Get Started' (with sub-links for 'Upgrade Your Account', 'Explore Online Payments', and 'Register for Paytm Mini Apps'), 'Dashboard', 'Accept Payments', 'Developer Settings', 'My Services', 'Settings' (highlighted with a star), 'Manage Users and Roles', 'Dashboard Settings', and 'Customer Feedback'. The main content area is titled 'SETTLEMENT SCHEDULE SETTINGS' and includes a welcome message: 'We are glad to offer various flavours of the settlement schedules available for you. Choose the settlement schedule which best suits your business requirements -'. Below this, a yellow box states 'Your Active Settlement Schedule : Once a day at 7 am' and 'Feel free to check these latest offerings to best suit your settlement requirements'. The page lists four settlement options, each with a radio button, a title, a description, and a 'How it works?' link:

- ☐ **T+2 Day Settlement (At no additional charges)**
Payments will be settled to your bank account as per default settlement strategy i.e two business days after a customer makes payment.
[How it works ?](#)
- ☐ **Next Day Settlement (At an additional fee of 0.15% + GST)**
Payments will be settled to your bank account on the next business day after a customer makes a payment.
[How it works ?](#)
- ☐ **Instant Settlement (At an additional fee of 0.5% + GST per transfer)**
Payments will be settled to your bank account with a single click instantly.
[How it works ?](#)
- ☐ **Same Day with Instant Settlement (At an additional fee of 0.25% + GST)**
Payments will be settled to your bank account on the same business day in multiple frequencies such as twice a day or thrice a day, or by a single click instantly.
[How it works ?](#)

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



The screenshot shows the 'Profile' page in the Paytm merchant dashboard. The left sidebar contains navigation options: 'Get Started' (with sub-items 'Upgrade Your Account', 'Explore Online Payments', and 'Register for Paytm Mini App'), 'Payments', 'Accept Payments', 'Developer Settings', 'Settings' (with 'Profile' selected), 'Manage Users and Roles', and 'Dashboard Settings'. The main content area is titled 'Profile' and has three tabs: 'Payment Settings', 'Payout Settings', and 'Account Details' (which is active). Below the tabs, there are three sections: 'MERCHANT DETAILS' showing 'Display Name' (ANKIT ANAND), 'Merchant ID' (noaQgX04918124736509), 'Business Type' (Individual), and 'Selected Plan' (Starter); 'ACCOUNT DETAILS' showing 'PAN No.' (BTVPA4152Q) and 'GSTIN' (with an 'Add' link); and 'REGISTERED ADDRESS'.

MERCHANT DETAILS	
Display Name	ANKIT ANAND
Merchant ID	noaQgX04918124736509
Business Type	Individual
Selected Plan	Starter

