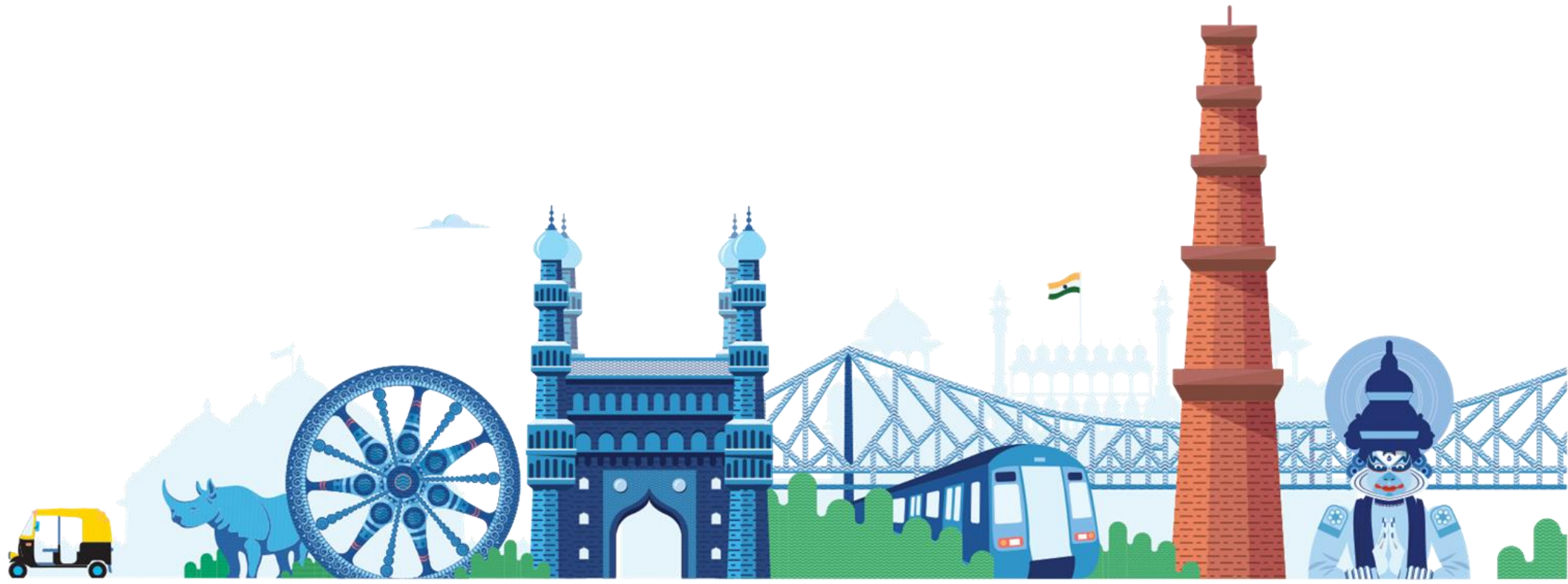


# Unified Merchant Panel/Dashboard Guide



# Content

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2. Analytics Tab
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  - b. Payout Setting
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# 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](mailto:care@paytmpayments.com).



## Login with your Paytm account

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

Enter your Mobile Number or Email

Paytm Password

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](#)

## Enter OTP

Sent to your mobile number ending in \*\*\*\*\*9911

Enter OTP

[Resend OTP](#)

Verify

# 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

## Login with your Paytm account

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

Enter your Mobile Number or Email

Paytm Password



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](#)

## ← Forgot Password

If you have forgotten your password, [please call 0120-4888488](#) from the phone number you are registered with on Paytm. After language selection, **press 1** to reset your password

If you would like to reset your password using your registered email address, please [click here](#)

# 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.

The screenshot displays the Paytm Payments dashboard. On the left is a sidebar menu with options: Dashboard, Payments (highlighted with a red box), Settlements, Refunds, Reports & Invoices, Split Settlement Account, NCMC Recharge, Refund Advance Account, Deals Pre-buy, Bank Downtimes, Payouts, Bills & Collections, Reconciliation Workspace, and Accept Payments. The main content area features a blue banner at the top that reads "Never miss a payment. Get voice alerts with SoundBox" and includes a "₹300 Received" badge, a QR code, and an "Order Now" button. Below the banner, the "Payments" section is titled. It contains a filter bar with four dropdown menus: "MERCHANT ID" (set to "Internal Admin vi..."), "DURATION" (set to "Today, 26 Mar"), "TRANSACTION TYPE" (set to "Acquiring"), and "STATUS" (set to "Success"). To the right of these filters is a search bar labeled "Select Filter" with a dropdown arrow and a search icon, and a text input field labeled "Enter Search Value". Below the filter bar, two summary cards are shown: "TOTAL PAYMENTS ₹0.00" and "TOTAL TRANSACTIONS 0". A "Download" button is visible on the right side. At the bottom center, there is a circular icon with two arrows pointing in opposite directions. The footer text at the bottom center reads "No payments available for 26 March".

