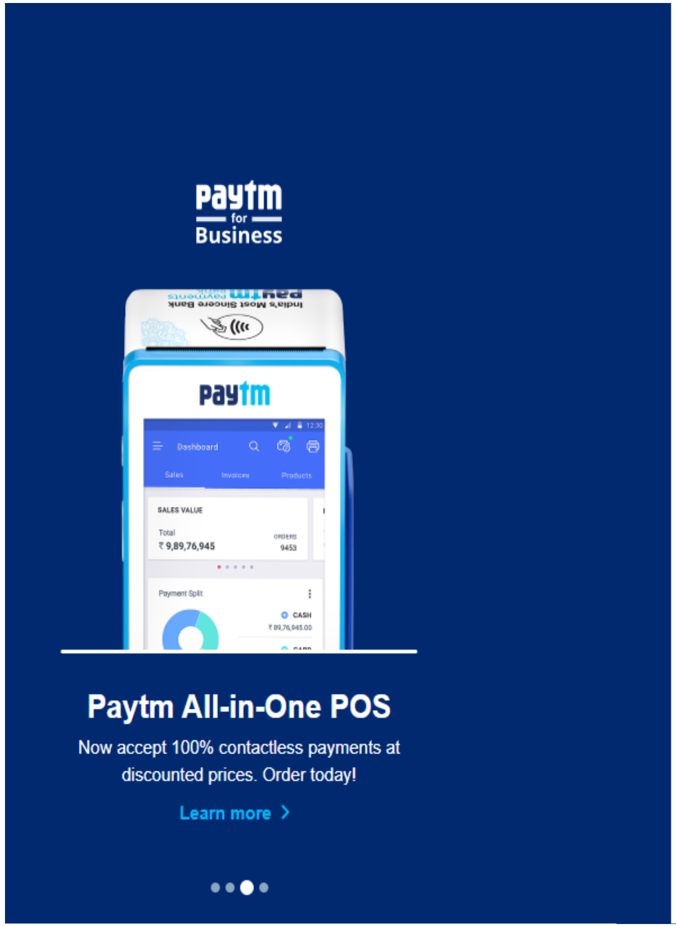
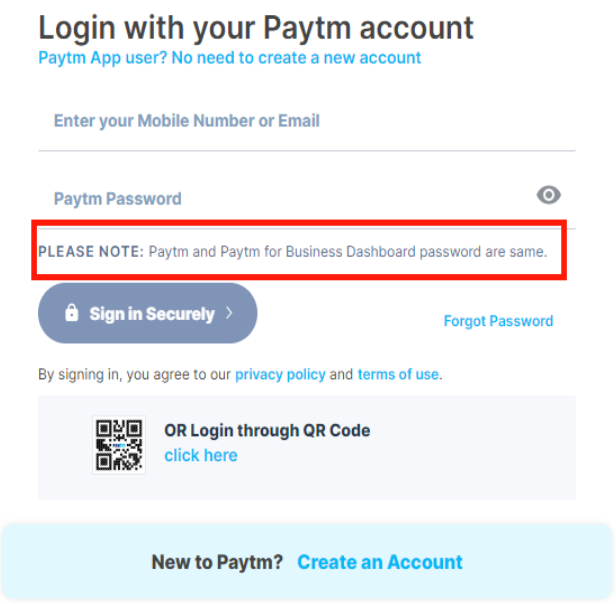
Unified Merchant Panel/Dashboard Guide

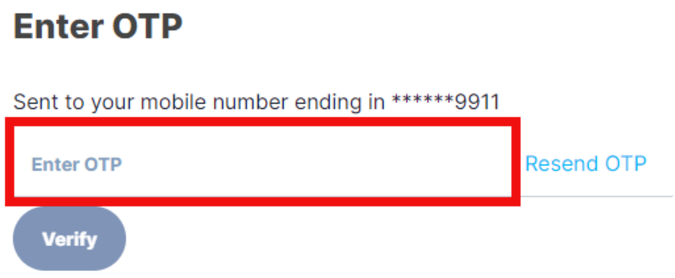
Content

How to login to UMP Dashboard

- Login to the dashboard (https://dashboard.paytmpayments.com/login/) with the registered mobile number/email ID and Password. Enter OTP after entering the credentials.
- If the email ID/mobile number is already registered with Paytm then the password will remain the same.
- If not registered with Paytm you will receive a link to reset the password from care@paytmpayments.com.







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

- If not registered with Paytm with shared email ID/Mobile number:

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

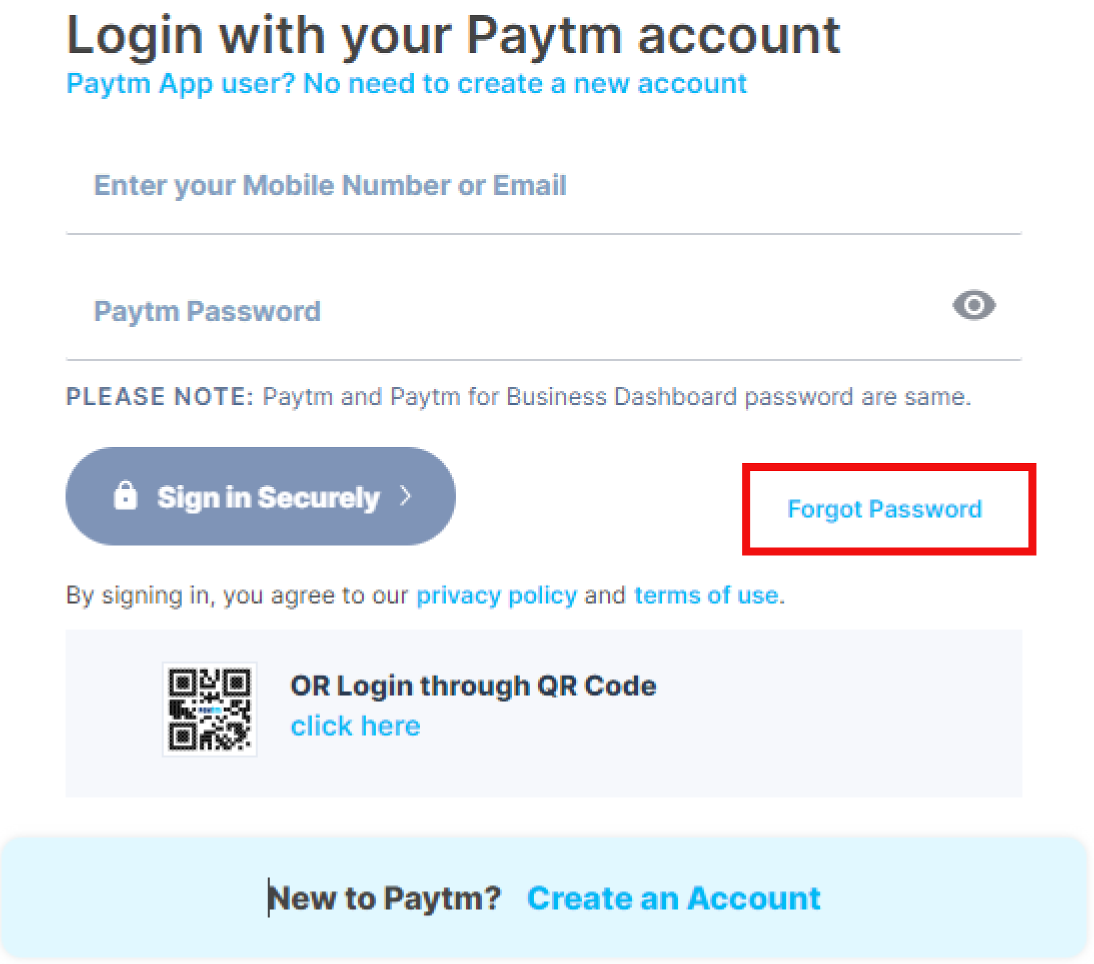
- If email ID/mobile number is already registered with Paytm:

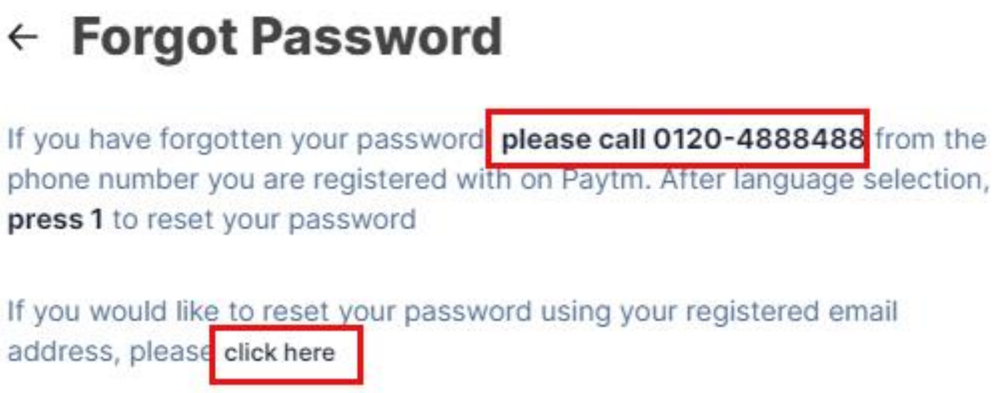
  Please click on forgot password option to reset the password.

How to reset the password

- Mobile number: Please call 120-4888488 with your Paytm registered number, select your preferred language and press 1 to reset the password.
- Email ID: Please click on the option of "click here" to reset the password

How to reset the password



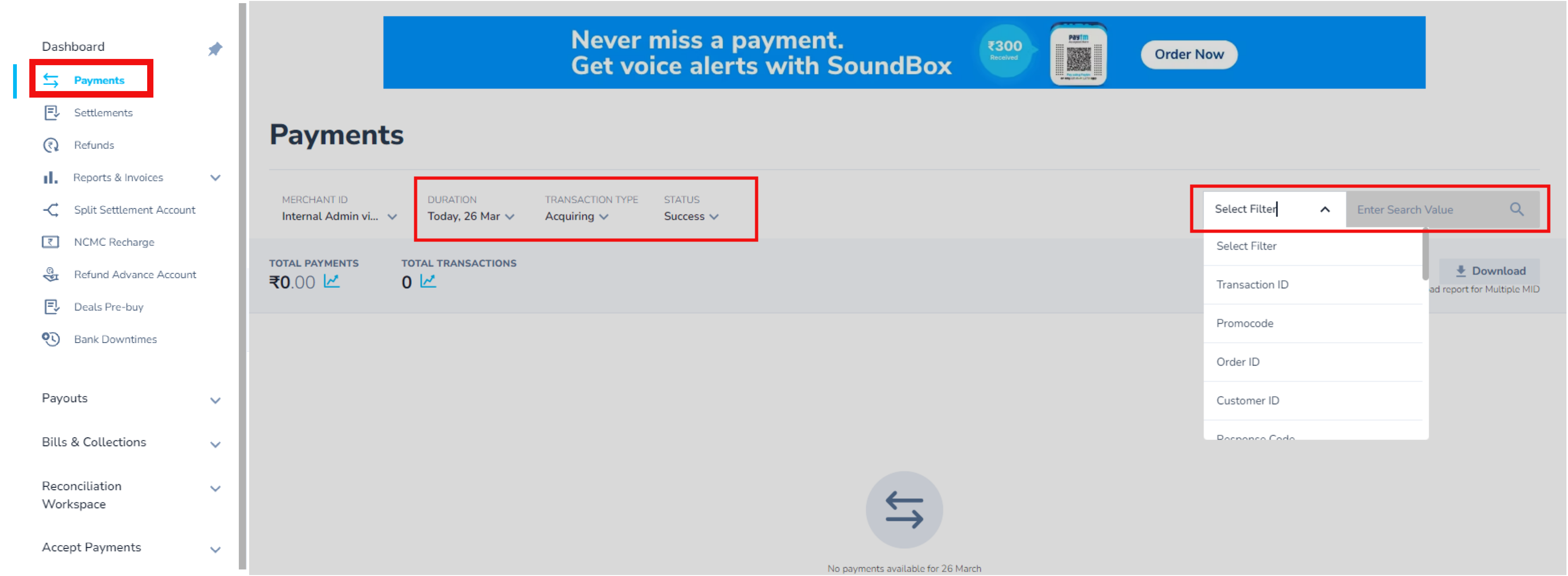


Features of Analytics

- You can see the number of payments and the 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
- You can see payment flow analysis and success rate that will help you to identify which bank/pay mode is providing the best success rate

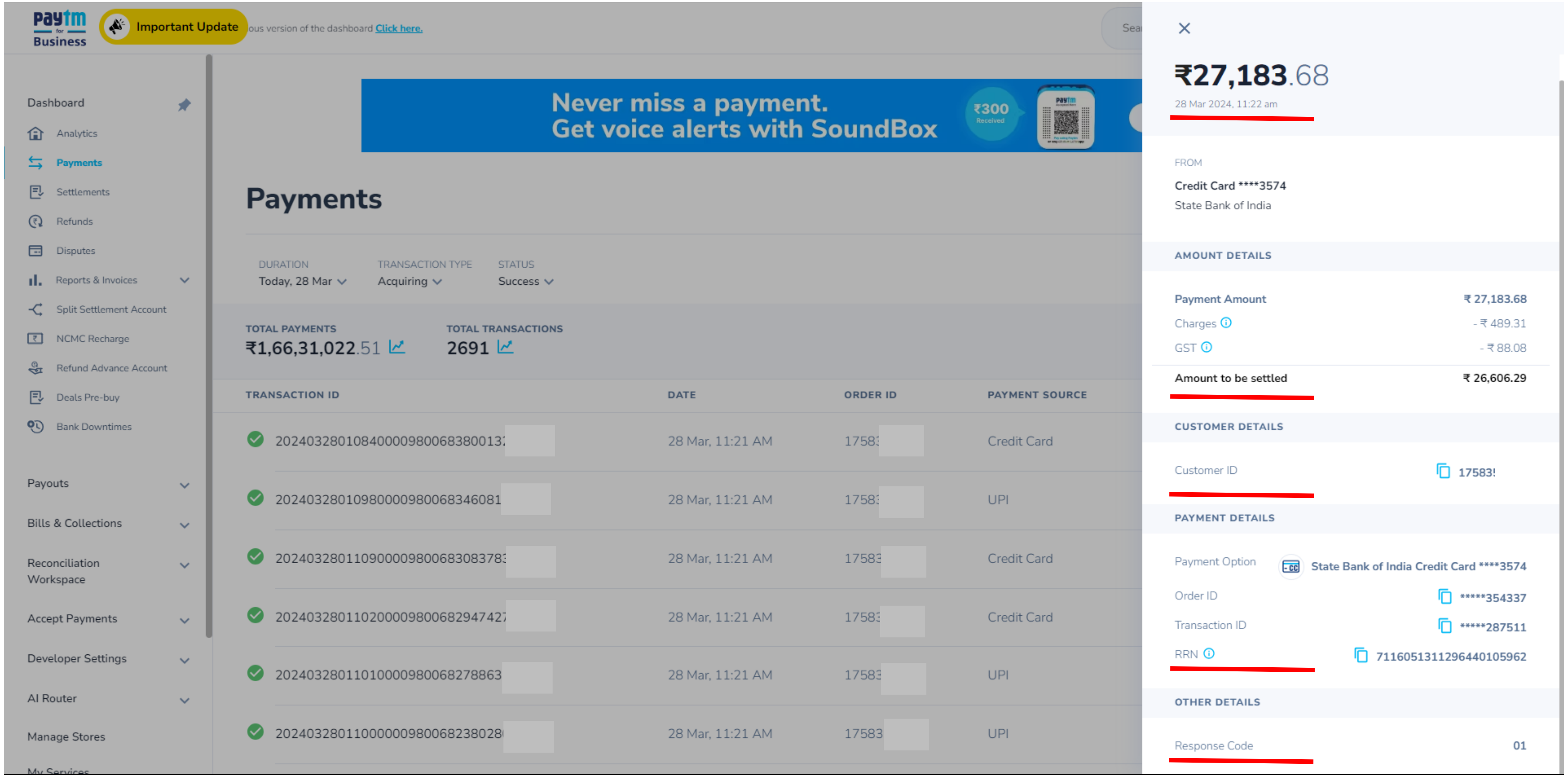
Features of Payments

- Under 'Transactions' you can see the total payments received for the selected period (from today, yesterday, this week & custom range)
- You can see the transactions with the help of Amount, Transaction ID and Order ID
- You can change the status of the 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.