ACCOUNT DETAILS	
PAN No.	BTVPA4152Q
GSTIN	Add

REGISTERED ADDRESS

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

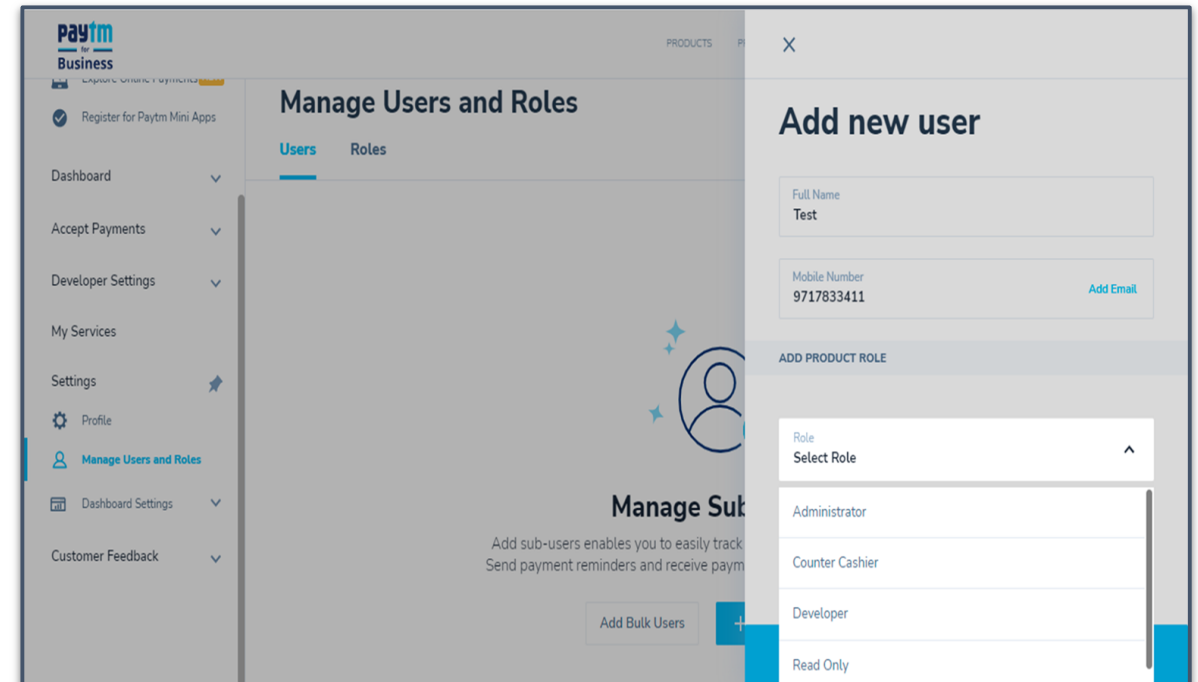
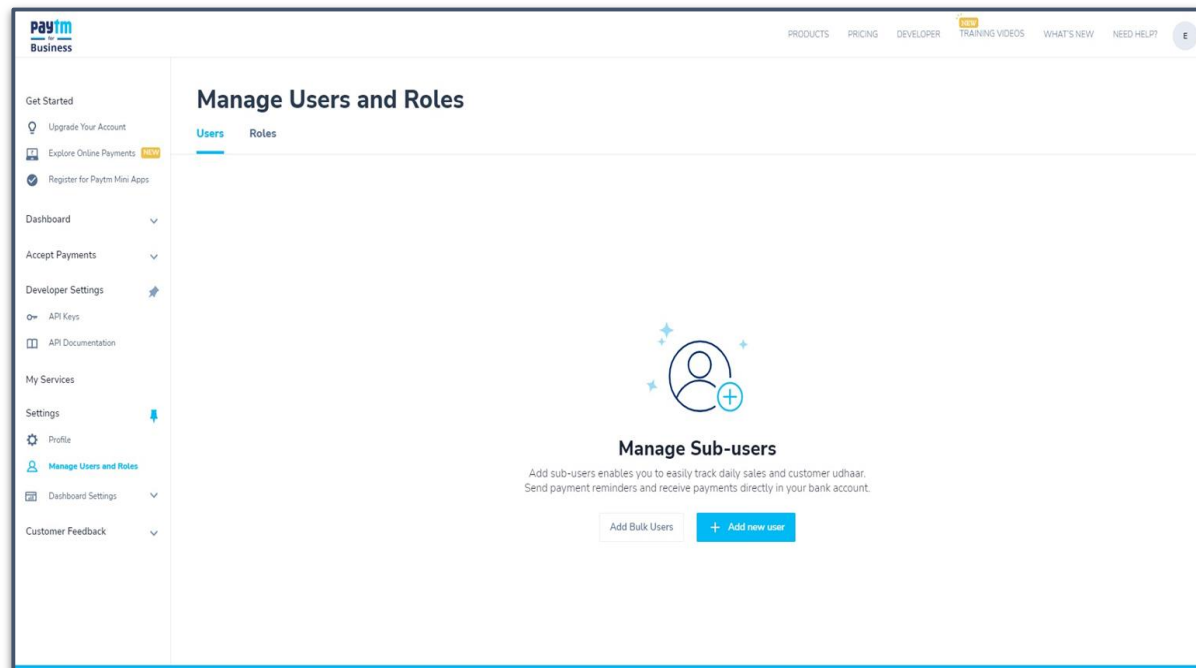
Step 3: Click on 'Add user' to complete the process