# Features of Payments

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

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for  
Business

Important Update  
ous version of the dashboard [Click here.](#)

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My Services

Never miss a payment.  
Get voice alerts with SoundBox

₹300  
Recharge



## Payments

DURATION  
Today, 28 Mar

TRANSACTION TYPE  
Acquiring

STATUS  
Success

TOTAL PAYMENTS  
₹1,66,31,022.51

TOTAL TRANSACTIONS  
2691

TRANSACTION ID	DATE	ORDER ID	PAYMENT SOURCE
✓ 20240328010840000980068380013	28 Mar, 11:21 AM	17583	Credit Card
✓ 20240328010980000980068346081	28 Mar, 11:21 AM	17583	UPI
✓ 202403280110900009800683083783	28 Mar, 11:21 AM	17583	Credit Card
✓ 202403280110200009800682947427	28 Mar, 11:21 AM	17583	Credit Card
✓ 20240328011010000980068278863	28 Mar, 11:21 AM	17583	UPI
✓ 20240328011000000980068238028	28 Mar, 11:21 AM	17583	UPI

×

₹27,183.68

28 Mar 2024, 11:22 am

FROM

Credit Card \*\*\*\*3574

State Bank of India

AMOUNT DETAILS

Payment Amount

₹ 27,183.68

Charges

- ₹ 489.31

GST

- ₹ 88.08

Amount to be settled

₹ 26,606.29

CUSTOMER DETAILS

Customer ID

17583

PAYMENT DETAILS

Payment Option

State Bank of India Credit Card \*\*\*\*3574

Order ID

\*\*\*\*\*354337

Transaction ID

\*\*\*\*\*287511

RRN

7116051311296440105962

OTHER DETAILS

Response Code

01



# 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

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## Payments

DURATION1 Nov, 00:00 AM - 30 Nov, 11:59 PM▼STATUSSuccess▼

TOTAL PAYMENTS₹1.00TOTAL TRANSACTIONS1

TRANSACTION ID	DATE	ORDER ID
✓ 20231120011080000933435079944994024	20 Nov, 06:57 PM	202311201857450095

×

Need Help?

Payment Received

₹1.00

20 Nov 2023, 06:58 pm

FROM

9740214323

Paid Using Paytm Wallet

Refund to Customer

AMOUNT DETAILS

Payment Amount₹ 1.00

Charges- ₹ 0.02

Settled Amount₹ 0.98

CUSTOMER DETAILS

Mobile Number9740214323

Customer IDN.A

PAYMENT DETAILS

Payment OptionPaytm Wallet 9740214323

Order ID\*\*\*\*\*450095

Transaction ID\*\*\*\*\*994024

Original Price₹1

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# 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

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Important Update

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DURATION  
1 Nov, 00:00 AM - 30 Nov, 11:59 PM

STATUS  
Success

TOTAL PAYMENTS  
₹1.00

TOTAL TRANSACTIONS  
1

TRANSACTION ID	DATE	ORDER ID
20231120011080000933435079944994024	20 Nov, 06:57 PM	202311201857450095

Refund to Customer

₹0 Available for Refund

Payment Amount ₹1

Already Refunded ₹0

Total Refund Allowed ₹1

Enter Amount to Refund

Enter Remarks (Optional)

☐ I understand I am sending money back to customer. I will not get settlement of this amount in my account.

Refund to Customer

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# 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’

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DURATION

1 Nov, 00:00 AM - 30 Nov, 11:59 PM

STATUS

Success

TOTAL PAYMENTS

₹1.00

TOTAL TRANSACTIONS

1

TRANSACTION ID	DATE	ORDER ID
20231120011080000933435079944994024	20 Nov, 06:57 PM	202311201857450095

Need Help?

Payment Received

₹1.00

20 Nov 2023, 06:58 pm

FROM

9740214323

Paid Using Paytm Wallet

Refund to Customer

AMOUNT DETAILS

Payment Amount

₹ 1.00

Charges

- ₹ 0.02

Settled Amount

₹ 0.98

CUSTOMER DETAILS

Mobile Number

9740214323

Customer ID

N.A

PAYMENT DETAILS

Payment Option

Paytm Wallet 9740214323

Order ID

\*\*\*\*\*450095

Transaction ID

\*\*\*\*\*994024

Original Price

₹1

Need Help

Payment Received

₹1.00

Order ID: 202311201857450095 • 20 Nov 2023, 06:57 pm

Describe your issue

Briefly let us know what you need help with

Raise ticket

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# 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'

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for Business

Important Update ous version of the dashboard [Click here.](#)

Search for a Transaction ID, Order ID & Refund ID

PRODUCTS

A

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Never miss a payment.  
Get voice alerts with SoundBox

₹300  
Received



Order Now

## Settlements

DURATION  
Yesterday, 26 Mar

Select Filter Enter Search Value

AMOUNT SETTLED  
₹5,18,75,330.38

BALANCE AVAILABLE FOR TRANSFER  
₹1,42,71,856.36  
[View Balance Statement](#)

PENDING AMOUNT  
₹0.00

Download

Transfer Balance to Bank

DATE	TIME	PAYMENT AMOUNT	ADD MONEY BY CASH	DEDUCTION	NET AMOUNT
26 Mar 2024					
<div><div>✓</div>UTR: UTIBR720240326</div>	04:26 PM		0.00		<div><div>Download</div><div>&gt;</div></div>

# 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'

×

Need Help?

PAYMENT AMOUNT

₹1.00 ⓘ

−

DEDUCTIONS

₹0.02 ⓘ

+

PREVIOUS DAY'S BALANCE

₹1.96

=

SETTLED AMOUNT

₹0.00

+

REMAINING BALANCE

₹2.94

TRANSACTION ID	TRANSACTION TYPE	DATE	ORDER ID	AMOUNT
20231120011080000933435079944994024	Payment	20 Nov, 06:57 PM	202311201857450095	₹1.00