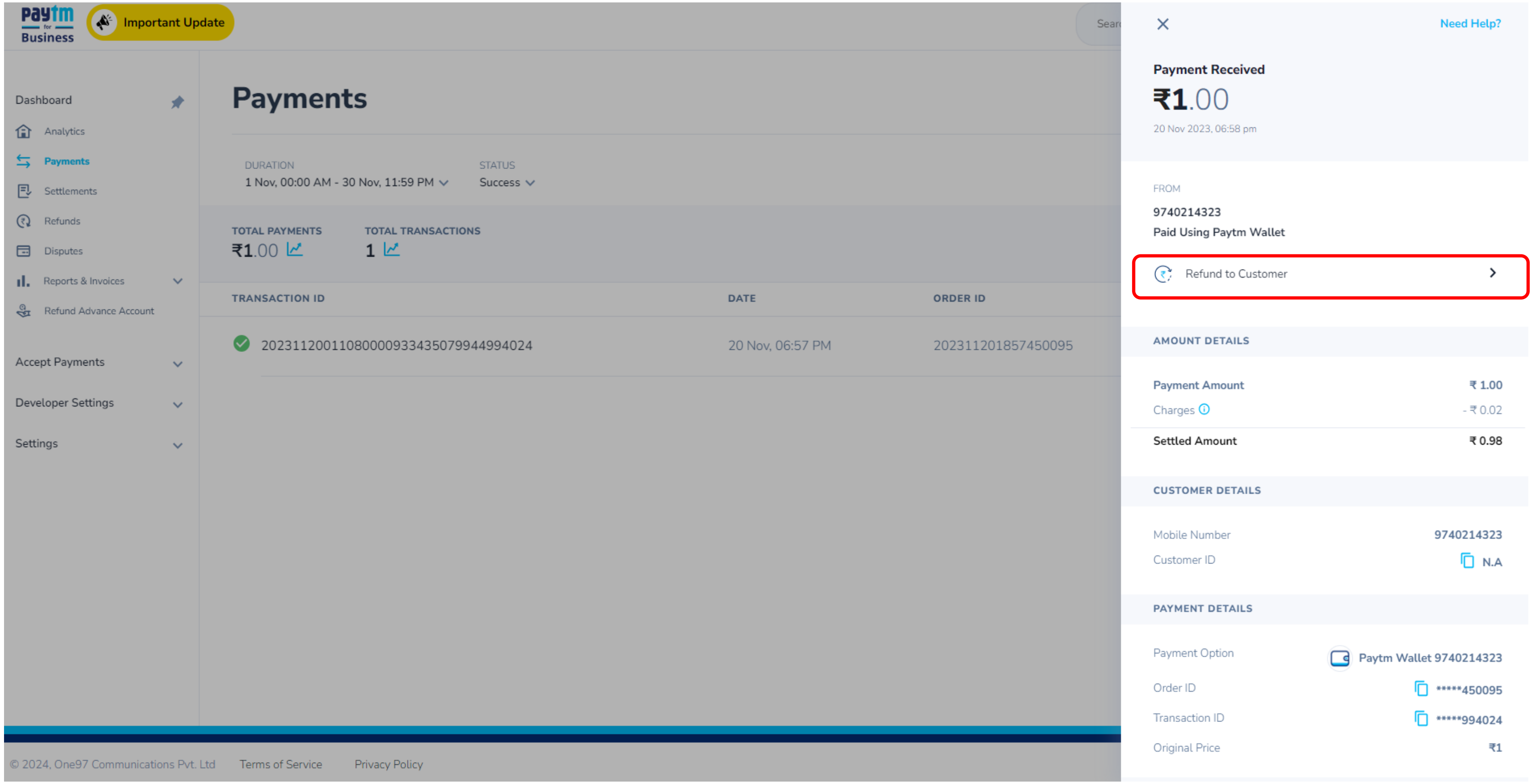
Features of Payments

- Click on a particular transaction to see the details (Amount, Amount details, Customer Details, Payment Details)



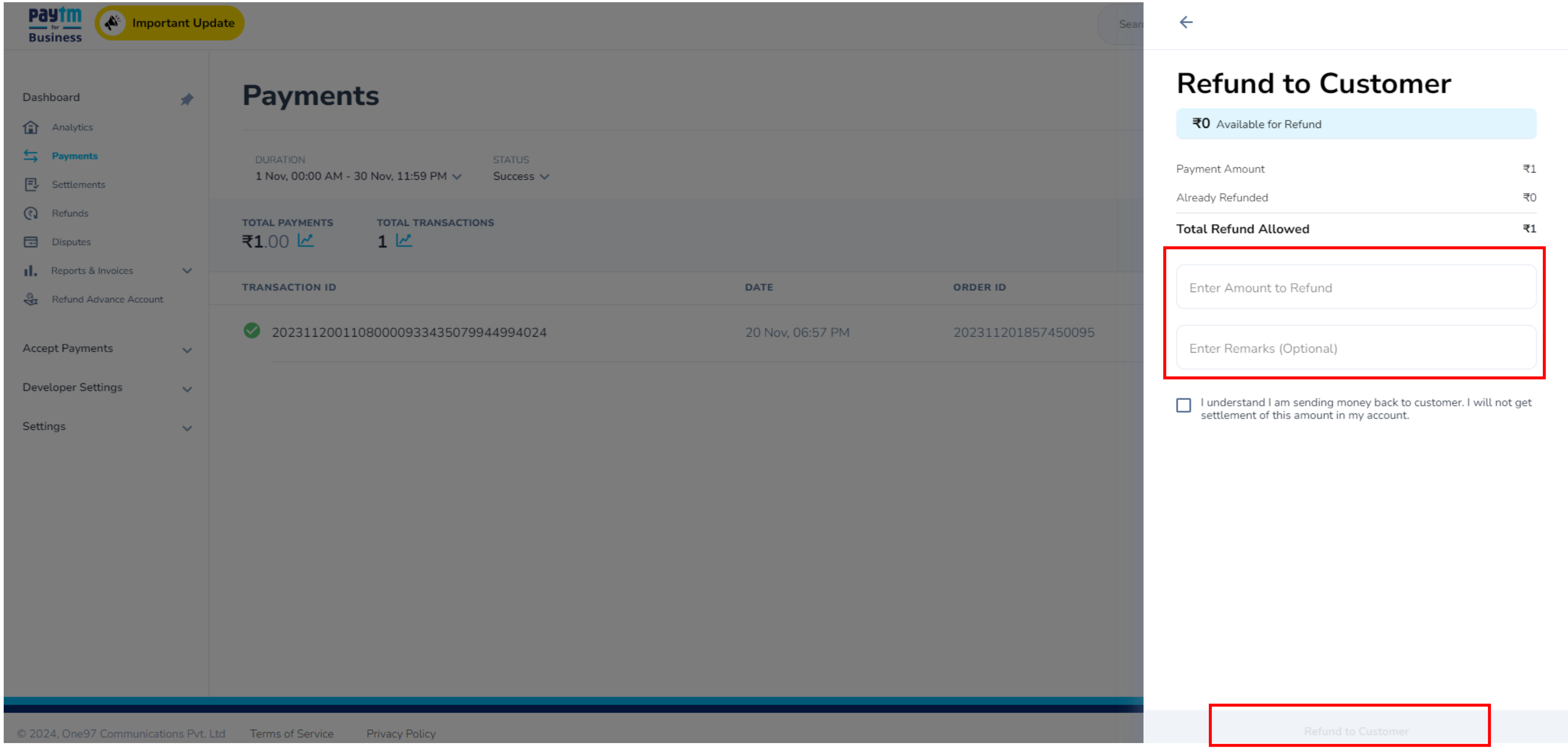
Steps to initiate Refund from Payments tab

- **Step 1:** Select the transaction you wish to refund.
- **Step 2:** Click on 'Refund to Customer' which will be visible in the middle



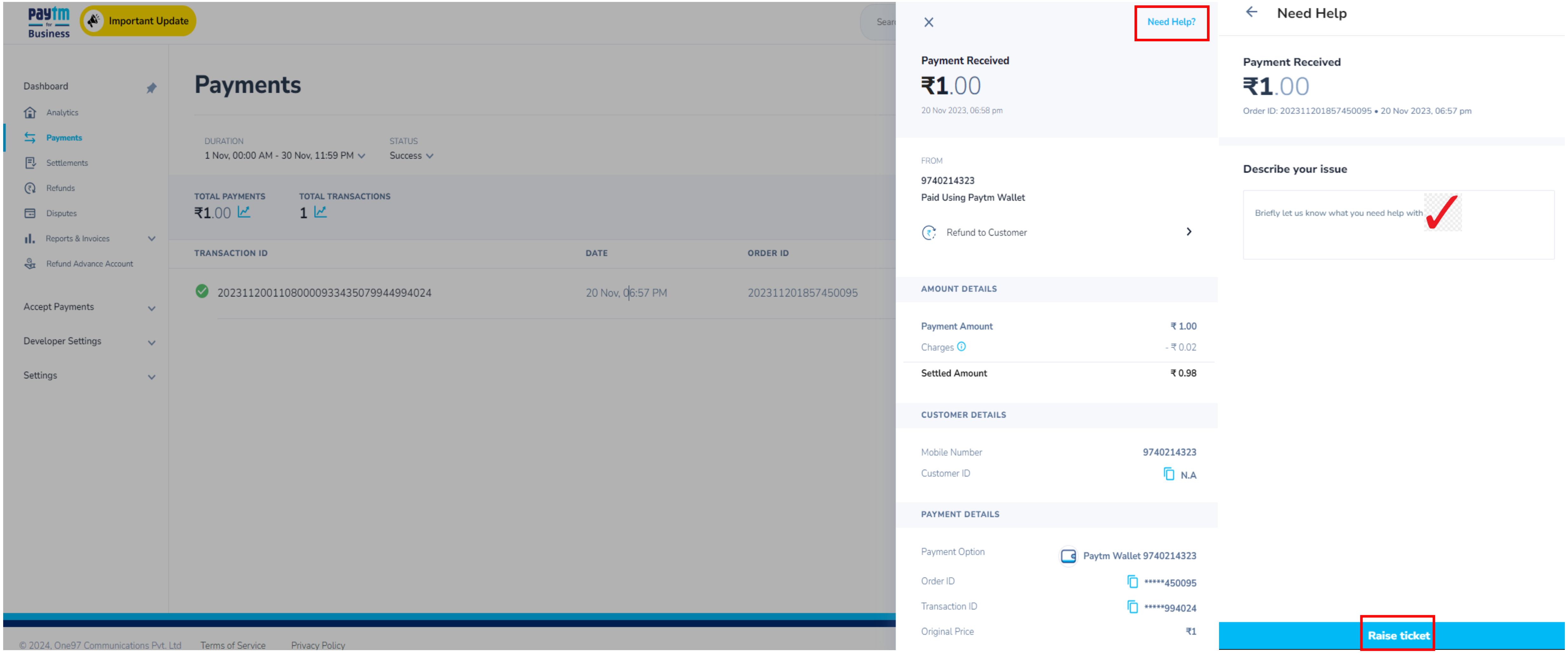
Steps to initiate Refund from Payments tab

- **Step 3:** The total refundable amount will be visible on the top
- **Step 4:** Enter the refund amount
- **Step 5:** Enter refund remarks for tracking (optional)
- **Step 6:** Click on ‘Refund to customer’ at the bottom



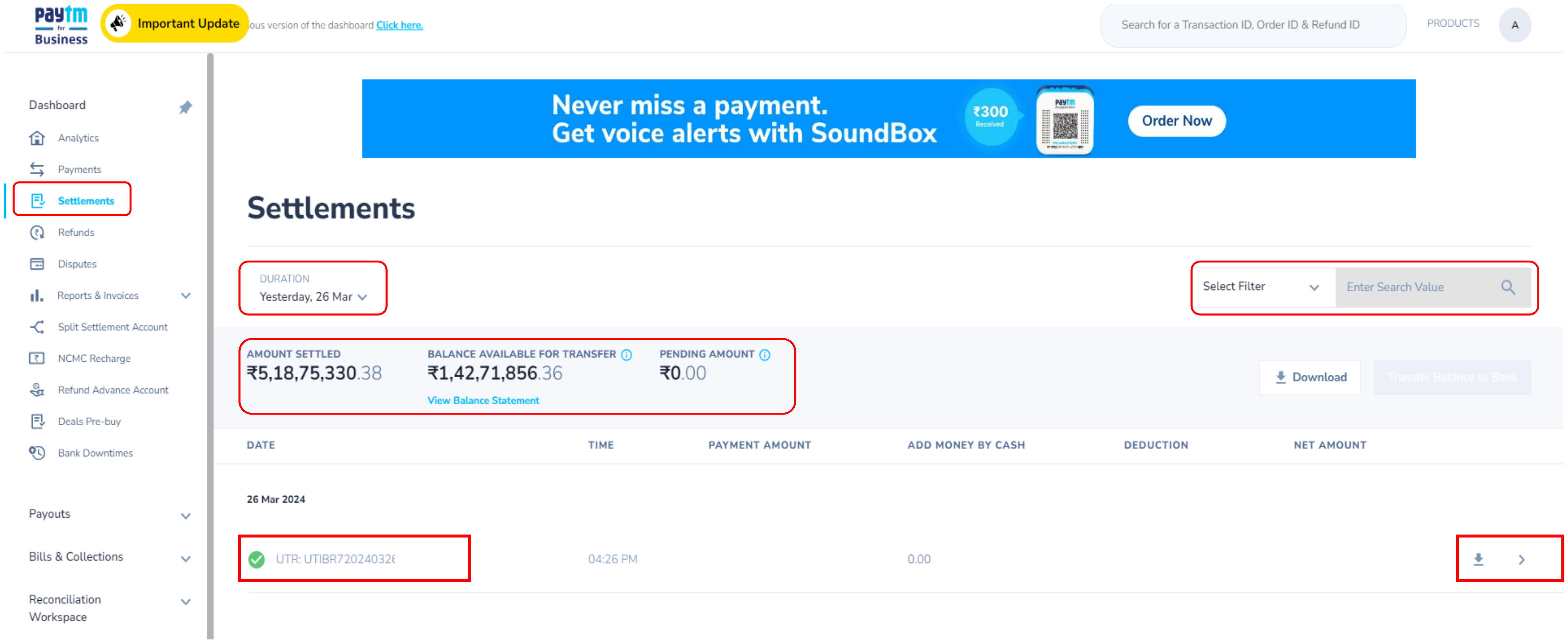
Steps to raise tickets from the Payments tab

Step 1: Select the concern related transaction
Step 2: Click on ‘Need Help?’ and a pop up will be open
Step 3: Mention the issue description and click on ‘Raise Ticket’



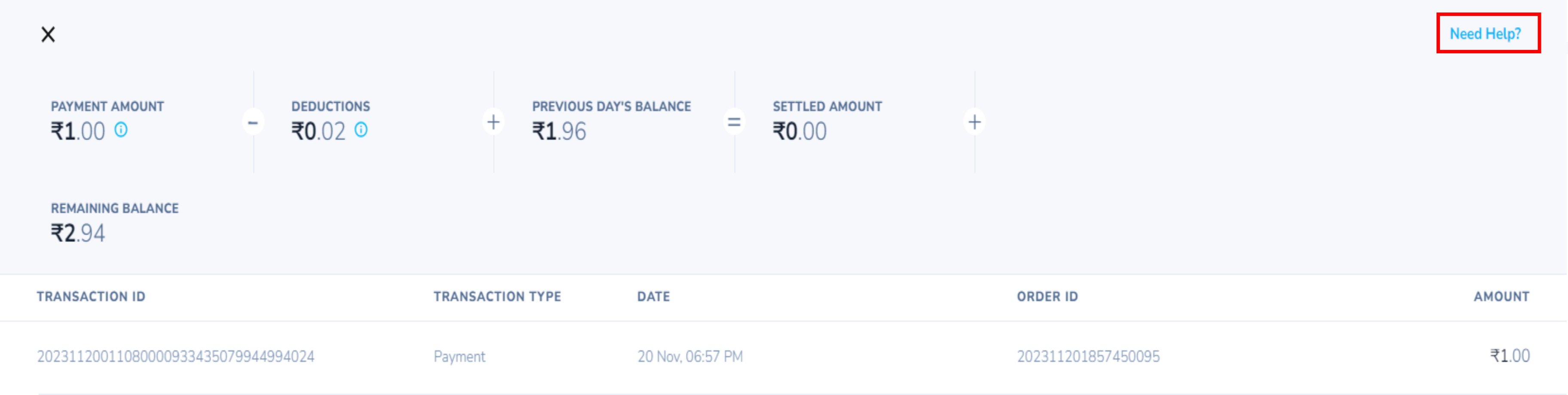
Features of Settlement

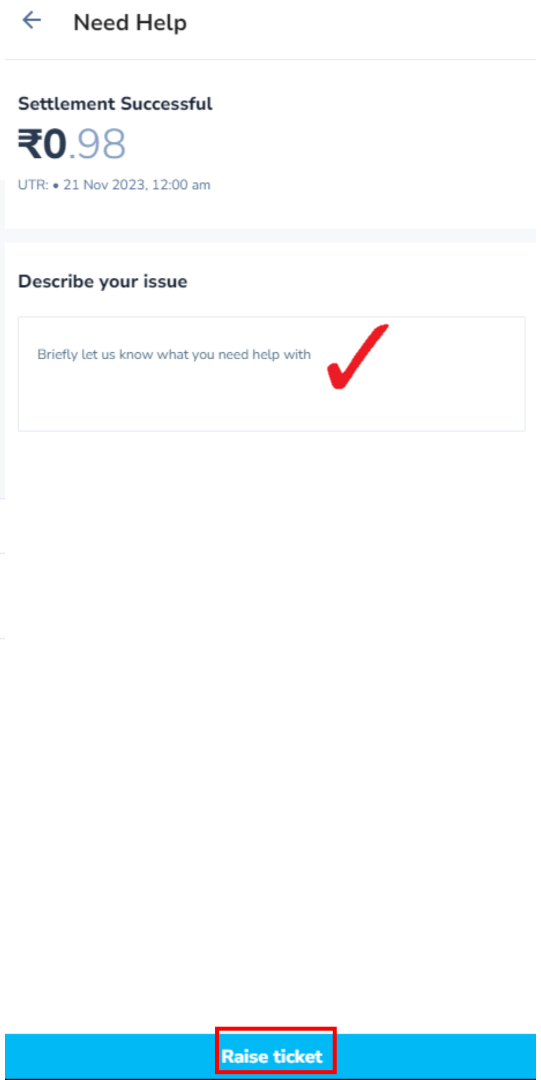
- All settled amounts of selected date/time ranges will be visible here along with the UTR number
- You can see the settlement from Today, Yesterday, This week and the Custom range by using the ‘Select filter’ option on the top right
- You can search for particular settlement details from the UTR number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