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

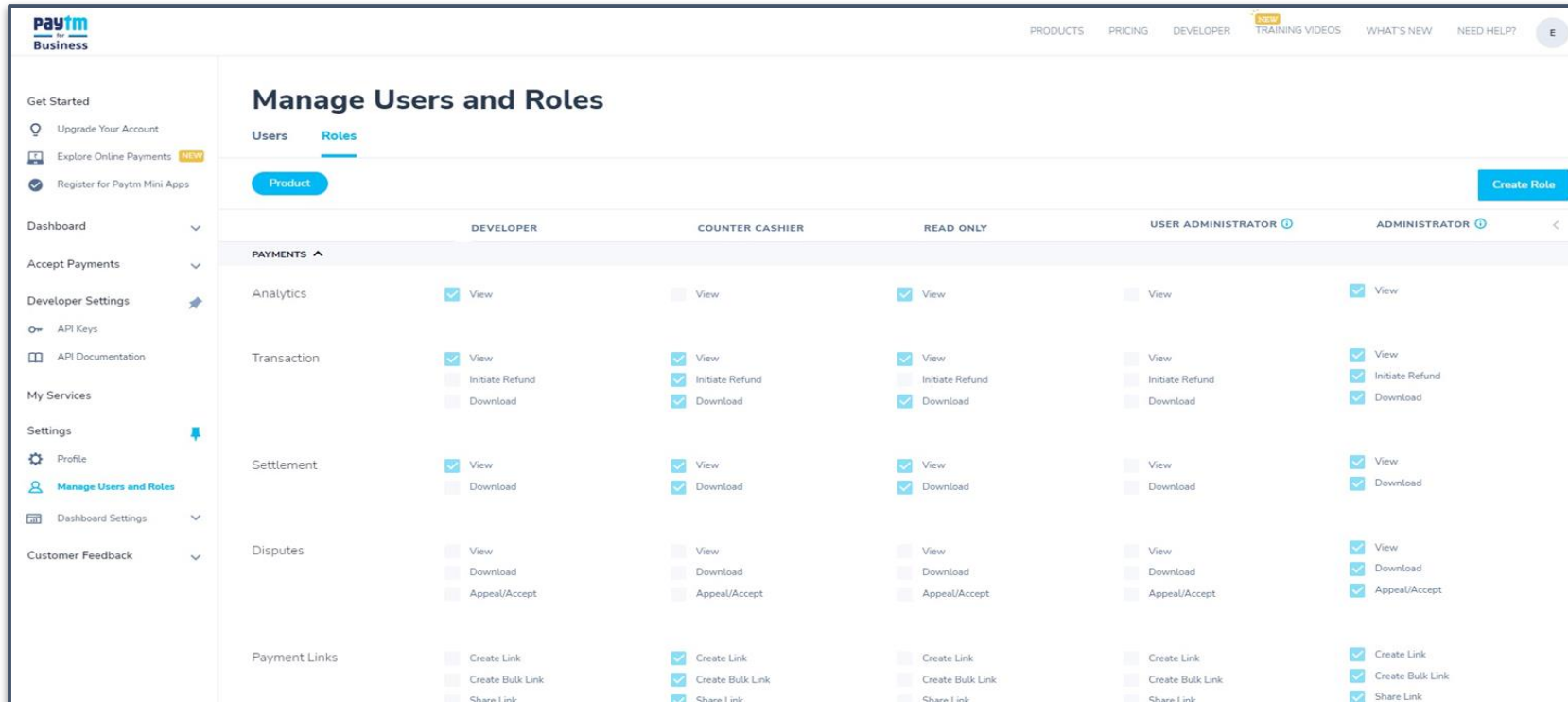
Step 1: Click on 'Roles' under Manage Users and Roles

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'