← Need Help

Settlement Successful

₹0.98

UTR: • 21 Nov 2023, 12:00 am

Describe your issue

Briefly let us know what you need help with

✓

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

Paytm Business

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AI Router

X

UTR: UTIBR7202403XXXXXX

Transferred to: HSBC XXXXXXXX

A/c no.: 0543\*\*\*XXXXXX IFSC code: HSBC0XXXXXX

PAYMENT AMOUNT

₹6,56,36,658.42

DEDUCTIONS

₹1,06,55,431.50

ADD MONEY BY CASH

₹0

SETTLED AMOUNT

₹5,49,81,226.92

TRANSACTION ID	TRANSACTION TYPE	ORDER ID	AMOUNT
202403260109200009791XXXXXX	Refunds		₹97,66,972.86
	Chargeback	1756491XXXXXX	₹12,634.24
	Commission	1756491XXXXXX	₹7,42,225.35
	GST	1756490XXXXXX	₹1,33,599.05
	Total		₹1,06,55,431.50
202403260108800009795342804XXXXXX	Payment	1756491XXXXXX	₹5,592.08
2024032601107000097953427XXXXXX	Payment	1756490XXXXXX	₹4,333.39
202403260109400009795342352XXXXXX	Payment	1756490XXXXXX	₹5,505.31
2024032601089000097953422074XXXXXX	Payment	1756490XXXXXX	₹4,307.83
2024032601083000097953419810XXXXXX	Payment	1756490XXXXXX	₹5,841.27
2024032601108000097953417836XXXXXX	Payment	1756490XXXXXX	₹27,489.79
2024032601084000097953408470XXXXXX	Payment	1756490XXXXXX	₹3,672.00
202403260108900009795340101XXXXXX	Payment	420829089XXXXXX	₹5,179.38
202403260108400009795339902XXXXXX	Payment	1756490XXXXXX	₹4,032.00

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# 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

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## Refunds

DURATION  
Today, 28 Mar

REFUND TYPE  
Refund

STATUS  
All

SUB-STATUS  
All

Select FilterEnter Search Value

TOTAL REFUND AMOUNT  
₹40,80,416.07

TOTAL REFUND TRANSACTIONS  
670

Download

REFUND ID	REFUND DATE	PAYMENT ORDER ID	STATUS & SUB-STATUS	REFUND AMOUNT
2024032802091980104533688586	28 Mar, 01:45 PM	175853C	Refund accepted by Paytm Refund accepted by Bank	₹3,106.02
2024032802085980104474804817	28 Mar, 01:45 PM	175853C	Refund accepted by Paytm Refund accepted by Bank	₹1.00
202403280209698010445137199	28 Mar, 01:45 PM	175853C	Refund accepted by Paytm Refund accepted by Bank	₹1.00
202403280208698010409249389	28 Mar, 01:43 PM	174318C	Refund accepted by Paytm Refund pending at Bank	₹9,317.24
20240328021109801037869894E	28 Mar, 01:42 PM	175852C	Refund accepted by Paytm Refund accepted by Bank	₹12,644.49
2024032802085980103742097657	28 Mar, 01:42 PM	175853C	Refund accepted by Paytm Refund accepted by Bank	₹1.00
2024032802090980103556038782	28 Mar, 01:41 PM	175853	Refund accepted by Paytm Refund accepted by Bank	₹1.00

# Features of Refund

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

Latest version of the dashboard [Click here](#)

## Refunds

DURATION  
Today, 28 Mar

REFUND TYPE  
Refund

STATUS  
Success

SUB-STATUS  
All

TOTAL REFUND AMOUNT  
₹41,25,844.64

TOTAL REFUND TRANSACTIONS  
688

REFUND ID	REFUND DATE	PAYMENT ORDER ID	STATUS & SUB-STATUS
2024032802097980107041291149313	28 Mar, 01:55 PM	1754618	Refund accepted by Paytm Refund pending at Bank
2024032802097980106805189582849	28 Mar, 01:54 PM	175716	Refund accepted by Paytm Refund pending at Bank
2024032802086980106669382909953	28 Mar, 01:53 PM	175178	Refund accepted by Paytm Refund accepted by Bank
2024032802087980106599698202624	28 Mar, 01:53 PM	1758547037	Refund accepted by Paytm Refund accepted by Bank
2024032802109980106569822670849	28 Mar, 01:53 PM	1751956	Refund accepted by Paytm Refund accepted by Bank
2024032802081980106534506082305	28 Mar, 01:53 PM	1738191	Refund accepted by Paytm Refund accepted by Bank
2024032802086980106518975168512	28 Mar, 01:53 PM	1752156	Refund accepted by Paytm Refund accepted by Bank
2024032802106980106230083907585	28 Mar, 01:52 PM	1752891	Refund accepted by Paytm Refund accepted by Bank

Refund initiated

₹988.24

28 Mar 2024, 01:55 pm

[View Refund Update](#)

Refund to customer is under process

Refund Accepted by Paytm

at 01:55 pm, 28 Mar 2024

Refund pending at Bank

Once the Refund is accepted by the Bank, it will be credited to customer's account within 3 business days

Payment Refunded for

₹988.24 received on 25th Mar

[View Payment Details](#)

REFUND DETAILS

Order ID

\*\*\*\*\*618912

Transaction ID

\*\*\*\*\*383333

Refund ID

\*\*\*\*\*133333

Refunded To

Debit Card

CUSTOMER DETAILS

Customer ID

1754618912



# Steps to initiate Bulk Refund

**Step 1:** Click on bulk refund to see the process

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## Refunds

DURATION  
Today, 16 Apr

STATUS  
Success

SUB-STATUS  
All

Select Filter

Enter Search Value

TOTAL REFUND AMOUNT  
₹0.00

TOTAL REFUND TRANSACTIONS  
0

Bulk Refunds

Download

No refunds available for 16 April

# 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'

## ✕ Bulk Refunds

[Need Help?](#)

### How to initiate a bulk refund:

Download the sample file for bulk refunds. Fill the sheet with refund info.

File must include **TXN\_ID** and **REFUND\_AMOUNT** as header row

CSV file data must be **separated by comma(,)** and should have **empty line at the end**

Please note: Do not change the sheet column headers.

[Download sample file](#)

[New Bulk Refund](#)



No bulk refund data is available

# 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’

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DURATION

1 Nov, 00:00 AM - 30 Nov, 11:59 PM

STATUS

Success

TOTAL PAYMENTS

₹1.00

TOTAL TRANSACTIONS

1

TRANSACTION ID	DATE	ORDER ID
20231120011080000933435079944994024	20 Nov, 06:57 PM	202311201857450095

Need Help?