Steps to raise tickets from the Settlement tab

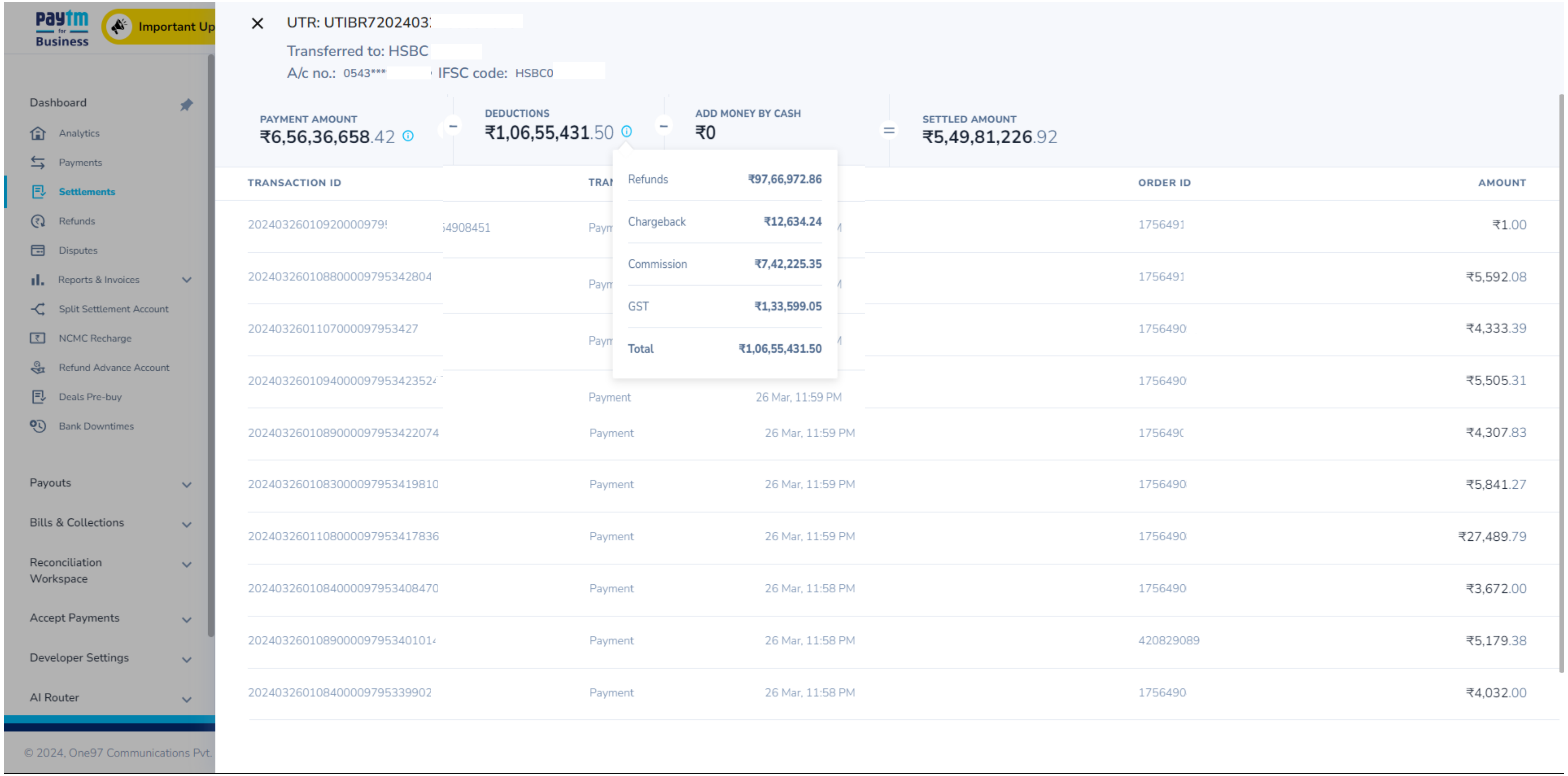
Step 1: Select the concern related Settlement
Step 2: Click on 'Need Help?' and a pop up will be open
Step 3: Mention the issue description and click on 'Raise Ticket'





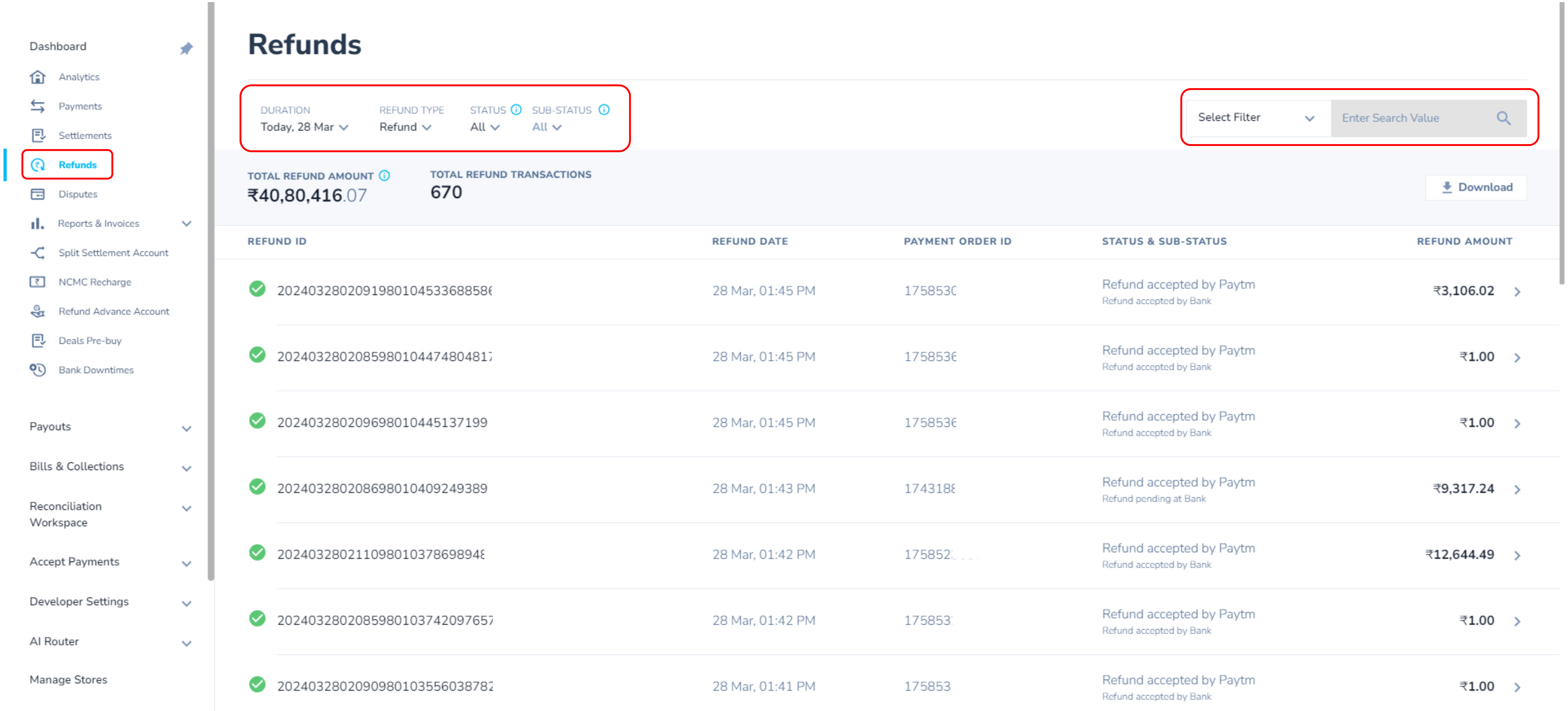
Features of Settlement

- Click on a particular settlement to see the details (UTR, Bank A/C details, Deductions and Settled Amount)



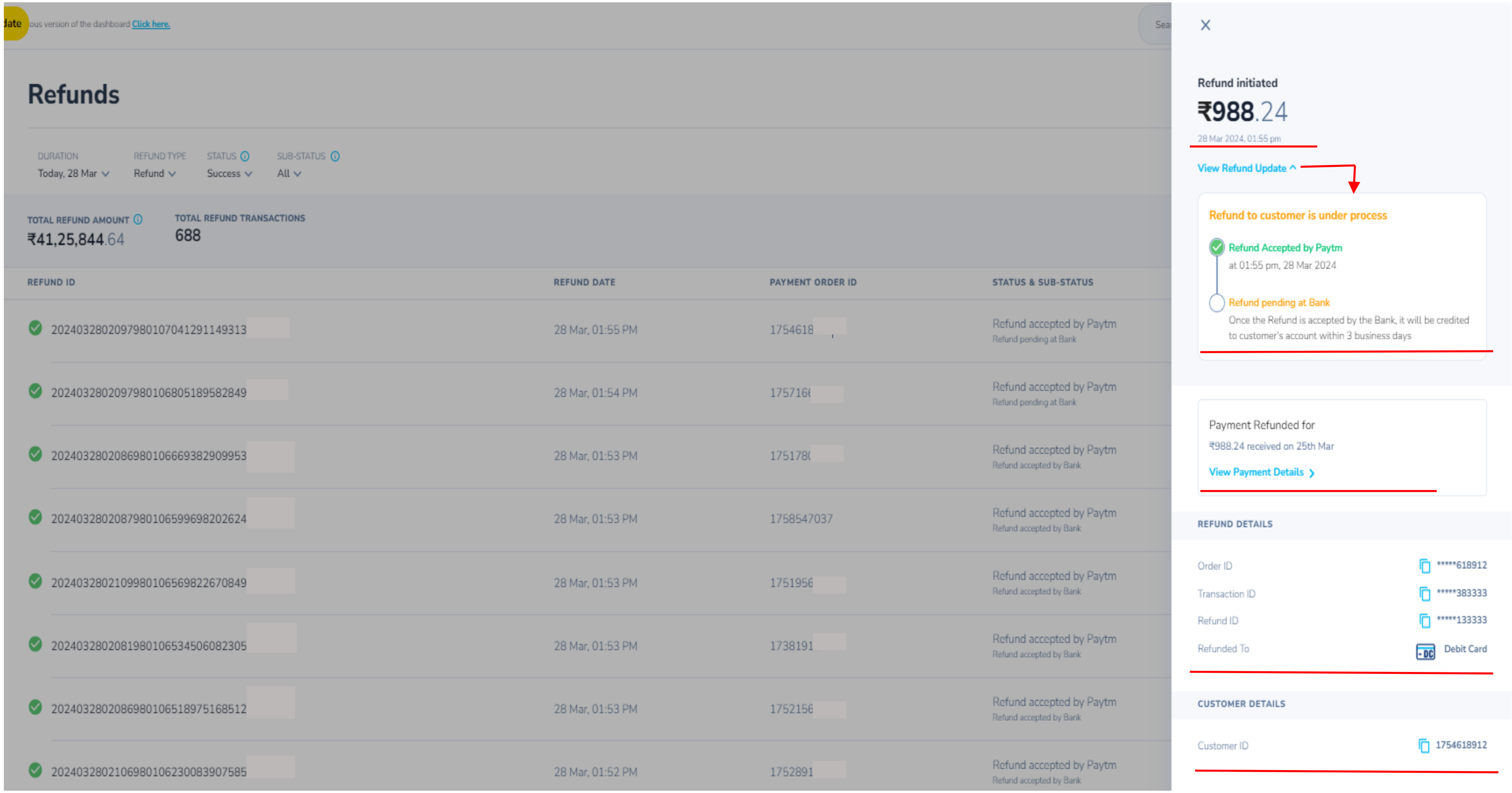
Features of Refund

- The total refund amount and number of refunds for the selected period will be visible here
- You can filter the refund details by Duration- Today, Yesterday, This week and Custom range
- You can filter refunds from here based on customer phone no, email ID, transaction ID, order ID, etc.
- You can select successful, pending or failed refunds by selecting status



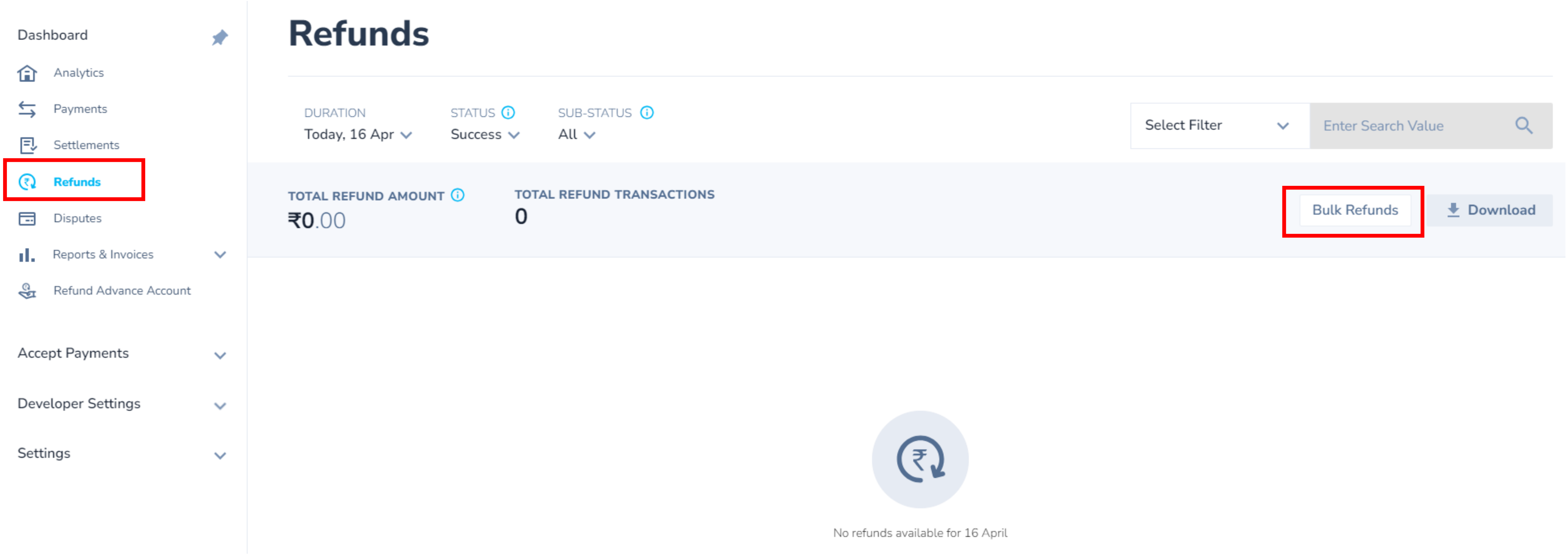
Features of Refund

- Click on a particular refund to see the details (Refund amount, date & time, status, details and payment details)