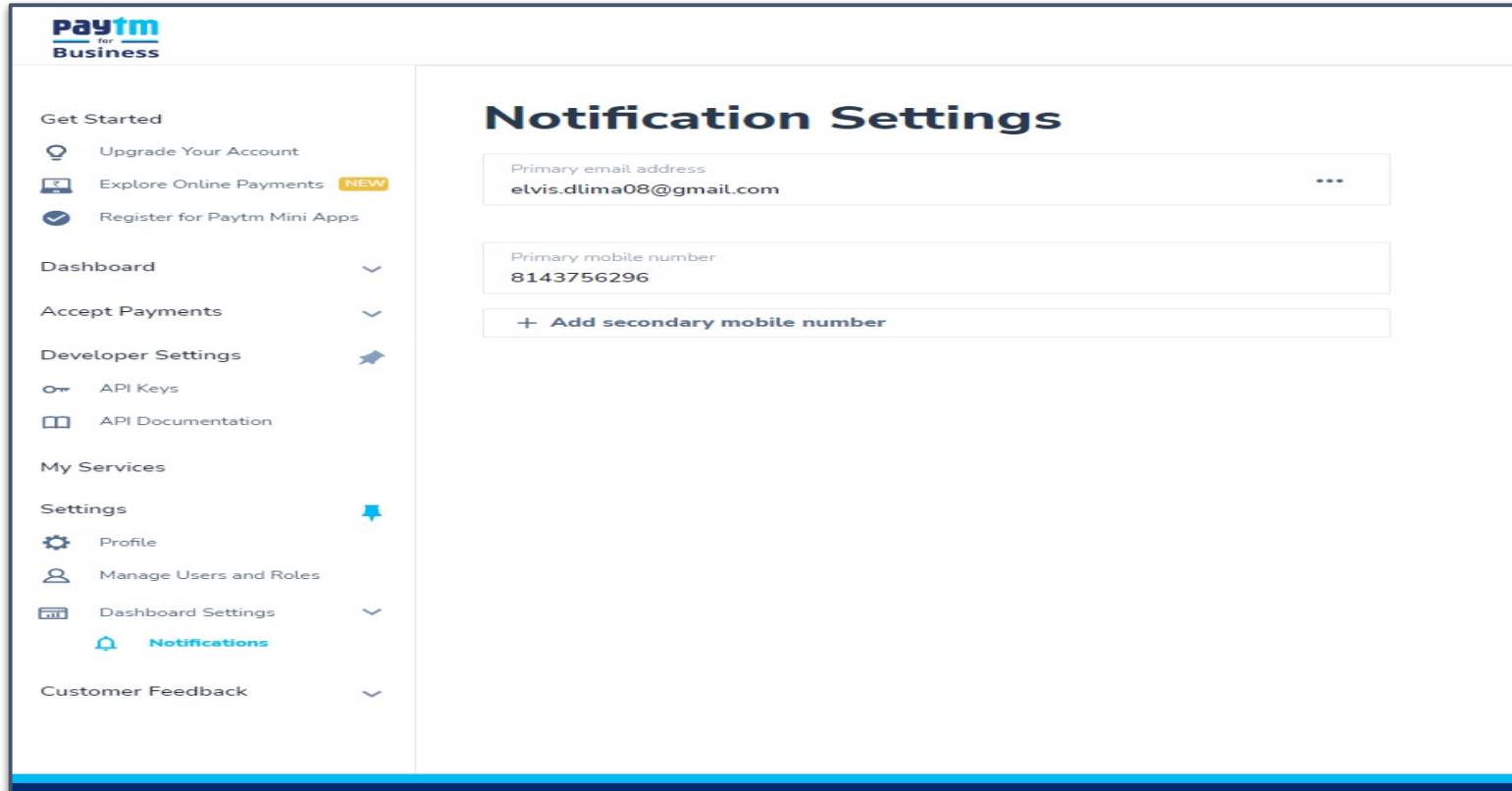


The screenshot displays the 'Manage Users and Roles' interface in the Paytm Business dashboard. The 'Roles' tab is selected, showing a table of permissions for different roles. The table has columns for Product, Developer, Counter Cashier, Read Only, User Administrator, and Administrator. The rows represent different features: Analytics, Transaction, Settlement, Disputes, and Payment Links. Each cell in the table contains a checkbox and a label indicating the permission status for that role and feature. A 'Create Role' button is located in the top right corner of the table area.