Payment Received

₹1.00

20 Nov 2023, 06:58 pm

FROM

9740214323

Paid Using Paytm Wallet

AMOUNT DETAILS

Payment Amount

₹ 1.00

Charges

- ₹ 0.02

Settled Amount

₹ 0.98

CUSTOMER DETAILS

Mobile Number

9740214323

Customer ID

N.A

PAYMENT DETAILS

Payment Option

Paytm Wallet 9740214323

Order ID

\*\*\*\*\*450095

Transaction ID

\*\*\*\*\*994024

Original Price

₹1

Need Help

Payment Received

₹1.00

Order ID: 202311201857450095 • 20 Nov 2023, 06:57 pm

Describe your issue

Briefly let us know what you need help with

Raise ticket

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# 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

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Disputes

TOTAL DISPUTES

5

TOTAL DISPUTE AMOUNT

₹36,077.24

Download Reports

New

Proofs Uploaded

Proofs Rejected

Disputes Lost

Disputes Won

DISPUTE ID	DUE DATE	ORDER ID	DISPUTE AMOUNT
2024040401 10:29 AM, 04 Apr	06 Apr, 11:59 PM	1755	₹7,564.60
2024040401C 10:29 AM, 04 Apr	06 Apr, 11:59 PM	1744026	₹7,711.20
2024040401C 10:29 AM, 04 Apr	06 Apr, 11:59 PM	17497	₹4,352.80
2024040401C 10:29 AM, 04 Apr	06 Apr, 11:59 PM	1741	₹5,254.79
202404040104 10:29 AM, 04 Apr	06 Apr, 11:59 PM	17646	₹11,193.85

# 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

The screenshot displays the Paytm Reports interface. On the left, a sidebar menu lists various sections: Dashboard, Analytics, Payments, Settlements, Refunds, Disputes, Reports & Invoices (highlighted with a red box), Invoices, Split Settlement Account, NCMC Recharge, Refund Advance Account, Deals Pre-buy, Bills & Collections, Accept Payments, AI Router, and Settings. The 'Reports & Invoices' section is expanded, showing a 'Reports' sub-item with a notification badge. The main content area is titled 'Reports' and features a 'Payment' report section (highlighted with a red box). This section includes a list of report types: Payment, Refund, VAS deduction, Settlement, Refund Advance Report, and Settlement (Historical upto 24 months). The 'Payment' report is selected, showing a 'Payment Reports' section with a 'Please note' message: 'Data Available for 6 months: 17 Oct' 23 - Today, Max Duration in a Single Report: 1 month'. Below this, there are three filter dropdowns: 'DURATION OF COLLECTIONS' (set to 'Yesterday, 15 Apr'), 'PAYMENT STATUS' (set to 'Success'), and 'VENDOR' (set to 'Choose Vendor'). A '+ Add Multiple Filters' link is also present. At the bottom of the filters, there are two buttons: 'Generate Report' (highlighted with a red box) and 'Send to Email'. To the right of the filters is a 'Select Download Fields' button. Below the filters, there is a section titled 'Recently Generated Reports' which contains a table with the following data:

REPORT GENERATION DATE	REPORT TYPE	DURATION	ACTIONS
16 Apr 2024	Payment Report Success payments	15 Apr 2024	

# 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

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## Bank Downtimes

[What are Bank Downtimes?](#)

DURATION  
This week

Select FilterEnter Search Value

Numbers of downtimes

UPI	DEBIT CARD	CREDIT CARD	NET BANKING	PAYTM WALLET
10	20	25	0	0

Download

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

The screenshot displays the Paytm Payments Services dashboard. On the left sidebar, 'Accept Payments' and 'Payment Links' are highlighted with a red box. The main header 'Payment Links' includes a 'How it works?' link. On the right, 'Reminder Settings', 'Bulk Links', and 'Create Payment link' (with a dropdown arrow) are visible. A dropdown menu from 'Create Payment link' shows two options: 'Quick Payment Link' (with a red checkmark) and 'Detailed Payment Link' (also with a red checkmark). Below this, a table lists payment links. The first row, highlighted with a red box, shows a 'Test' link with ID 687276623, created on 29 Mar, 11:27 AM, with an 'Inactive' status (marked with a red checkmark). The table has columns: LINK DESCRIPTION, LINK ID, CREATED ON, AMOUNT, and STATUS.

LINK DESCRIPTION	LINK ID	CREATED ON	AMOUNT	STATUS
Test https://paytm.me/OrzW-Ne	687276623	29 Mar, 11:27 AM	--	Inactive

# 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'

**paytm**  
for  
Business

Important Update

Dashboard

Accept Payments

Payment Links

Developer Settings

Settings

× Bulk Links

**How to initiate bulk link creation**

Download the sample file for creating payment links in bulk. Fill the sheet with the relevant details and upload the file to create & share links. You can create a maximum of 1,00,000 links in one go. Maximum file size allowed 5MB.

Please note: Do not change the sheet column headers.

Download sample file

Upload Bulk Link file

DATE SHARED

17 Mar to 16 Apr

No bulk payment data is available



# 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

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for Business

Important Update

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## Payment Links

[How it works?](#)

DURATION

17 Mar to 16 Apr

LINK TYPE

All

STATUS

All

LINK DESCRIPTION	LINK ID	CREATED ON	AMOUNT	STATUS
Test <a href="https://paytm.me/OrzW-Ne">https://paytm.me/OrzW-Ne</a>	687276623	29 Mar, 11:27 AM	--	Inactive

Reminder Settings

You can now send automated reminders to the customers to pay for unpaid links

SET UP A REMINDER SCHEDULE:

No. of days  
1

Select Schedule  
After date of iss...

No. of days  
1

Select Schedule  
Before date of e...