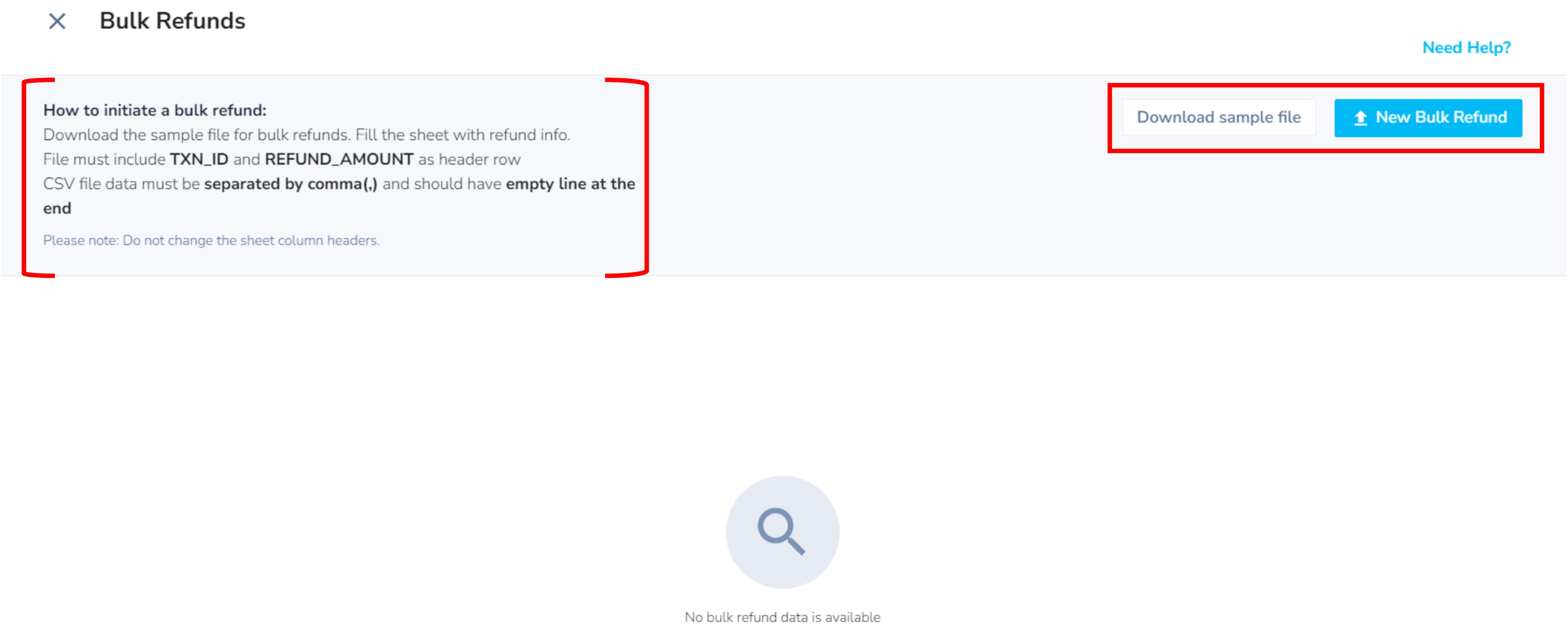
Steps to initiate Bulk Refund

Step 1: Click on bulk refund to see the process



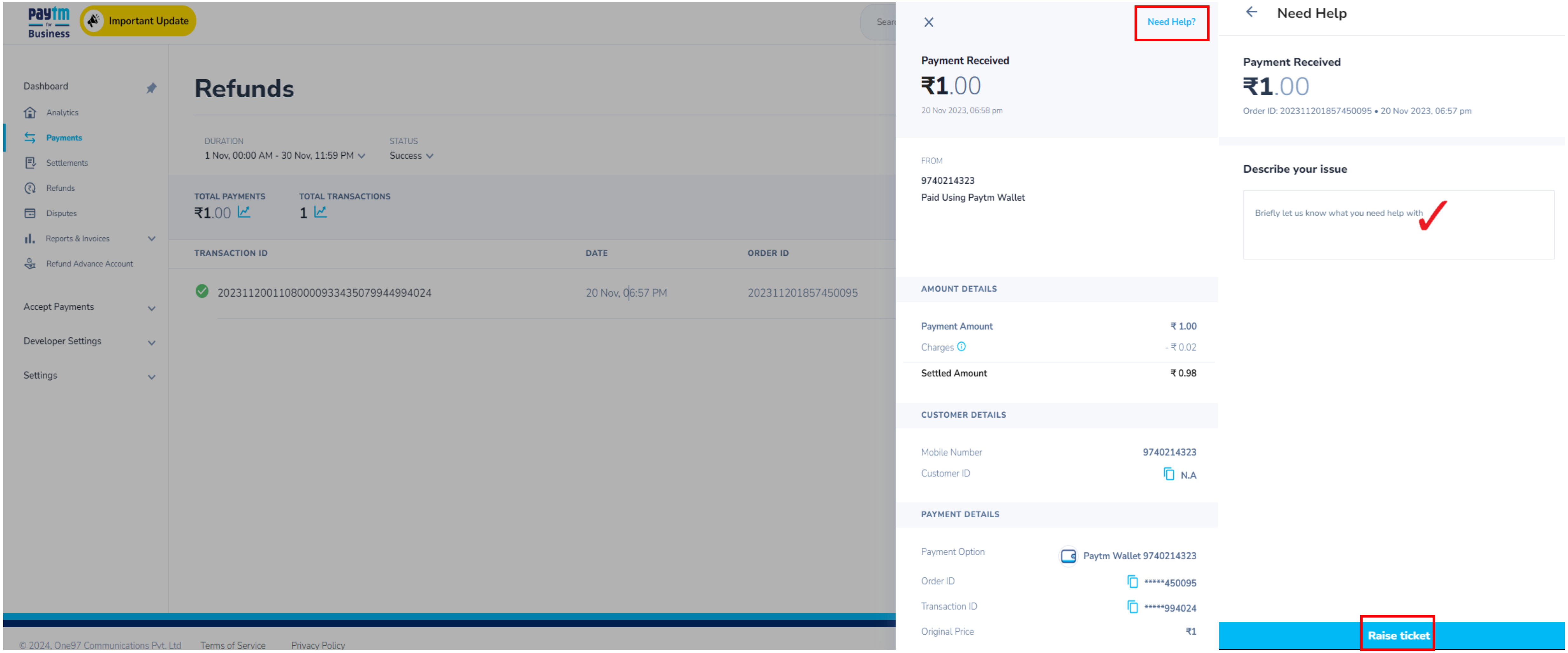
Steps to initiate Bulk Refund

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’



Steps to raise tickets from the Refunds tab

Step 1: Select the concern related Refund
Step 2: Click on ‘Need Help?’ and a pop up will be open
Step 3: Mention the issue description and click on ‘Raise Ticket’



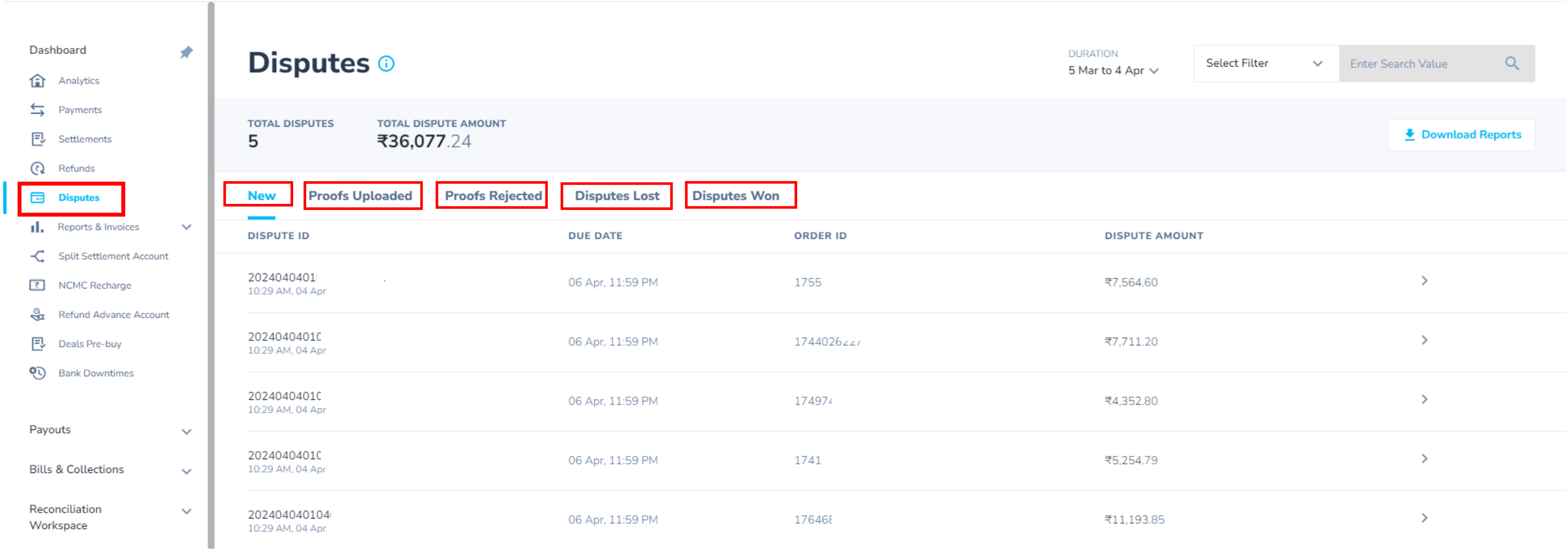
How to check the Disputes

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 its details

Step 2: Click on Respond to proceed further

Step 3: Upload the documents to clear the disputed transaction

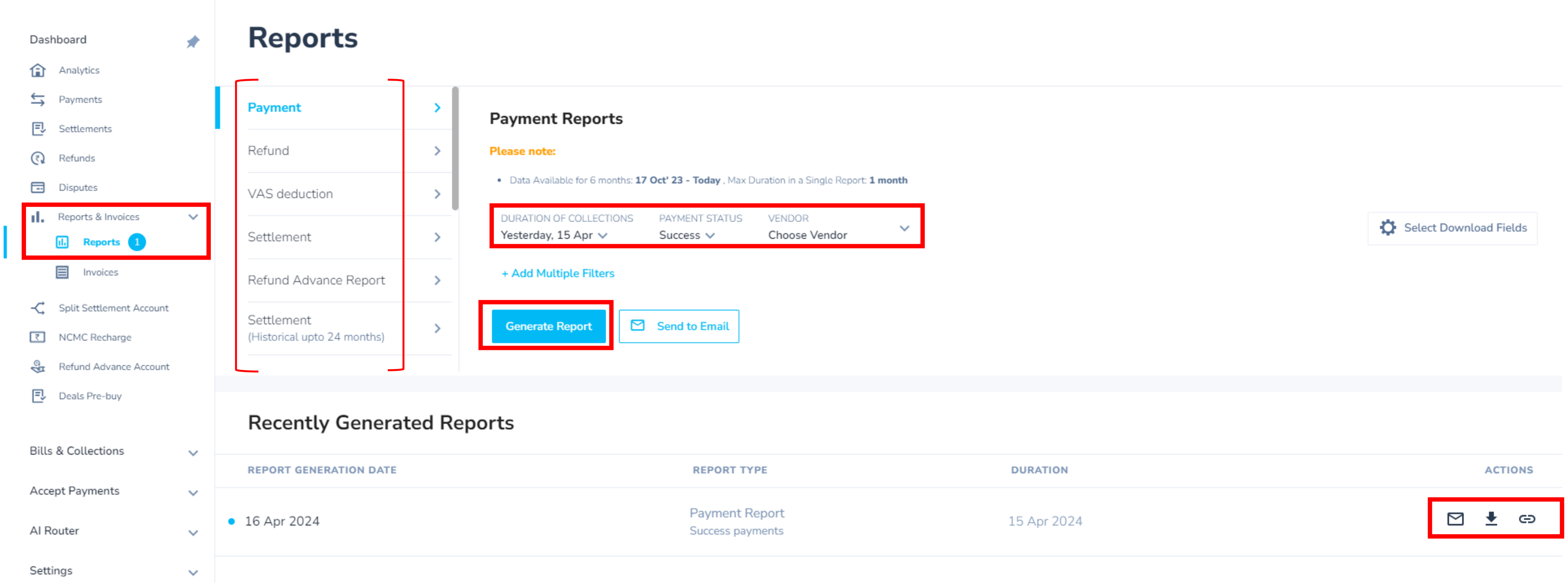


Features of Reports and how to download

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

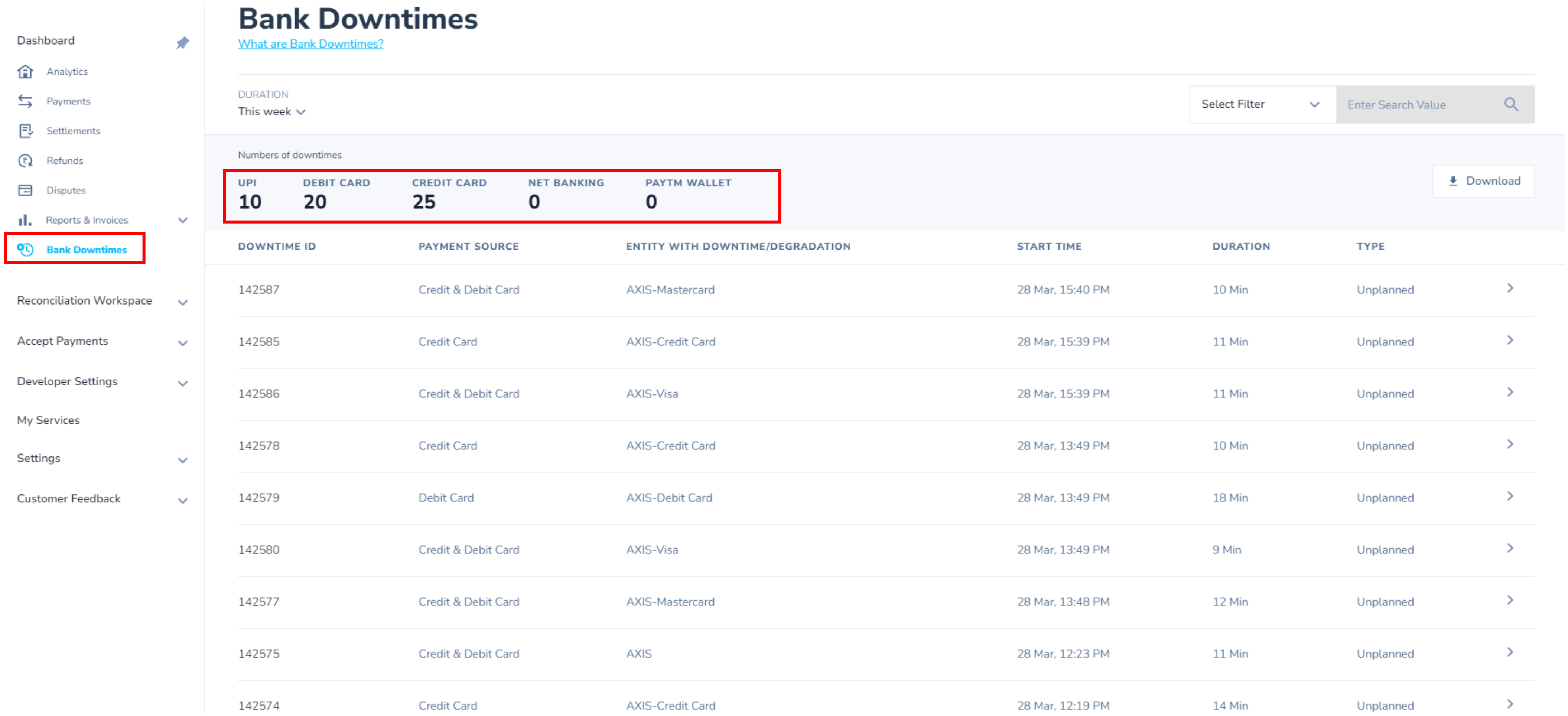
Step 1: Click on reports
Step 2: Click on particular section of report you wish to download
Step 3: Click on manage report to customize the report as per your requirement
Step 4: Select the desired duration and click on Generate report
Step 5: Click on 'Download' icon to download the report

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



Features of Bank Downtime

- This feature gives you a summary view of the total downtimes on each payment source
- You can also see the list view of the 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

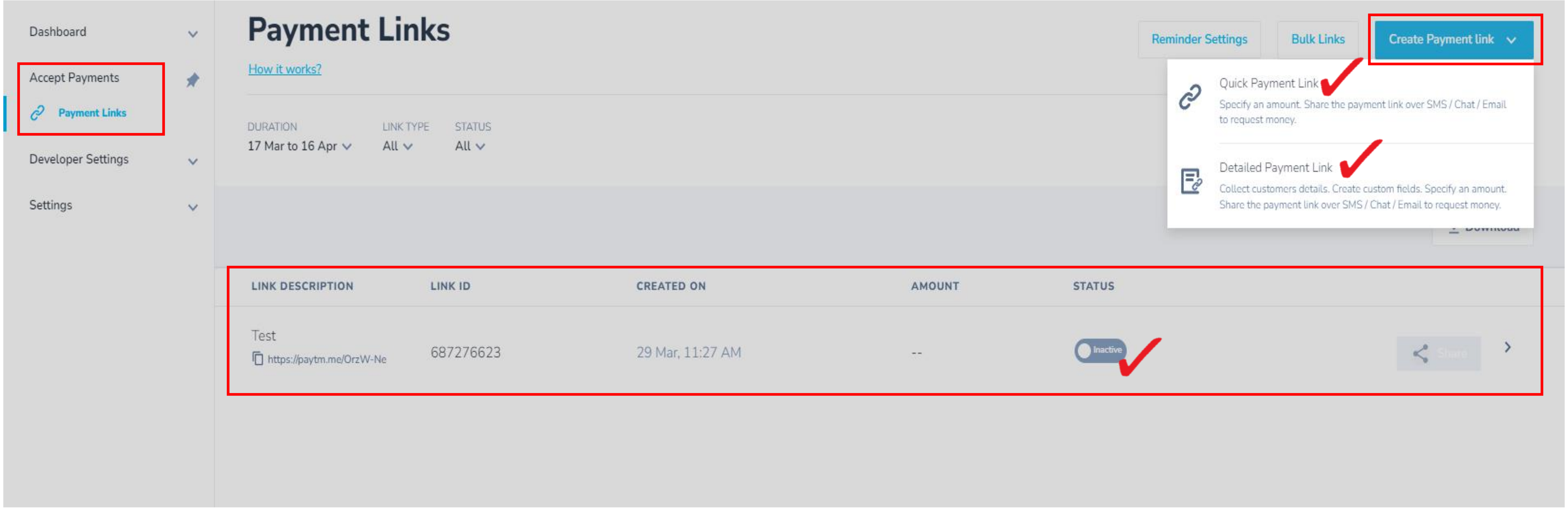


DOWNTIME ID	PAYMENT SOURCE	ENTITY WITH DOWNTIME/DEGRADATION	START TIME	DURATION	TYPE
142587	Credit & Debit Card	AXIS-Mastercard	28 Mar, 15:40 PM	10 Min	Unplanned
142585	Credit Card	AXIS-Credit Card	28 Mar, 15:39 PM	11 Min	Unplanned
142586	Credit & Debit Card	AXIS-Visa	28 Mar, 15:39 PM	11 Min	Unplanned
142578	Credit Card	AXIS-Credit Card	28 Mar, 13:49 PM	10 Min	Unplanned
142579	Debit Card	AXIS-Debit Card	28 Mar, 13:49 PM	18 Min	Unplanned
142580	Credit & Debit Card	AXIS-Visa	28 Mar, 13:49 PM	9 Min	Unplanned
142577	Credit & Debit Card	AXIS-Mastercard	28 Mar, 13:48 PM	12 Min	Unplanned
142575	Credit & Debit Card	AXIS	28 Mar, 12:23 PM	11 Min	Unplanned
142574	Credit Card	AXIS-Credit Card	28 Mar, 12:19 PM	14 Min	Unplanned