Product	Developer	COUNTER CASHIER	READ ONLY	USER ADMINISTRATOR	ADMINISTRATOR
Analytics	<input checked="" type="checkbox"/> View	<input type="checkbox"/> View	<input checked="" type="checkbox"/> View	<input type="checkbox"/> View	<input checked="" type="checkbox"/> View
Transaction	<input checked="" type="checkbox"/> View <input type="checkbox"/> Initiate Refund <input type="checkbox"/> Download	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Initiate Refund <input checked="" type="checkbox"/> Download	<input checked="" type="checkbox"/> View <input type="checkbox"/> Initiate Refund <input checked="" type="checkbox"/> Download	<input type="checkbox"/> View <input type="checkbox"/> Initiate Refund <input type="checkbox"/> Download	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Initiate Refund <input checked="" type="checkbox"/> Download
Settlement	<input checked="" type="checkbox"/> View <input type="checkbox"/> Download	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Download	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Download	<input type="checkbox"/> View <input type="checkbox"/> Download	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Download
Disputes	<input type="checkbox"/> View <input type="checkbox"/> Download <input type="checkbox"/> Appeal/Accept	<input type="checkbox"/> View <input type="checkbox"/> Download <input type="checkbox"/> Appeal/Accept	<input type="checkbox"/> View <input type="checkbox"/> Download <input type="checkbox"/> Appeal/Accept	<input type="checkbox"/> View <input type="checkbox"/> Download <input type="checkbox"/> Appeal/Accept	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Download <input checked="" type="checkbox"/> Appeal/Accept
Payment Links	<input type="checkbox"/> Create Link <input type="checkbox"/> Create Bulk Link <input type="checkbox"/> Share Link	<input checked="" type="checkbox"/> Create Link <input checked="" type="checkbox"/> Create Bulk Link <input checked="" type="checkbox"/> Share Link	<input type="checkbox"/> Create Link <input type="checkbox"/> Create Bulk Link <input type="checkbox"/> Share Link	<input type="checkbox"/> Create Link <input type="checkbox"/> Create Bulk Link <input type="checkbox"/> Share Link	<input checked="" type="checkbox"/> Create Link <input checked="" type="checkbox"/> Create Bulk Link <input checked="" type="checkbox"/> Share Link

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.



The screenshot displays the 'Notification Settings' page within the Paytm Business dashboard. On the left, a sidebar menu lists various sections: 'Get Started' (with links to 'Upgrade Your Account', 'Explore Online Payments' marked as 'NEW', and 'Register for Paytm Mini Apps'), 'Dashboard', 'Accept Payments', 'Developer Settings' (with links to 'API Keys' and 'API Documentation'), 'My Services', 'Settings' (with links to 'Profile', 'Manage Users and Roles', 'Dashboard Settings', and 'Notifications' which is highlighted), and 'Customer Feedback'. The main content area is titled 'Notification Settings' and contains three input fields. The first field, 'Primary email address', shows 'elvis.dlima08@gmail.com' with an edit icon (three dots) to its right. The second field, 'Primary mobile number', shows '8143756296'. Below this is a button labeled '+ Add secondary mobile number'.

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

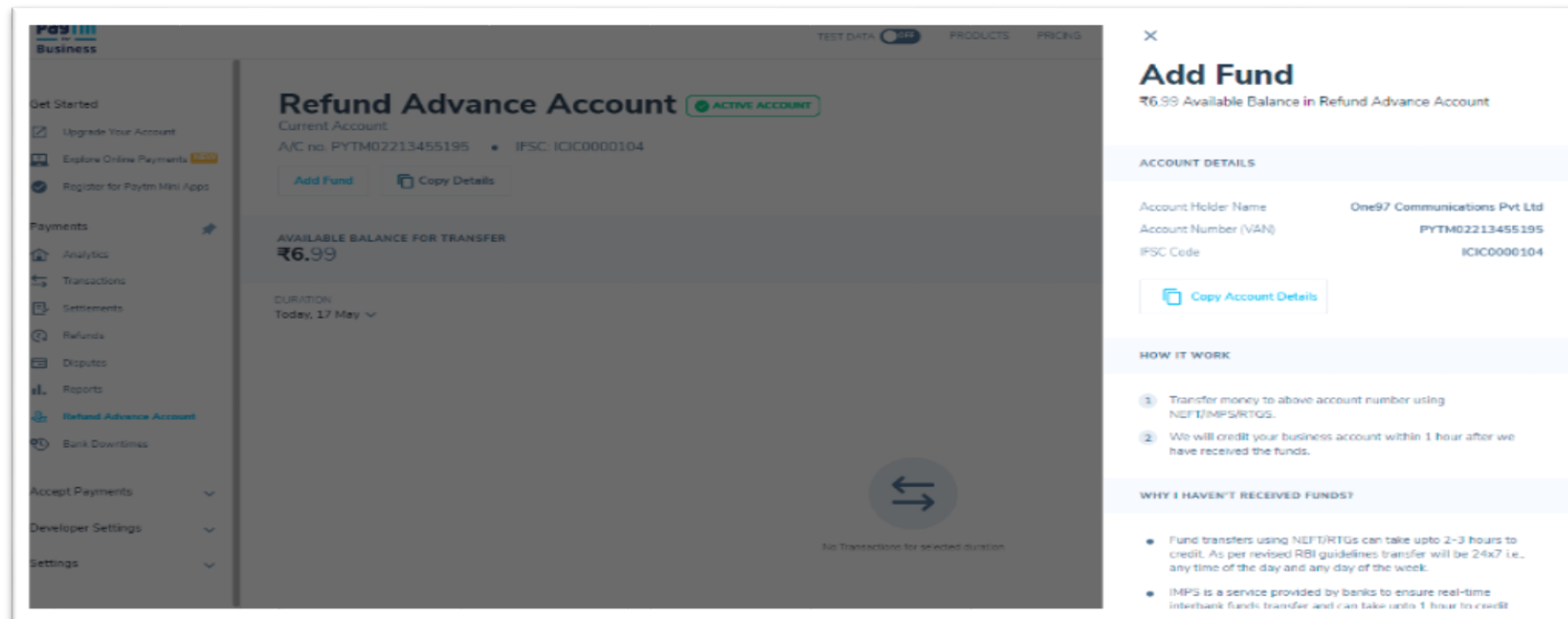
Step 3: Under account screen you will see the Account details, Account status, How does it work section and CTA to add funds