+ Add Reminder

Save Reminder Schedule

# 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

The screenshot displays the Paytm Business dashboard. The top navigation bar includes links for TEST DATA, PRODUCTS, PRICING, DEVELOPER, TRAINING VIDEOS, WHAT'S NEW, and NEED HELP?. The left sidebar lists various features like 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 content area is titled 'Payment Invoices' and shows filters for DURATION (19 May to 18 Jun) and STATUS (All). A search bar with 'Enter Search Value' and a 'Select Filter' dropdown are present. Below the filters, a summary table shows: INVOICE GENERATED (0) ₹0.00, PAID (0) ₹0.00, UNPAID (0) ₹0.00, and EXPIRED (0) ₹0.00. Two buttons, 'Bulk Invoice' and 'Create Invoice', are located at the bottom right of the summary section. A large graphic of an invoice with a paper plane icon is centered below the summary. At the bottom, the text 'Create Invoices to accept payments' is displayed, followed by the subtext 'Send Invoices to your customers and get paid instantly'.

**Payment Invoices**

DURATION: 19 May to 18 Jun | STATUS: All

Select Filter | Enter Search Value

INVOICE GENERATED (0)	PAID (0)	UNPAID (0)	EXPIRED (0)
₹0.00	₹0.00	₹0.00	₹0.00

Bulk Invoice | Create Invoice

**INVOICE**

Create Invoices to accept payments

Send Invoices to your customers and get paid instantly

# 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’

The image shows a screenshot of the Paytm Business dashboard. The top navigation bar includes links for TEST DATA, PRODUCTS, PRICING, DEVELOPER, TRAINING VIDEOS, WHAT'S NEW, and NEED HELP?. The main section is titled 'Payment Invoices' and displays a summary of invoice statistics: INVOICE GENERATED (0) ₹0.00, PAID (0) ₹0.00, UNPAID (0) ₹0.00, and EXPIRED (0) ₹0.00. Below this, there are buttons for 'Bulk Invoice' and 'Create Invoice', with red arrows pointing to them. A large 'INVOICE' icon with a paper plane symbol is also visible. The right sidebar shows the 'Create New Invoice' form, which includes fields for Customer Name, Mobile Number, and Email, as well as sections for INVOICE DETAILS, CUSTOMER DETAILS, and BILLING DETAILS. The 'Create Invoice' button is highlighted in blue.

# 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


Dashboard

Accept Payments

Developer Settings

Settings

 Profile

 Manage Users and Roles

Profile

Payment Settings







Settlement Settings

Account Details

Accepting payments with Paytm since August 2022

Payment

Acceptance limits for all types of methods is common.

PAYMENT INSTRUMENT	MONTHLY ACCEPTANCE LIMITS	PAYMENT CHARGES	STATUS
 UPI		1.99% + GST	ELIGIBLE
 Paytm Payments Bank		1.99% + GST	ACTIVE
 Paytm Wallet		1.7% + GST	ACTIVE
 Net Banking		1.99% + GST	ACTIVE
 Credit Card		1.75% + GST <a href="#">View Special Cards - Amex, Maestro, Master, Rupay, Visa</a>	ACTIVE
 Corporate Credit Card		2.5% + GST	ACTIVE

# 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

Dashboard

Accept Payments

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Settings

Manage Users and Roles

Profile


Payment Settings

Settlement Settings

Account Details

## Profile

SETTLEMENT BANK DETAILS



Bank Name

Bank IFSC Code

Bank Account Number

HDFC BANK

HDFC0000411

\*\*\*\*\*5200

You are currently not allowed to change your settlement bank account. Please contact our Helpdesk for further assistance

Help and Support

### Payout Transfer Settings

We are working to ensure that you receive various flavours of the payouts possible.

☐

Default Payout (Next Day Payout)

Payments will be settled to your bank account as per the default payout schedule i.e Next business day after a customer makes a payment.

How it works ?

☐

Same Day Payout

Payments will be settled to your bank account automatically on the same business day.

How it works ?

☐

On Demand Payout

Payments will be settled to your bank account on request.

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


Dashboard

Accept Payments

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 Profile

 Manage Users and Roles

Profile

Payment Settings

Settlement Settings

Account Details

MERCHANT DETAILS

Display Name

Merchant ID

Business Type

Selected Plan

Asi

GUxDKa:

Proprietorship

Enterprise

ACCOUNT DETAILS

PAN No.

GSTIN

BPSP\*\*\*\*6B

RESELLER DETAILS ⓘ

Name

Reseller ID

IDFC FIRST BANK

IDFCFi

REGISTERED ADDRESS

Office Address

kolkata Kolkata Kolkata West Bengal 700017

REPORT DETAILS

Report email ID

Edit Details

DISPUTE DETAILS

Dispute email ID

Add

# 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

Dashboard

Accept Payments

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Profile

Manage Users and Roles

## Manage Users and Roles

Users Roles



### Manage Sub-users

Add sub-users enables you to easily track daily sales and customer udhaar. Send payment reminders and receive payments directly in your bank account.