Steps to create Payment Link

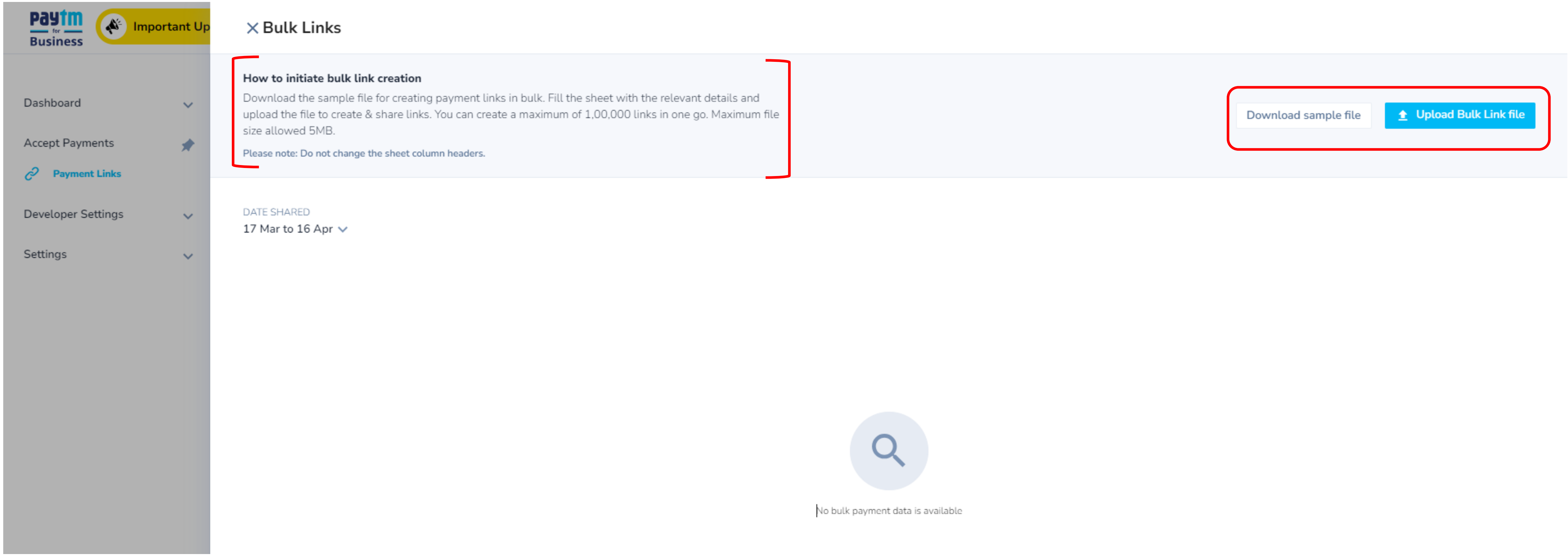
Step 1: Click on ‘Accept Payments’
Step 2: Click on ‘Payment Links’ to create a payment link
Step 3: Click on Quick Payment Link or Detailed Payment Link
All the created links will be visible at the bottom
You can change the link status (Active/Inactive)

Note: Quick Payment Link is available by default for all merchants and Detailed Payment Link is only available for 500k and above



Steps to create Bulk Payment Link

Step 1: Click on ‘Bulk Links’ to see the process
Step 2: Download the sample file for the bulk link and fill the sheet with information
Step 3: Upload the file by clicking on ‘Upload Bulk Link File’



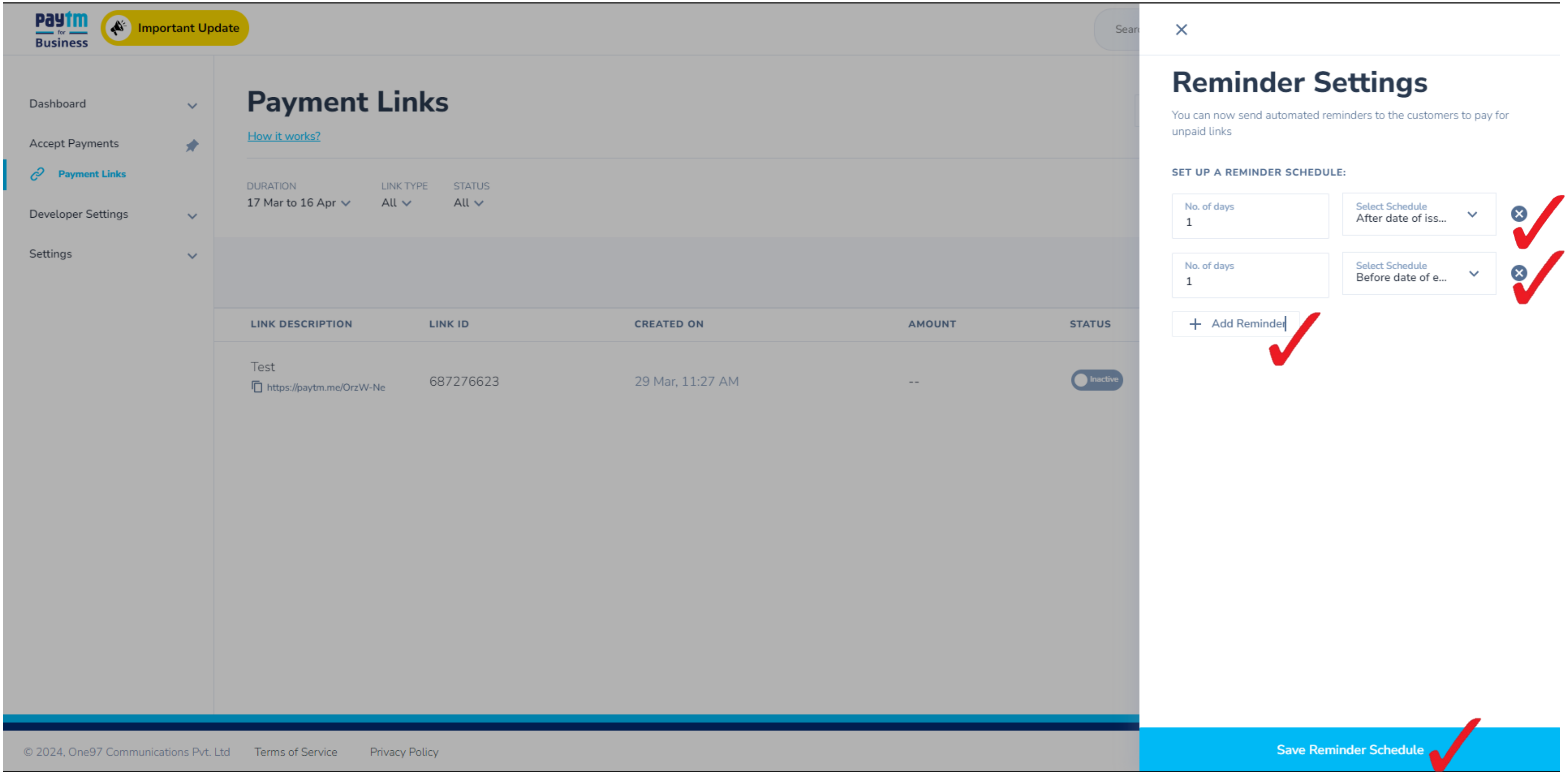
Difference between Quick Payment Link & Detailed Payment Link

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

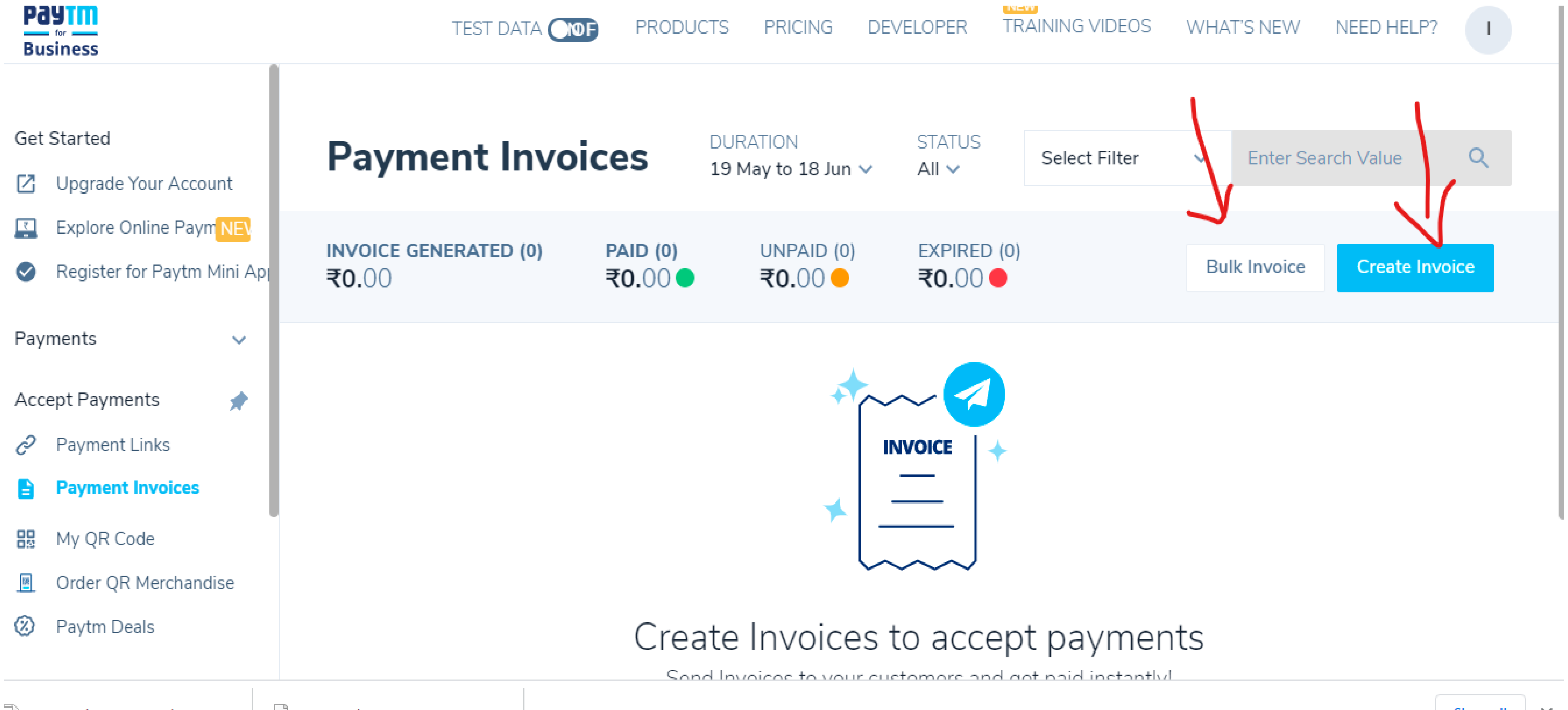
Reminder Settings

- With this feature you can send automated reminders to the customers to pay for unpaid links



Features of Payment Invoices

- 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



How 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)

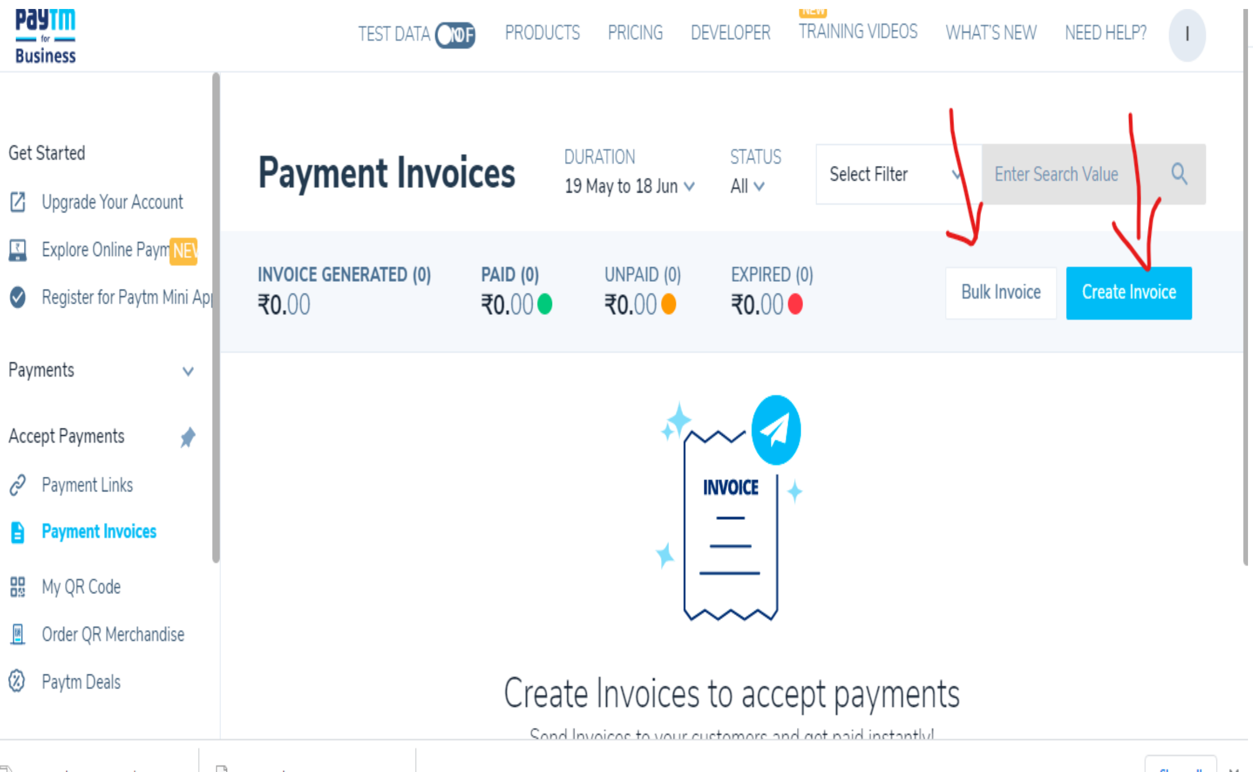
Step 3: Post entering the details you can able to share the link to mobile number/email ID