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

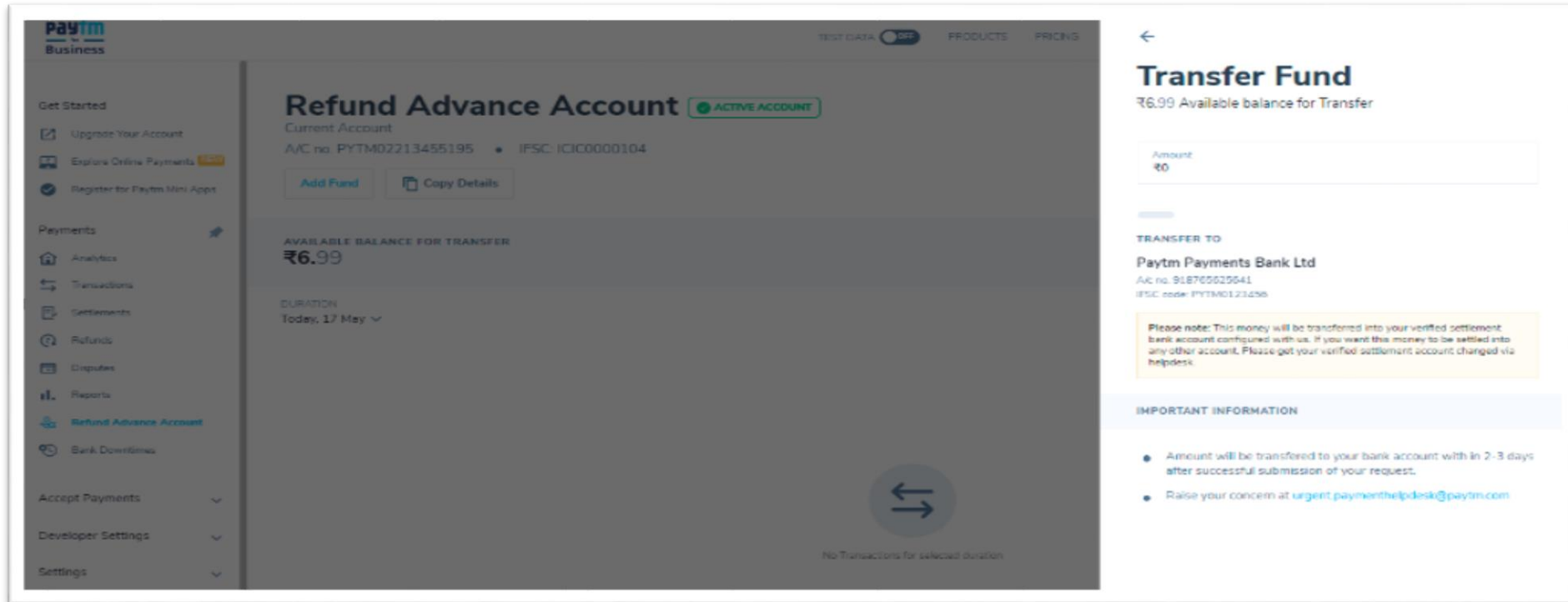
Step 1: Click on 'Transfer to Bank' option to proceed with withdrawal

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