Add Bulk Users

+ Add new user

## Add new user

Full Name  
Test

Mobile Number  
Test@test.com

Add Email

ADD PRODUCT ROLE

Role  
Select Role

Administrator

Counter Cashier

Developer

Read Only

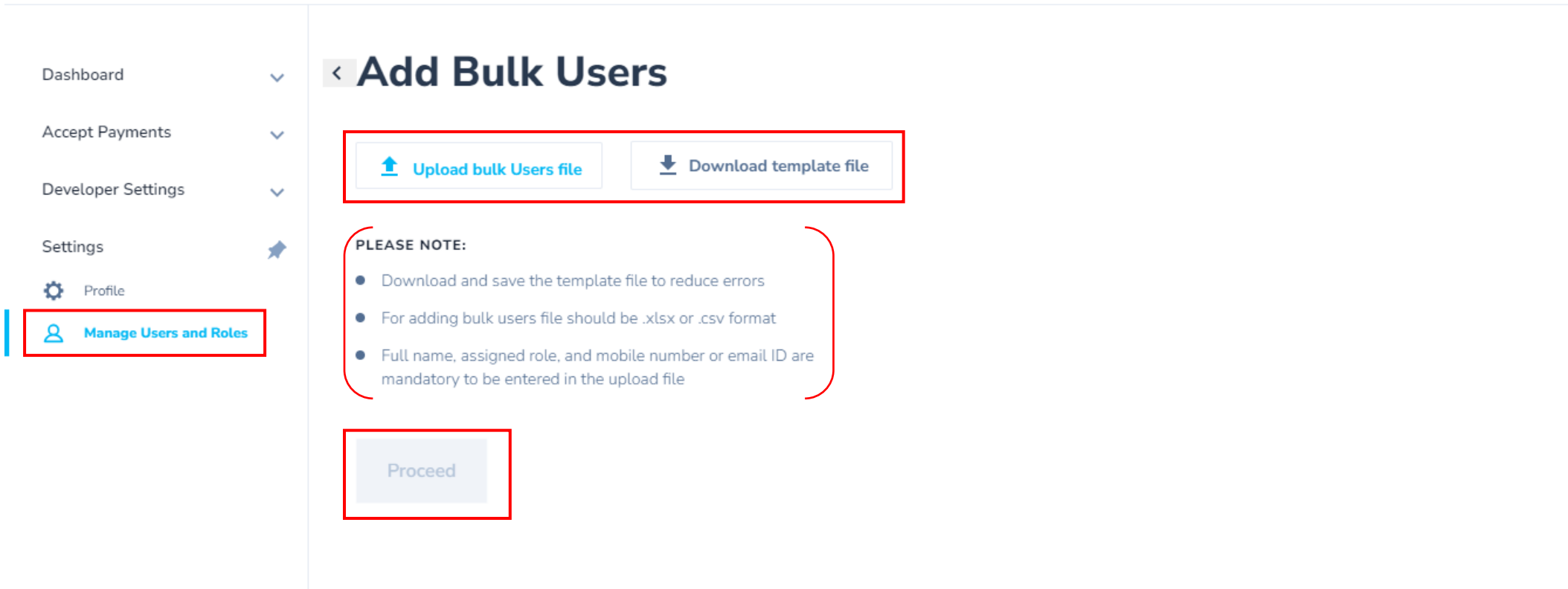
Add User

# 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



Dashboard
Accept Payments
Developer Settings
Settings
Profile
Manage Users and Roles

## < Add Bulk Users

Upload bulk Users file
Download template file

**PLEASE NOTE:**

- Download and save the template file to reduce errors
- For adding bulk users file should be .xlsx or .csv format
- Full name, assigned role, and mobile number or email ID are mandatory to be entered in the upload file

Proceed

# 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)

Dashboard

Accept Payments

Developer Settings

Settings

Profile

Manage Users and Roles

Manage Users and Roles

Users

Roles

Product

Create Role

	DEVELOPER	COUNTER CASHIER	READ ONLY	USER ADMINISTRATOR ⓘ	ADMINISTRATOR ⓘ
PAYMENTS					
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"/> View Link Transactions <input type="checkbox"/> Edit Link	<input checked="" type="checkbox"/> Create Link <input checked="" type="checkbox"/> Create Bulk Link <input checked="" type="checkbox"/> Share Link <input checked="" type="checkbox"/> View Link Transactions <input checked="" type="checkbox"/> Edit Link	<input type="checkbox"/> Create Link <input type="checkbox"/> Create Bulk Link <input type="checkbox"/> Share Link <input checked="" type="checkbox"/> View Link Transactions <input type="checkbox"/> Edit Link	<input type="checkbox"/> Create Link <input type="checkbox"/> Create Bulk Link <input type="checkbox"/> Share Link <input type="checkbox"/> View Link Transactions <input type="checkbox"/> Edit Link	<input checked="" type="checkbox"/> Create Link <input checked="" type="checkbox"/> Create Bulk Link <input checked="" type="checkbox"/> Share Link <input checked="" type="checkbox"/> View Link Transactions <input checked="" type="checkbox"/> Edit Link