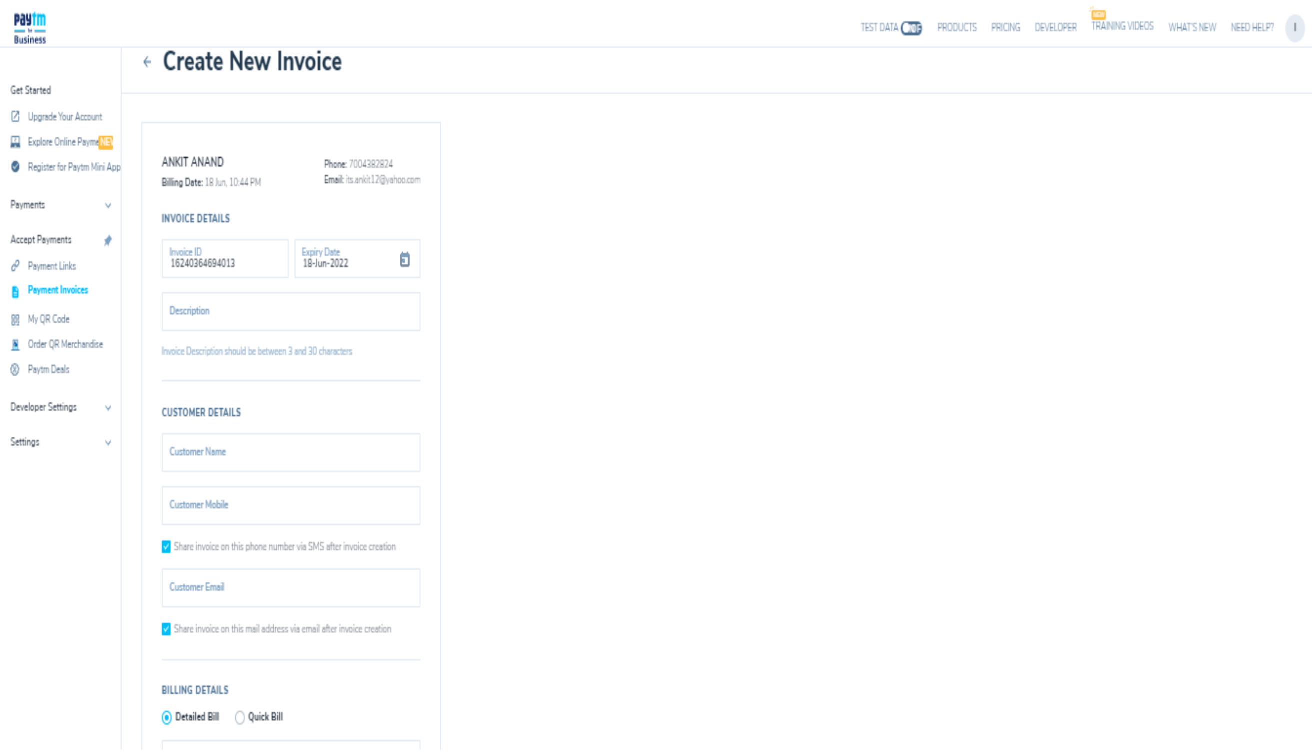
How to Create Bulk Invoice

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’



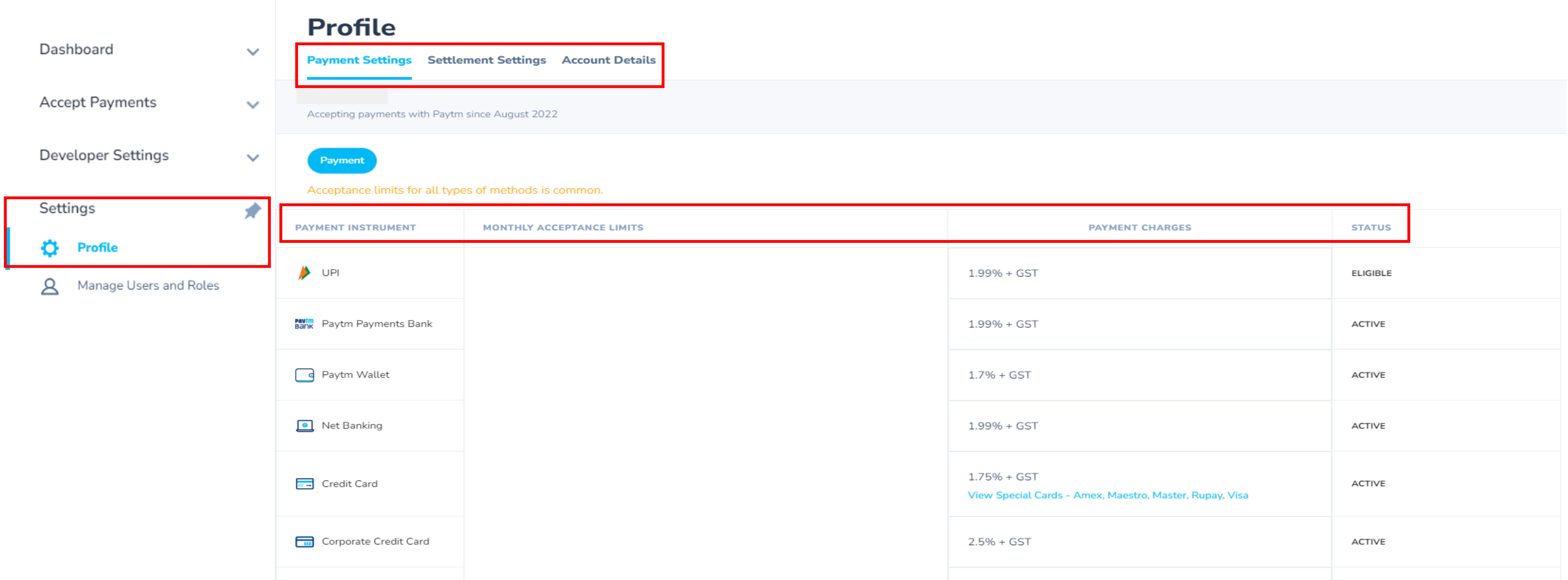


Features of Profile under Settings Tab

Step 1: Click on 'Profile' under settings tab
Step 2: Under Profile 3 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

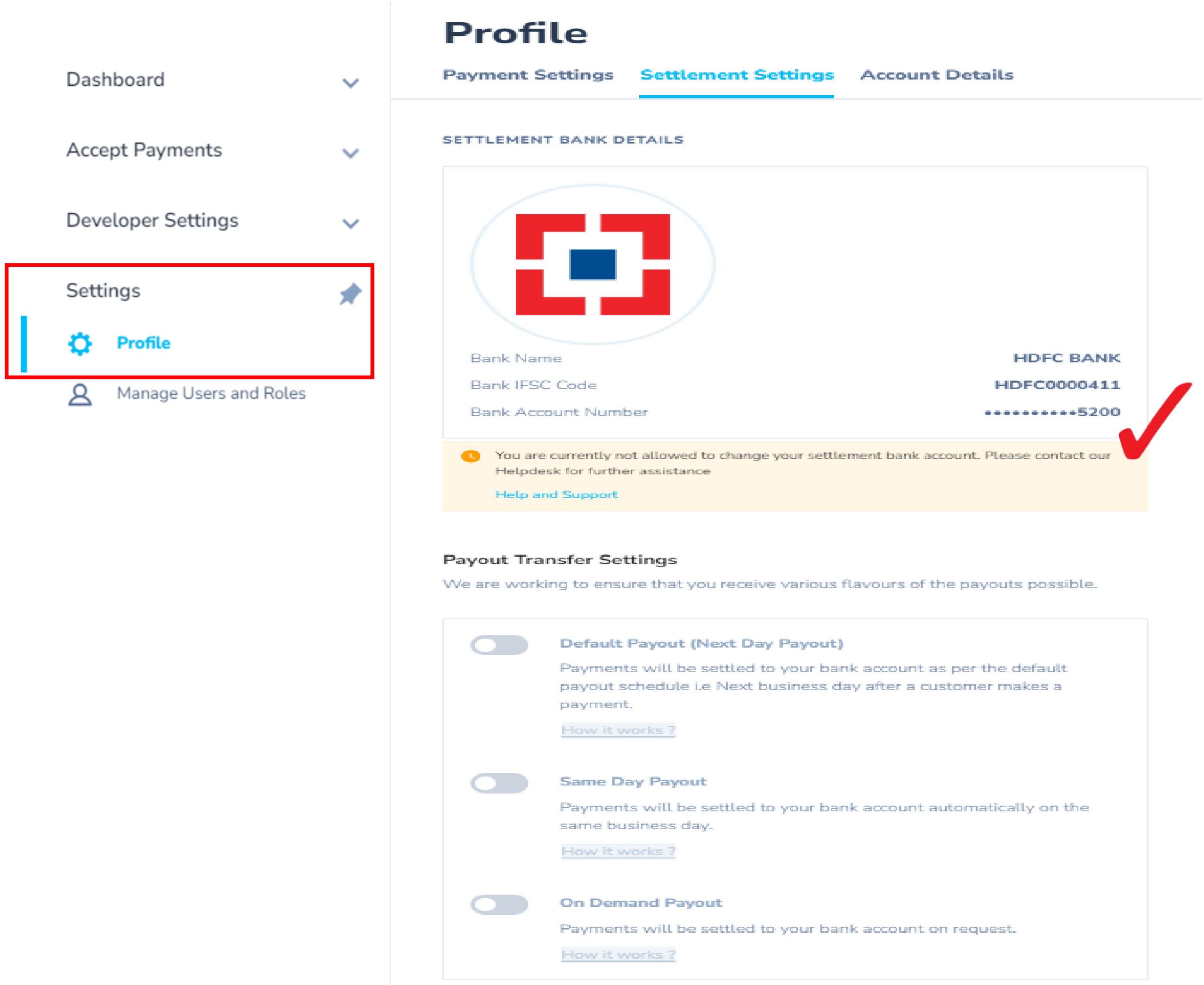


Payout Settings

Step 1: Click on Payout settings

Step 2: Here you can see your Bank account details and settlement cycle

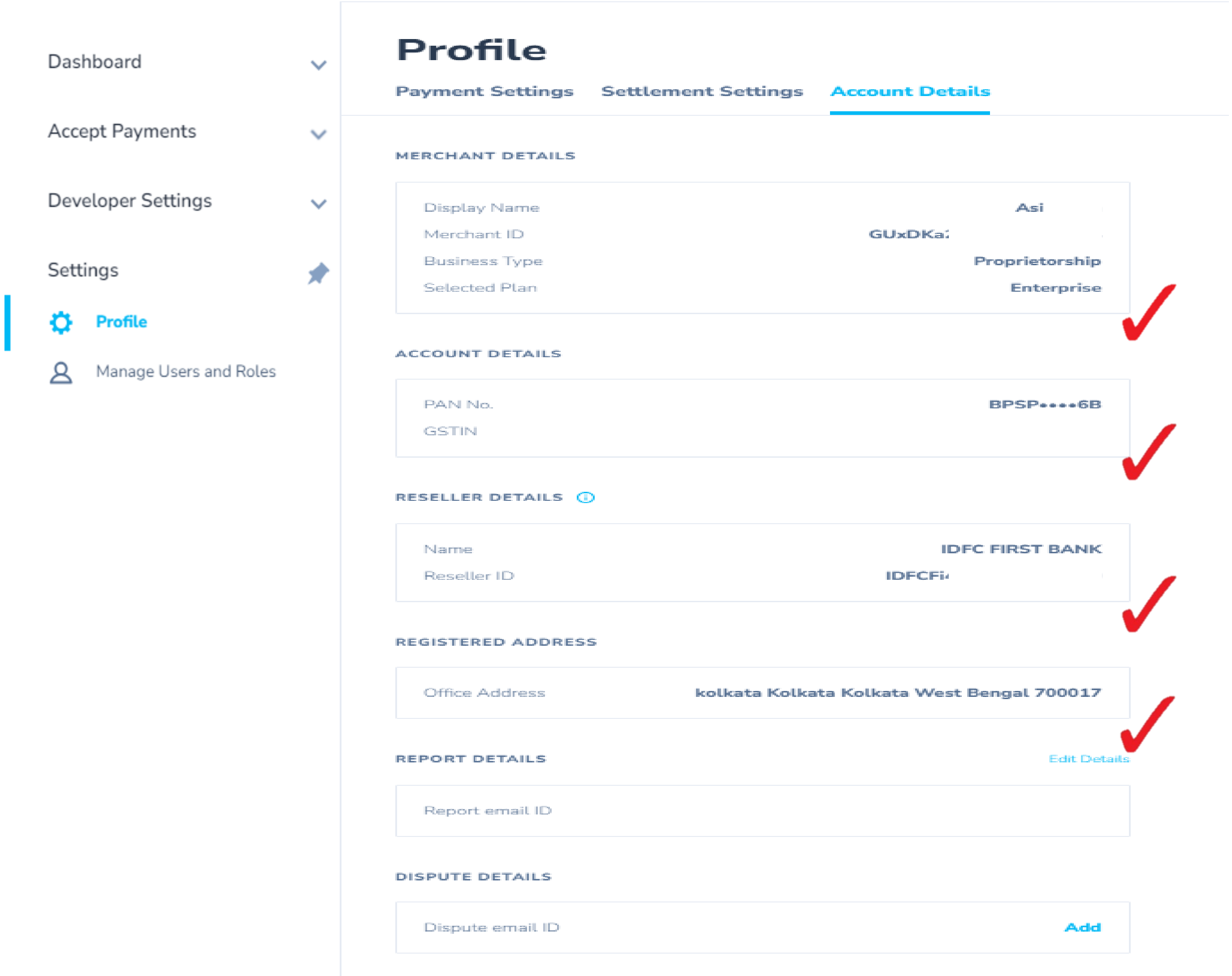
Note: Settlement cycle view will vary if you have access to Instant Settlement feature



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:

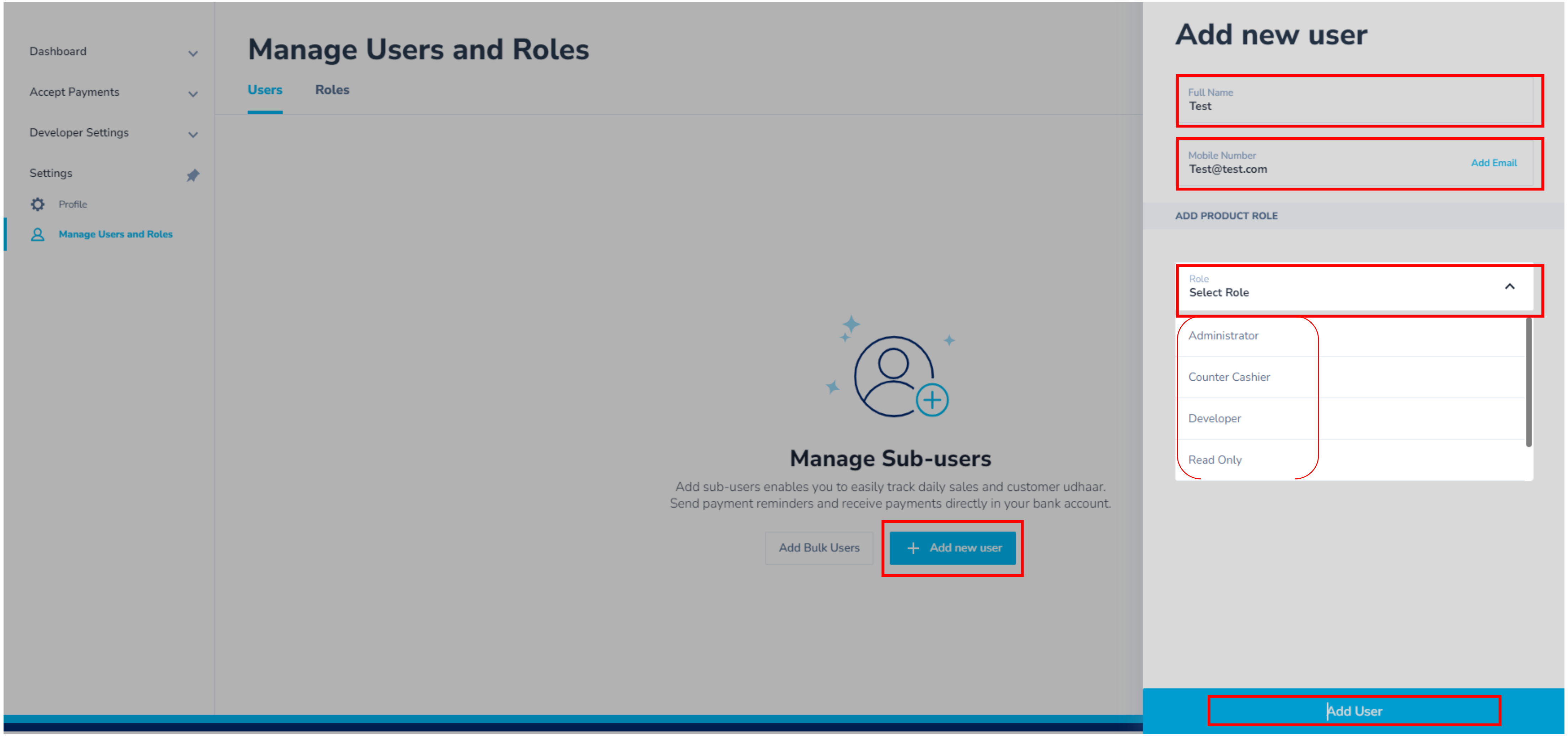
You can create sub users with complete or restricted access on your Merchant Dashboard.
Use mobile number or email ID to add sub-users from the 'Manage Users' tab. If the sub-user is not already on Paytm, he/she will get an email and SMS to create an account and then join the team on the dashboard.