# 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

## Create Role

Enter a name for this role

SELECT DASHBOARD ACCESS PERMISSIONS FOR THIS ROLE

PAYMENTS

Analytics

☐ View

Transaction

☐ Download
 ☐ Initiate Refund
 ☐ View

Settlement

☐ Download
 ☐ View

Disputes

☐ Appeal/Accept
 ☐ Download
 ☐ View

Payment Links

☐ Create Forms
 ☐ Edit Link
 ☐ View Link Transactions

☐ Share Link
 ☐ Create Bulk Link
 ☐ Create Link

Reports

☐ GST Invoice Download

Loyalty Points

☐ Redeem
 ☐ View

Refund

☐ Initiate Bulk Refund
 ☐ Download
 ☐ View

Refund Advance Account

☐ Withdraw
 ☐ View

COMMON SERVICES

API Keys

☐ View

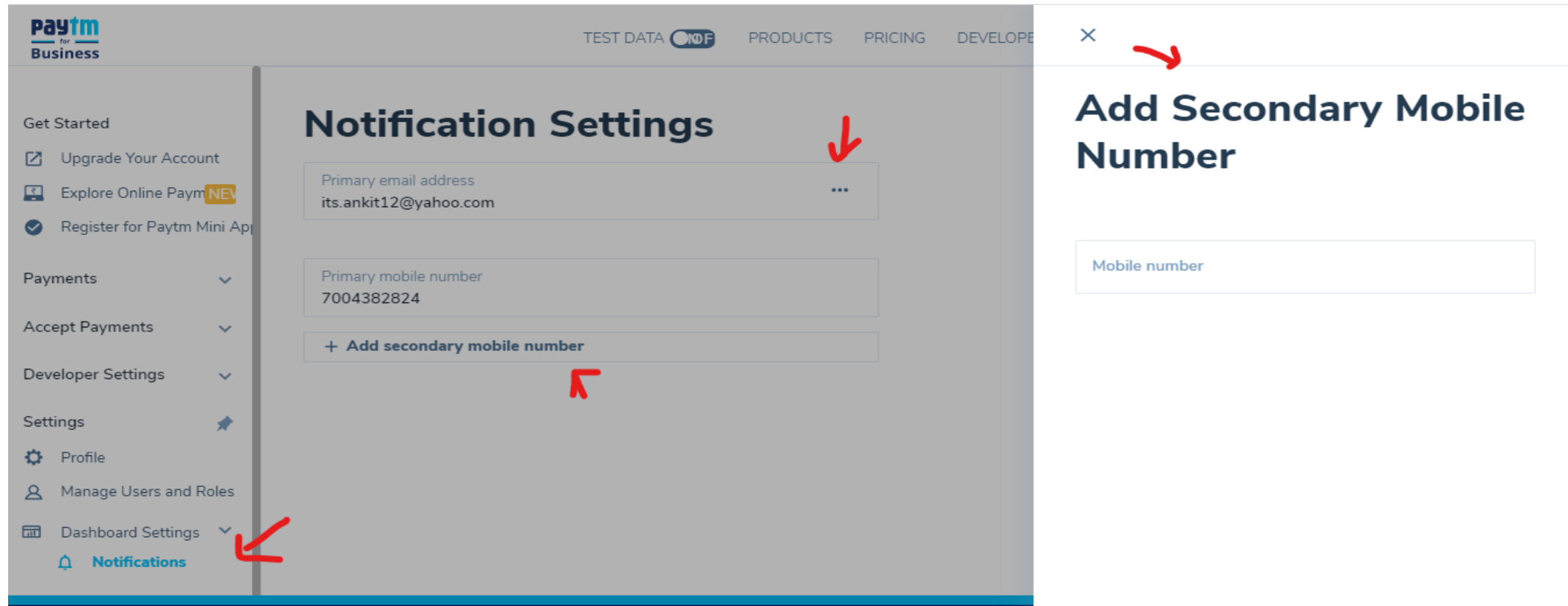
Profile

☐ Edit
 ☐ View

Create Role

# 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



The screenshot displays the Paytm Business dashboard interface. On the left, a sidebar menu includes options like 'Get Started', 'Payments', 'Accept Payments', 'Developer Settings', 'Settings', and 'Dashboard Settings'. The 'Dashboard Settings' option is highlighted with a red arrow. The main content area is titled 'Notification Settings' and contains fields for 'Primary email address' (its.ankit12@yahoo.com) and 'Primary mobile number' (7004382824). A red arrow points to the 'Add secondary mobile number' button. To the right, a modal window titled 'Add Secondary Mobile Number' is open, featuring a 'Mobile number' input field. A red arrow points to the close button (X) in the modal's header.

# 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

Dashboard
Analytics
Payments
Settlements
Refunds
Disputes
Reports & Invoices
Refund Advance Account
Accept Payments
Developer Settings
Settings

## Refund Advance Account

ACTIVE ACCOUNT

Current Account

A/C no. PSL02
IFSC: ICIC

Add Fund
Copy Details

AVAILABLE BALANCE FOR TRANSFER
₹0

DURATION
ORDER TYPE

Today, 17 Apr
All

No Transactions for selected duration

## Add Fund

₹0 Available Balance in Refund Advance Account

ACCOUNT DETAILS

Account Holder Name
Paytm Payments Services Limited

Account Number (VAN)
PSLL02844000004

IFSC Code
ICIC0000104

Copy Account Details

HOW IT WORK

- Transfer money to above account number using NEFT/IMPS/RTGS.
- We will credit your business account within 1 hour after we have received the funds.

WHY I HAVEN'T RECEIVED FUNDS?

- Fund transfers using NEFT/RTGs can take upto 2-3 hours to credit. As per revised RBI guidelines transfer will be 24x7 i.e., any time of the day and any day of the week.
- IMPS is a service provided by banks to ensure real-time interbank funds transfer and can take upto 1 hour to credit.
- Raise your concern at [payments.helpdesk@paytm.com](mailto:payments.helpdesk@paytm.com)

# How to withdraw money from Refund Advance Account

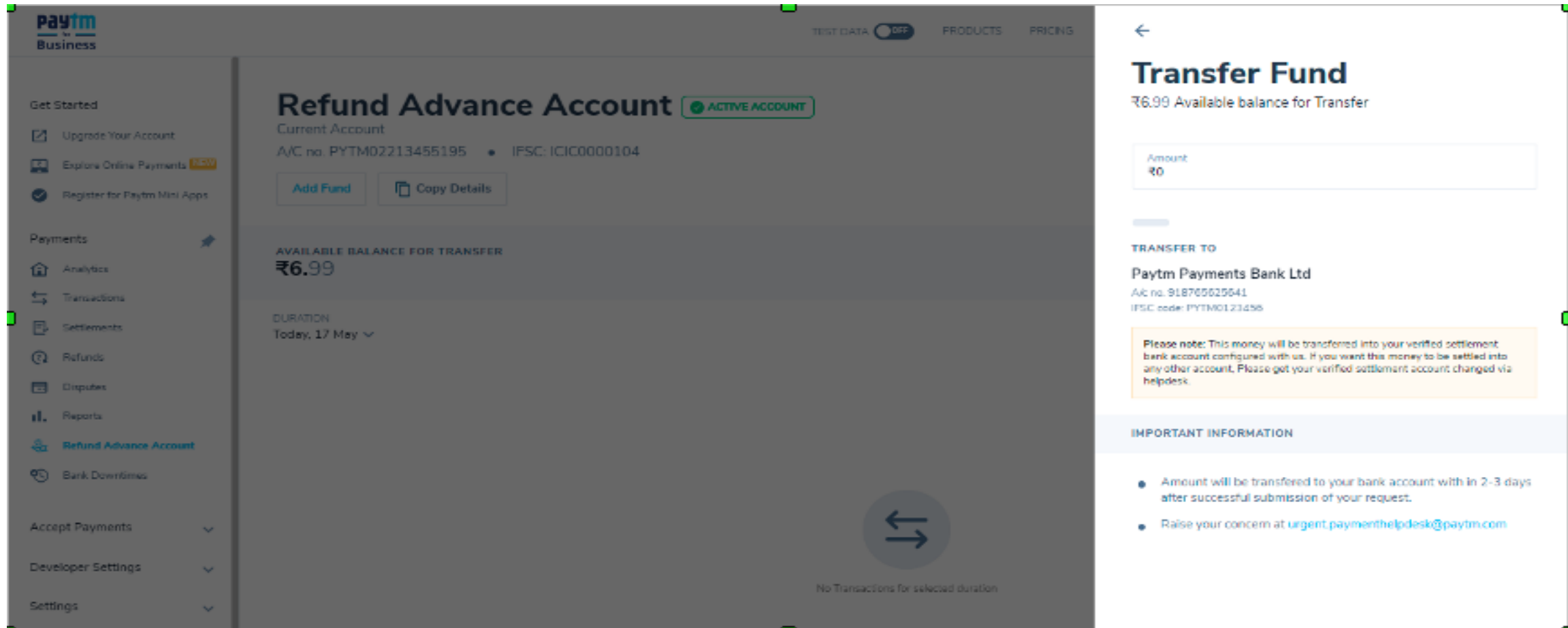
**Step 1:** Click on 'Transfer to Bank' option to proceed with withdrawal

**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'



The screenshot displays the Paytm Business dashboard for a Refund Advance Account. The account is active, with a current balance of ₹6.99 available for transfer. The interface includes a sidebar with navigation options like 'Get Started', 'Payments', and 'Accept Payments'. The main content area shows the account details, including the account number (PYTM02213455195) and IFSC (ICIC0000104). A 'Transfer Fund' section on the right allows users to enter an amount and select a bank for transfer. A note specifies that the money will be transferred to the verified settlement bank account within 2-3 days. The bottom of the screen shows a 'No Transactions for selected duration' message.

**Refund Advance Account** ACTIVE ACCOUNT

Current Account  
A/C no. PYTM02213455195 • IFSC: ICIC0000104

[Add Fund](#) [Copy Details](#)

**AVAILABLE BALANCE FOR TRANSFER**  
₹6.99

**DURATION**  
Today, 17 May

**TRANSFER TO**  
Paytm Payments Bank Ltd  
A/c no. 918705025641  
IFSC code: PYTM0123456

**Please note:** This money will be transferred into your verified settlement bank account configured with us. If you want this money to be settled into any other account, Please get your verified settlement account changed via helpdesk.

**IMPORTANT INFORMATION**

- Amount will be transferred to your bank account with in 2-3 days after successful submission of your request.
- Raise your concern at [urgent.paymenthelpdesk@paytm.com](mailto:urgent.paymenthelpdesk@paytm.com)

No Transactions for selected duration

# 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

NEED HELP?

U

Dashboard
Analytics
Payments
Settlements
Refunds
Disputes
Reports & Invoices
Refund Advance Account
Accept Payments
Developer Settings

## Help & Support

Select your Issue Category

Settlements

Refunds

Payments

Account and Settings

Reports

Payment Solution

DURATION
1 Nov, 00:00 AM - 30 Nov, 11:59 PM

STATUS
Success

Select Filter
Enter Search Value

TRANSACTION ID	DATE	ORDER ID	PAYMENT SOURCE	AMOUNT
20231120011080000933435079944994024	20 Nov, 06:57 PM	202311201857450095	Paytm Wallet	₹1.00

Need Help with other payment related issues?

View Payments Related 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

- Dashboard ▾
- Accept Payments ▾
- Developer Settings ▾
- Settings ▾

## Account and Settings related FAQs

### Popular topics

- How do I update my bank account details? >
- What are the different pay modes through which I can accept a payment? >
- How can I increase my payment acceptance limit? >
- How can I reset the password for my merchant dashboard? >
- Why am I not receiving transaction/payout alerts? >
- Where can I access the QR code for accepting payments? >
- Can multiple users access my merchant dashboard? >

Need to get in touch with us?

[Raise a Ticket](#)



### Raise Ticket

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

Email ID  
Asifalamkhn@gmail.com

Communication will be sent here

Describe your issue




[Raise Ticket](#)

# 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

## Support Tickets

### Active Support Tickets



Account and Settings  
Related Issue


Open • Ticket ID: 5094378075

17:22 PM, 17 Apr

>

### Closed Support Tickets

[View All >](#)




Call back request

Account and Settings  
Related Issue

Closed • Ticket ID: 5094377612

17:17 PM, 17 Apr

>




Call back request

Settlement Related Issue

Closed • Ticket ID: 5094207493

11:56 AM, 15 Apr

>




Settlements Related Issue

Closed • Ticket ID: 5093407240

13:35 PM, 04 Apr

>




Account and Settings  
Related Issue

Closed • Ticket ID: 5090712263

14:26 PM, 07 Mar

>




Payments Related Issue

Closed • Ticket ID: 5090711799

14:22 PM, 07 Mar

>



Settlements Related Issue

Closed • Ticket ID: 5090701074

13:52 PM, 07 Mar

>

# THANK YOU!