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
- If you have been using our Merchant Dashboard 1.0 then added Sub Users will be carried forward with existing rights, it suggested that you edit their roles
- A sub-user of a non-SD merchant without his own MID will not be able to activate/upgrade his merchant account

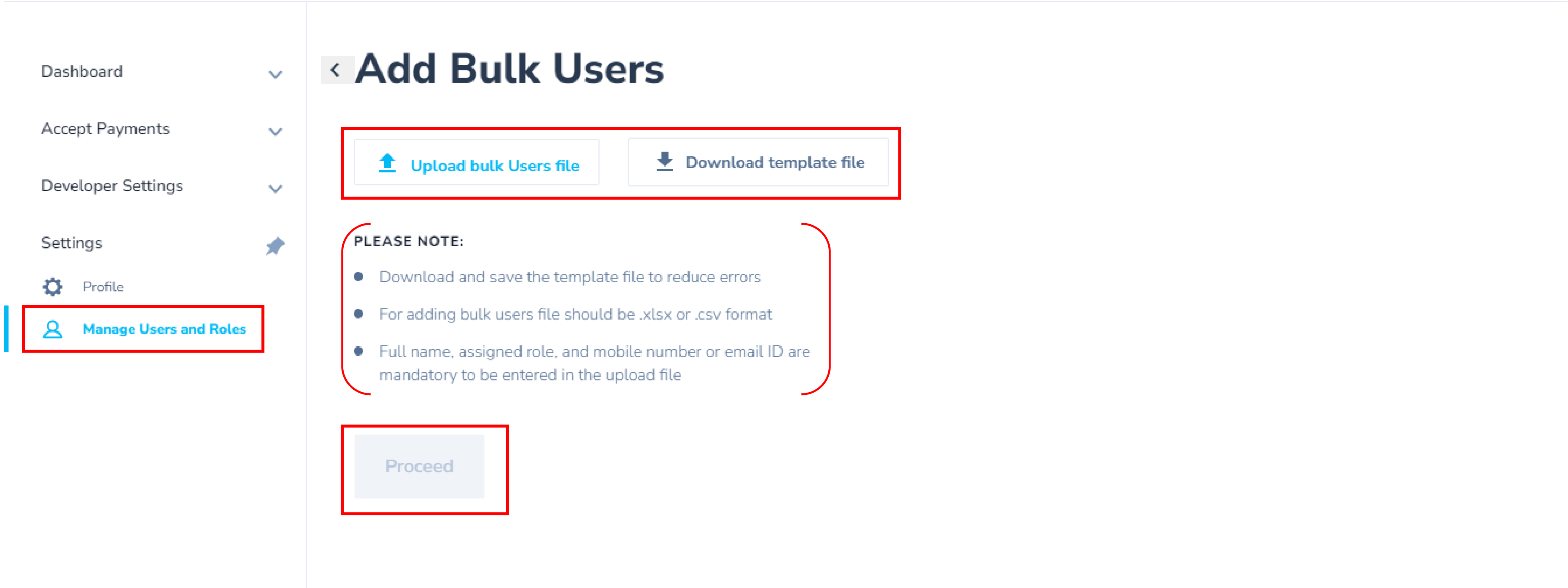
How to Add Sub User

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



How to Add Bulk Sub User

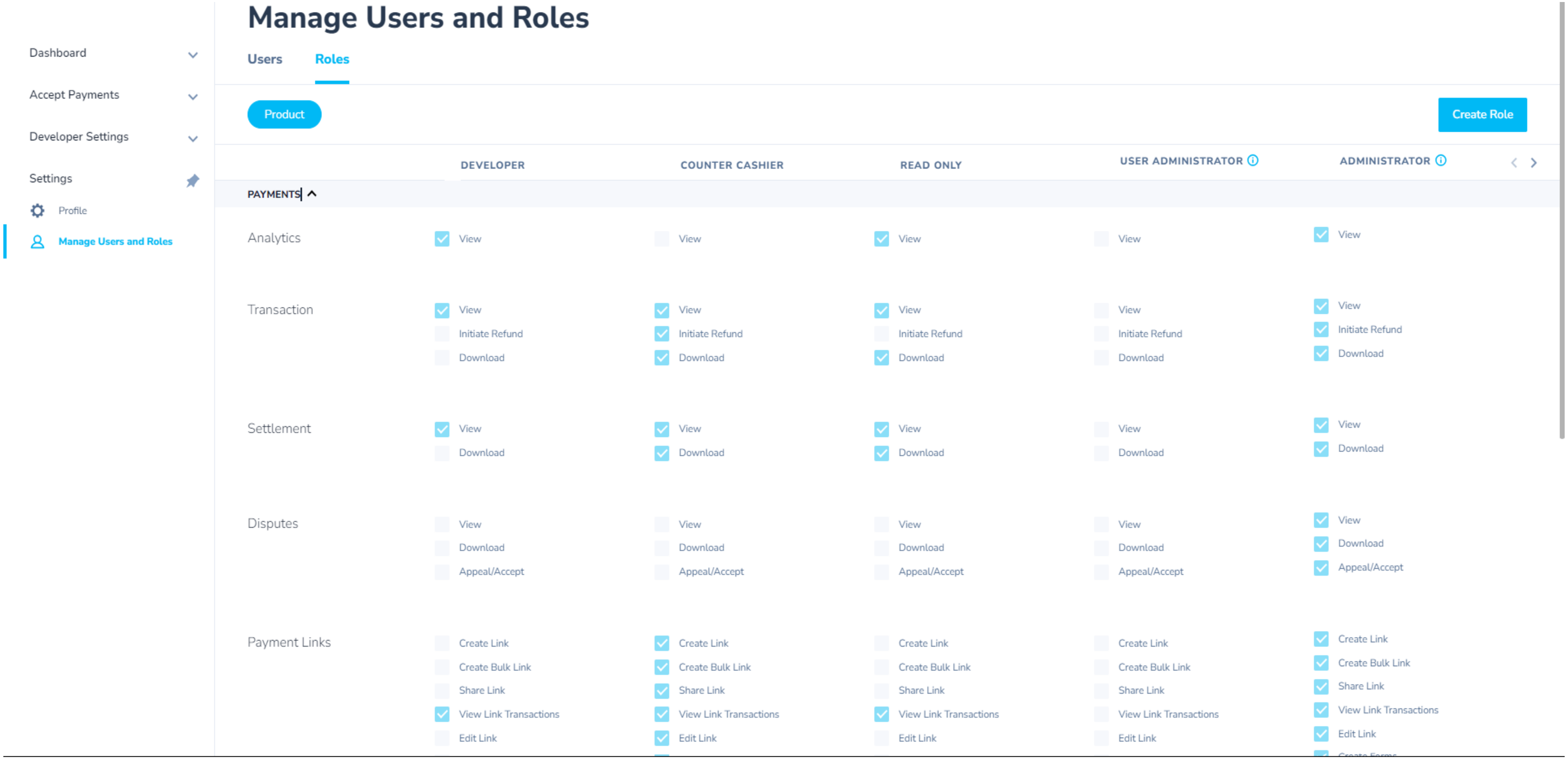
Step 1: Click on 'Bulk sub user' to create a sub-user in bulk
Step 2: Download the sample file and fill in the required details
Step 3: As per instruction upload the file to complete the process



How to Create Roles

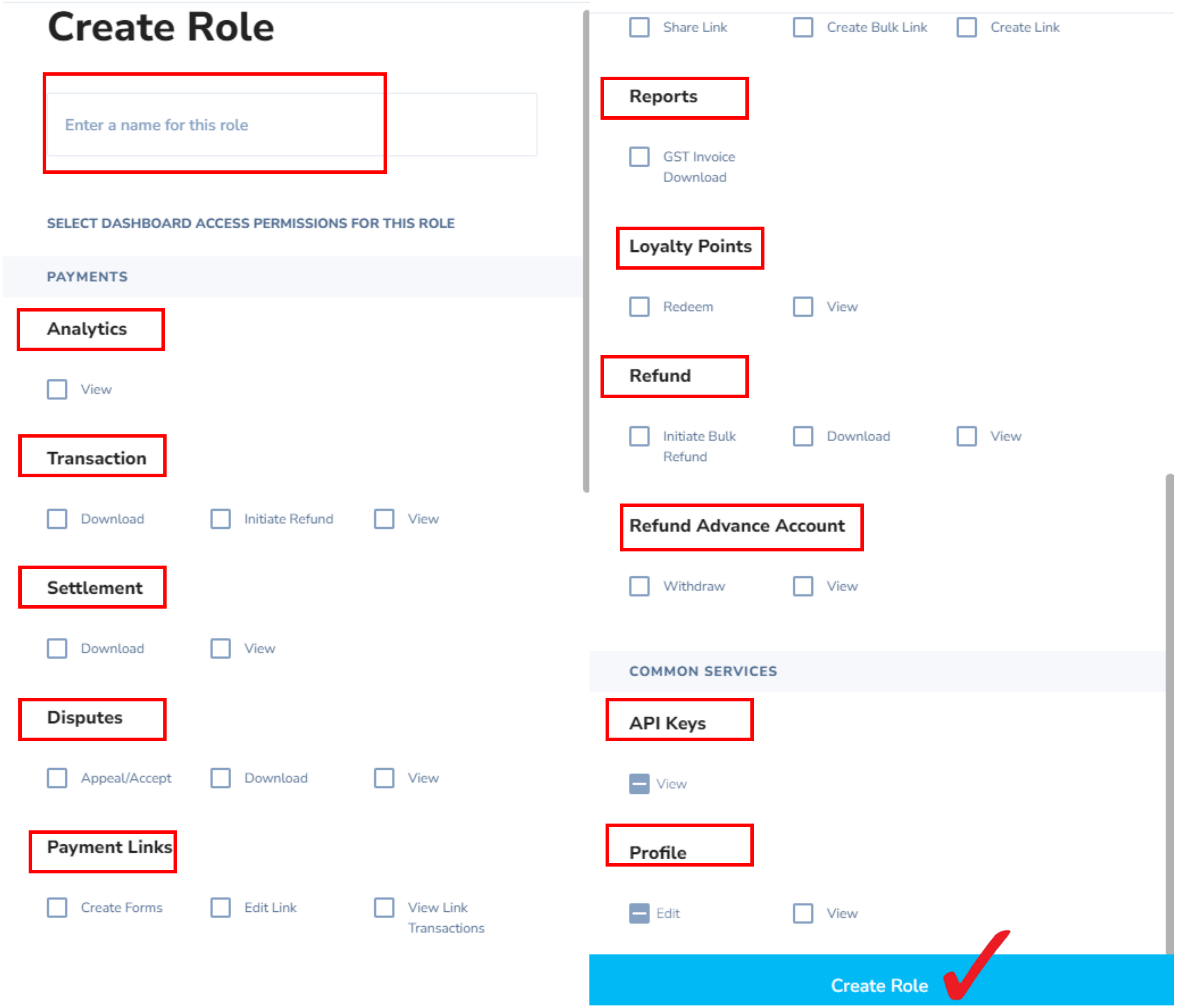
Step 1: Click on ‘Roles’ under Manage Users and Roles

Step 2: 4 roles will be visible by default (Developer, Counter Cashier, Read Only, User Administrator & Administrator)



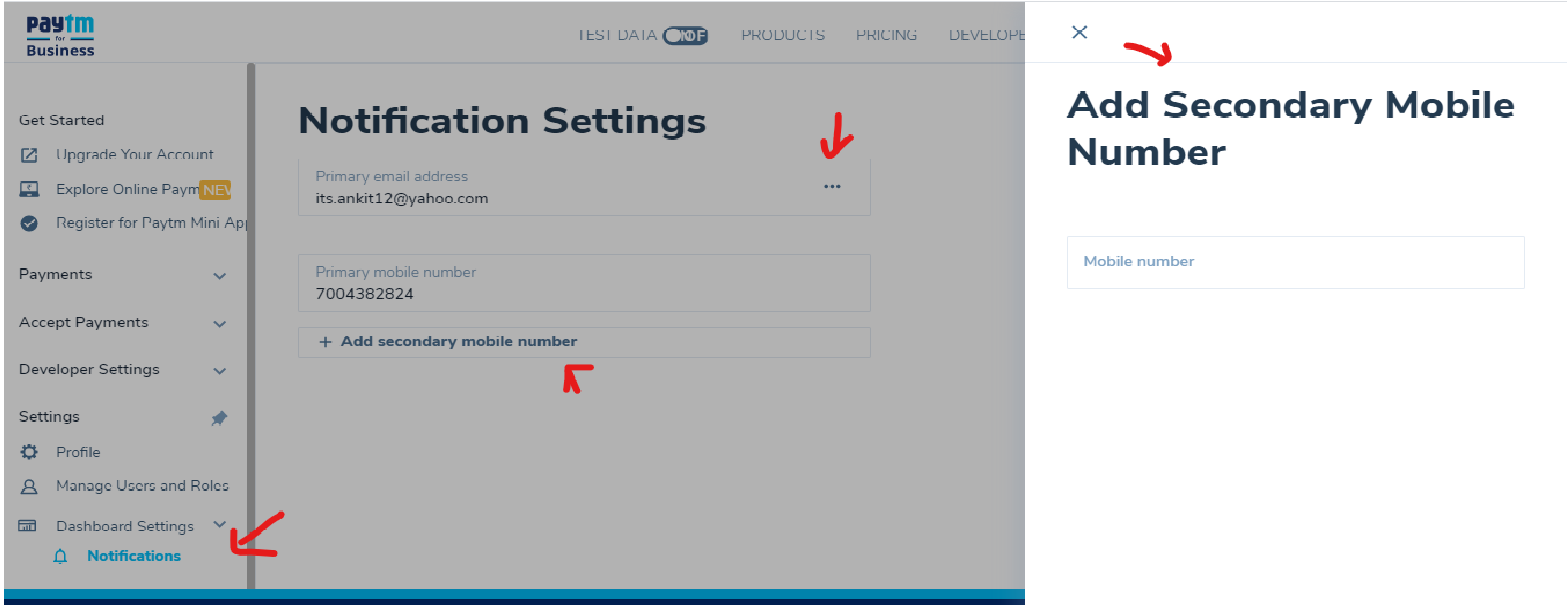
How to Create Roles

Step 3: Click on 'Create Role' on top right
Step 4: Enter the role name
Step 5: Select the desired permission for the role by clicking on the check boxes



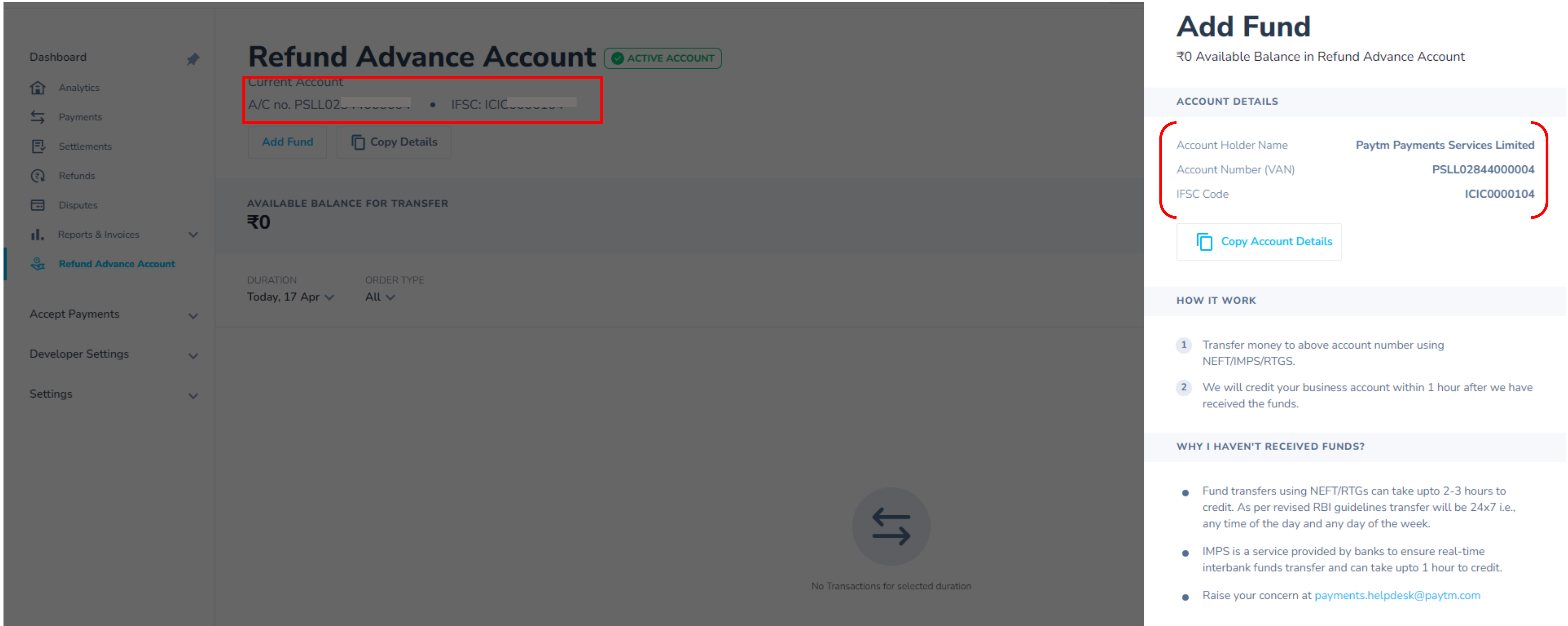
Notification settings under Dashboard Settings tab

- 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 will be visible as per your Merchant type



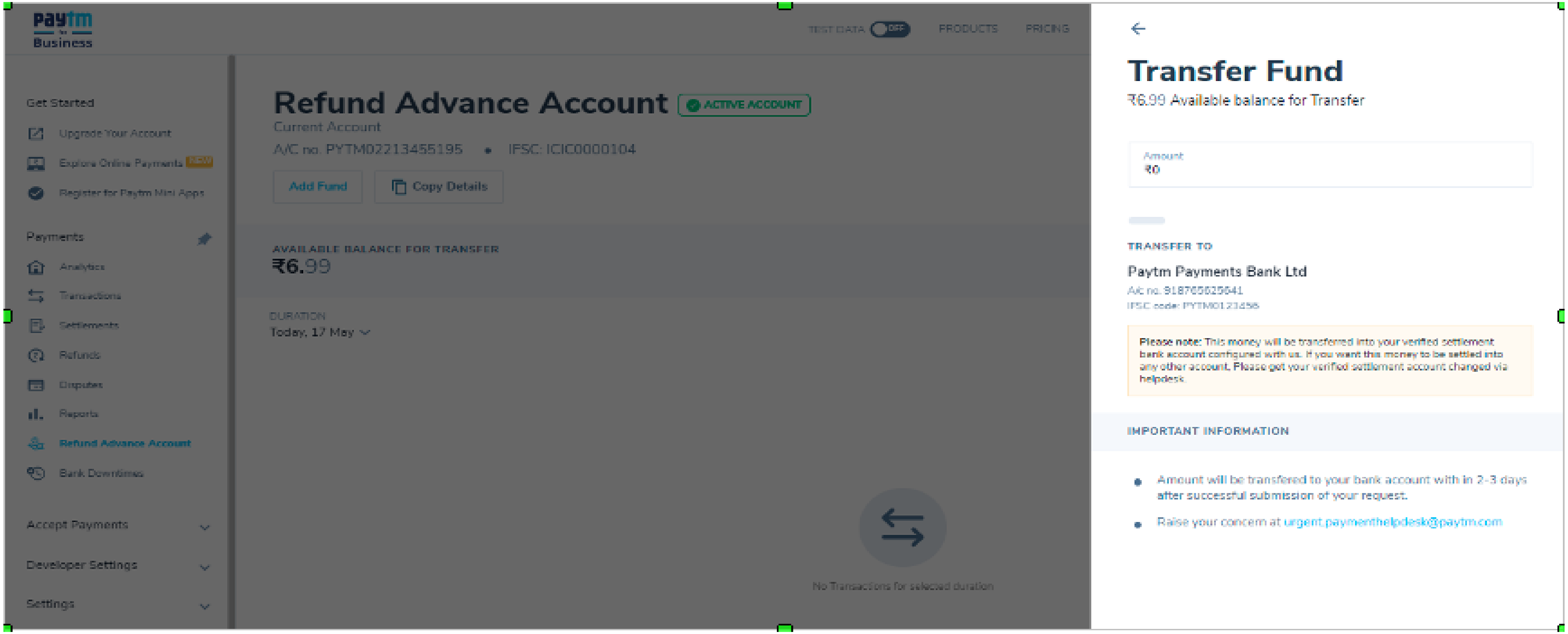
Refund Advance Account

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



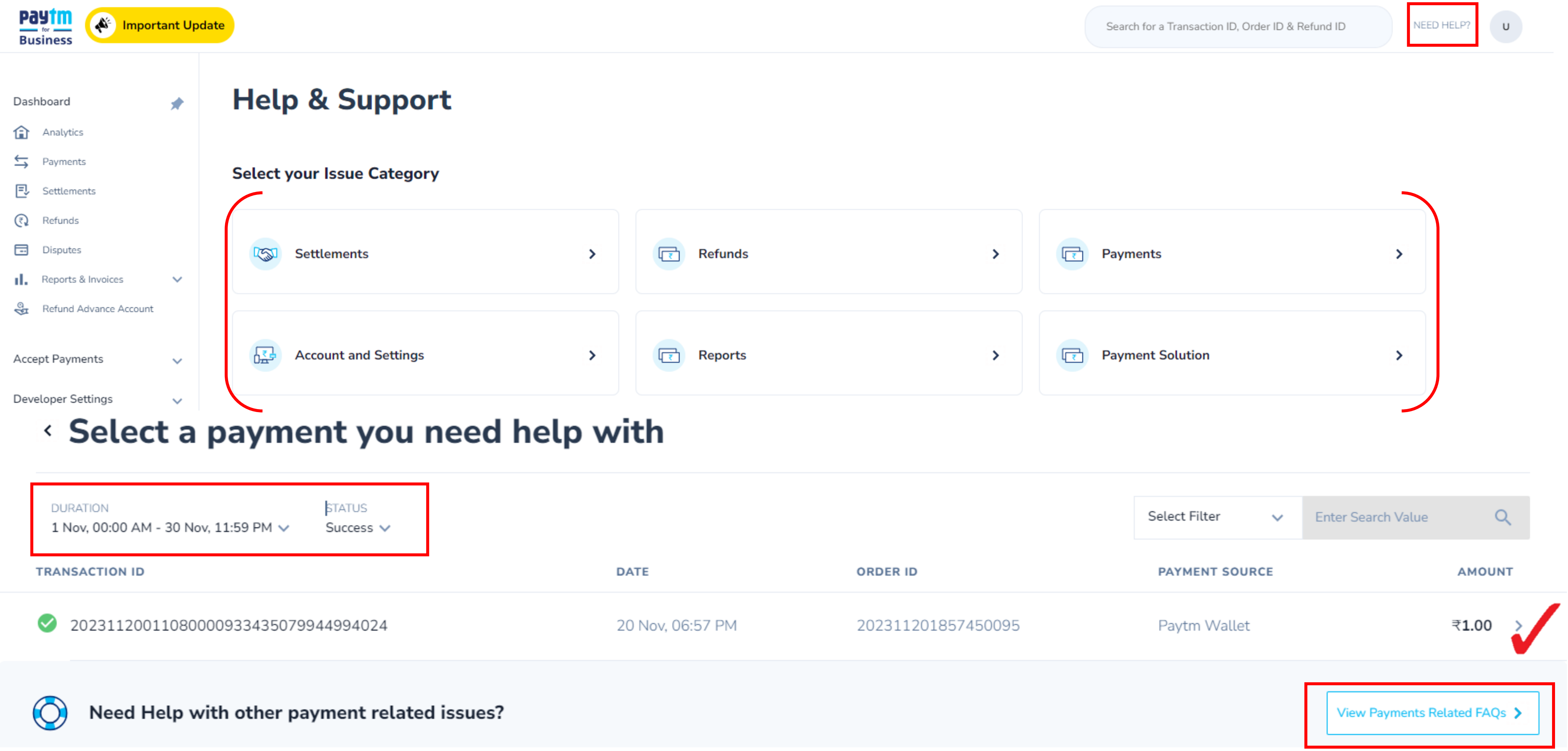
How to withdraw money from Refund Advance Account

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’



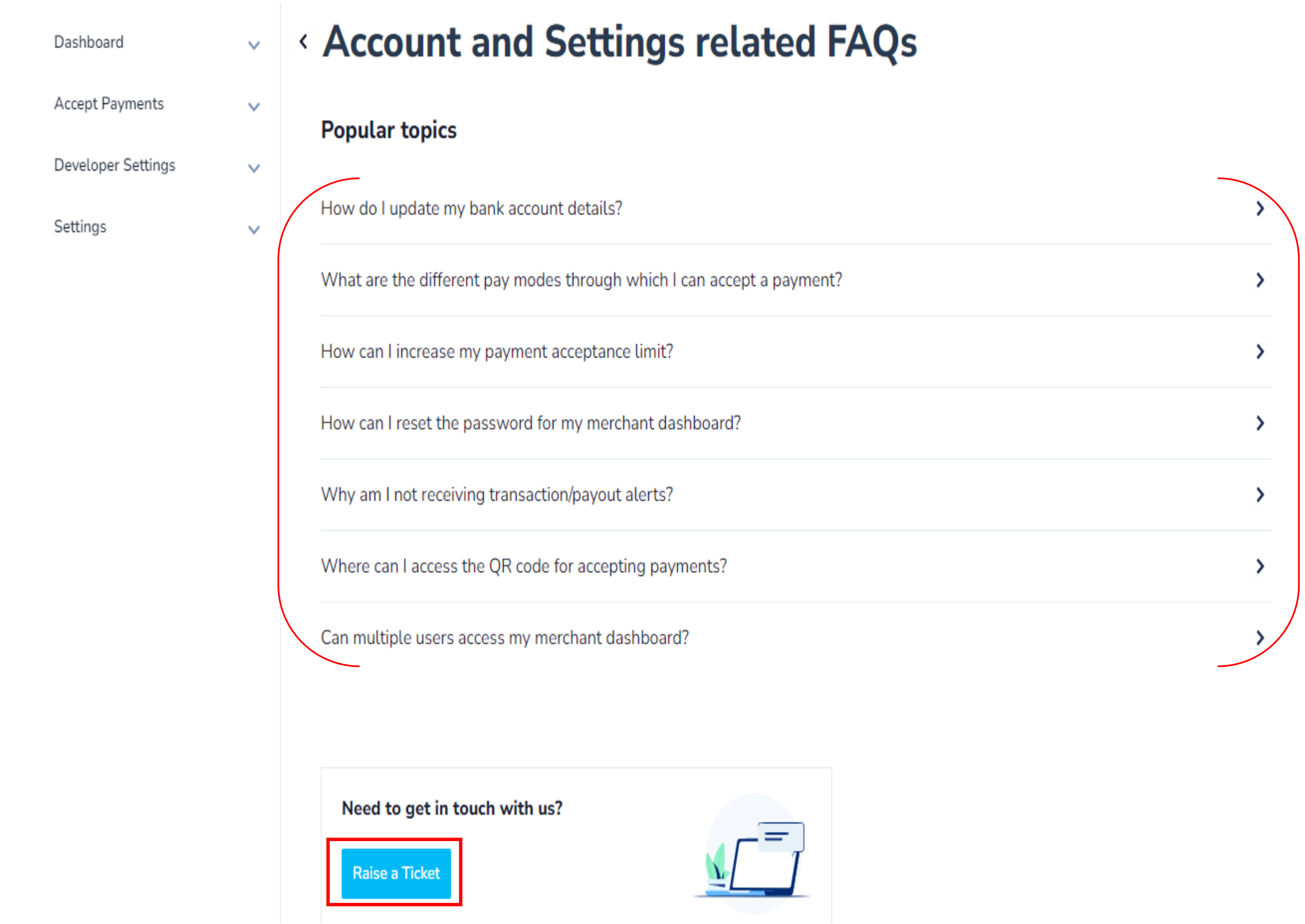
How to raise queries from Dashboard

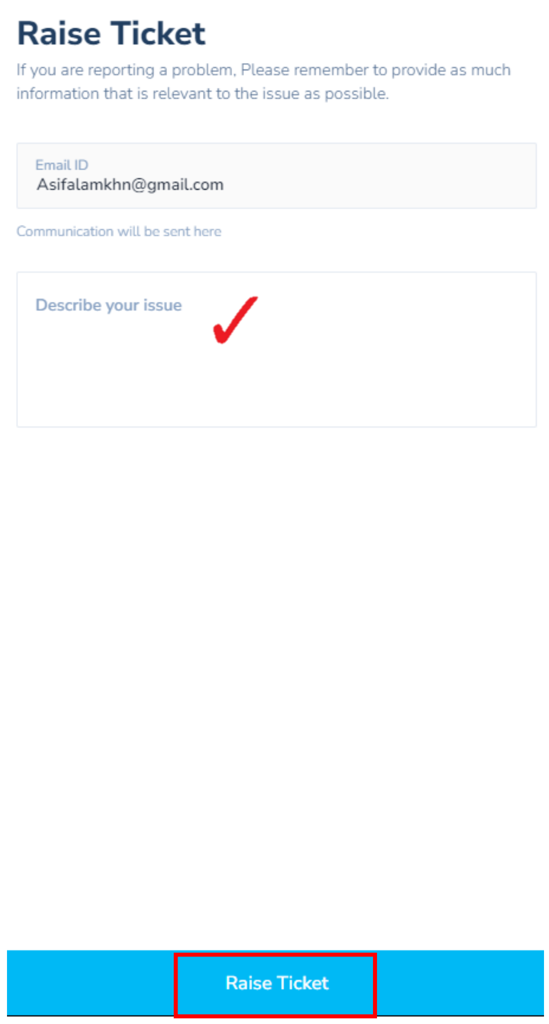
Step 1: Click on 'Need help?' at the top right corner, the help & support section will be open
Step 2: Select the issue category you need help with
Step 3: After selecting the issue category, you can select a particular Payment/settlement/Refund and for other issues please select the FAQs



How to raise queries through FAQs

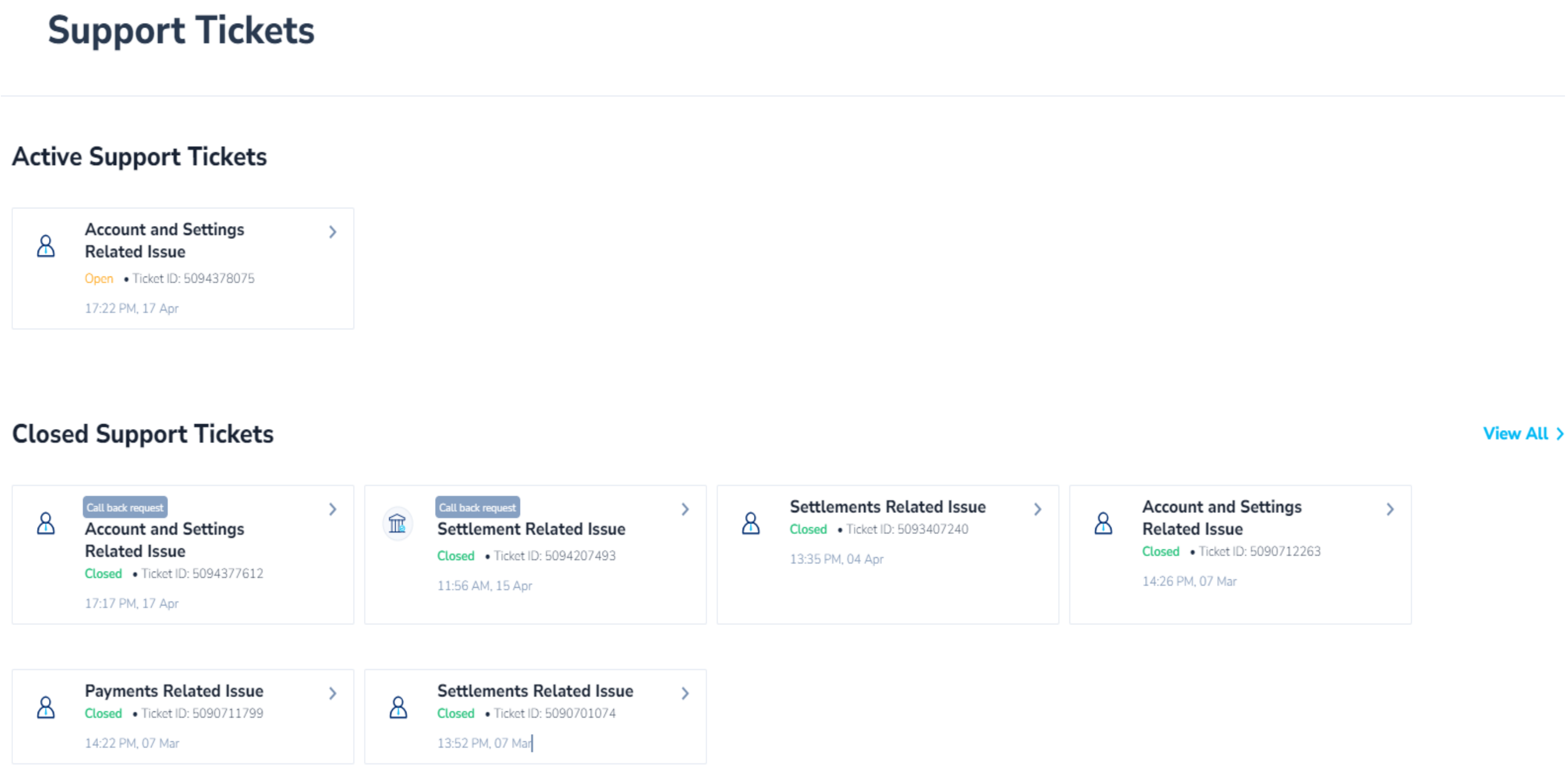
Step 1: Select the concern related issue category from the list and the FAQs will be visible
Step 2: Select the FAQ to get the resolution or else click on ‘Raise a Ticket’ or ‘Raise a Call back Request’ to connect with the support team





How to track tickets from Dashboard

Step 1: All created tickets will be visible under 'Support Tickets'
Step 2: Select the ticket from 'Active Support Tickets' to track and check the responses received from the support team
Step 3: You can also send the requested documents/information and respond on the tickets from the dashboard only



THANK YOU!