



Paytm Procure



**The simple way
of engaging
with Partners.**

Vendor Training Manual

By,

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Paytm Procure Tool

Paytm Procure is a digital trade payables automation tool that streamline an organization's "Procure to Pay" business cycle resulting in tangible saving & an improved partner ecosystem.

Objective/Purpose

Purpose of Vendor Training Manual is to Help the Vendors to Navigate on Paytm Tool and Guide the Steps to be Performed in Different Scenarios

Important Information About Tool

Paytm Portal URL- <https://paytm.myndsaas.com/>

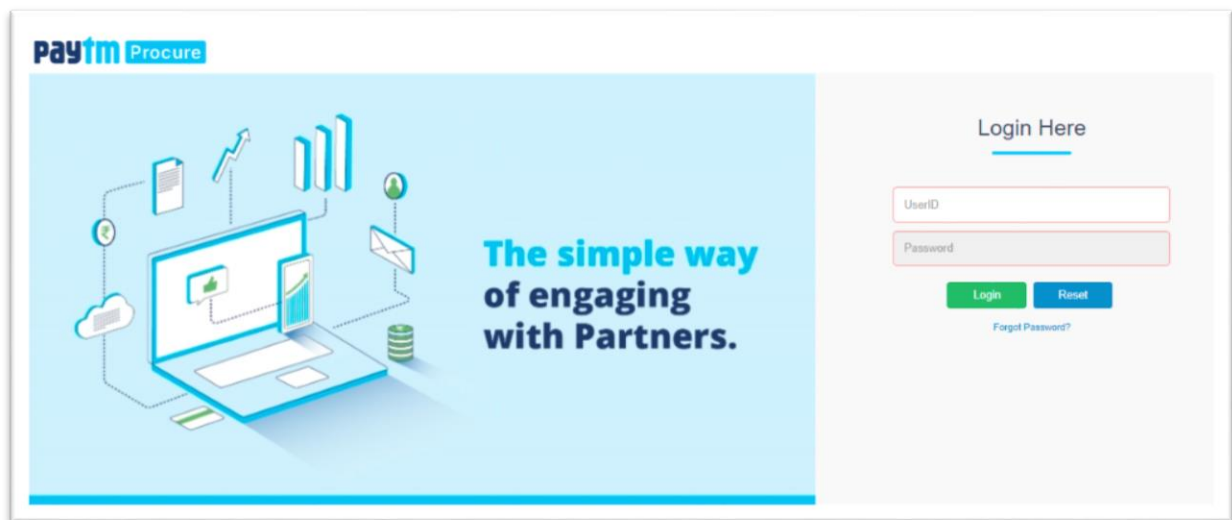
Notification Mail – All Notification Mail will be sent from no-reply.purchase@paytm.com

Raise your Query - Please write to us on procuresupport@paytm.com and mention your Concern in subject for faster closer on your requests
you will get response from Procure support within 1 working day

Paytm Procure Login Screen

1 - Enter Url <https://paytm.myndsas.com>

2- Enter User ID and Password



The screenshot displays the Paytm Procure login interface. On the left, a blue banner features a laptop with various business icons (chart, bar graph, mail, cloud, database) and the text "The simple way of engaging with Partners." The right side is a white login panel with the "paytm Procure" logo at the top. Below the logo is the text "Login Here" with a blue underline. It contains two input fields: "UserID" and "Password". Below these fields are two buttons: a green "Login" button and a blue "Reset" button. At the bottom of the panel is a link that says "Forgot Password?".

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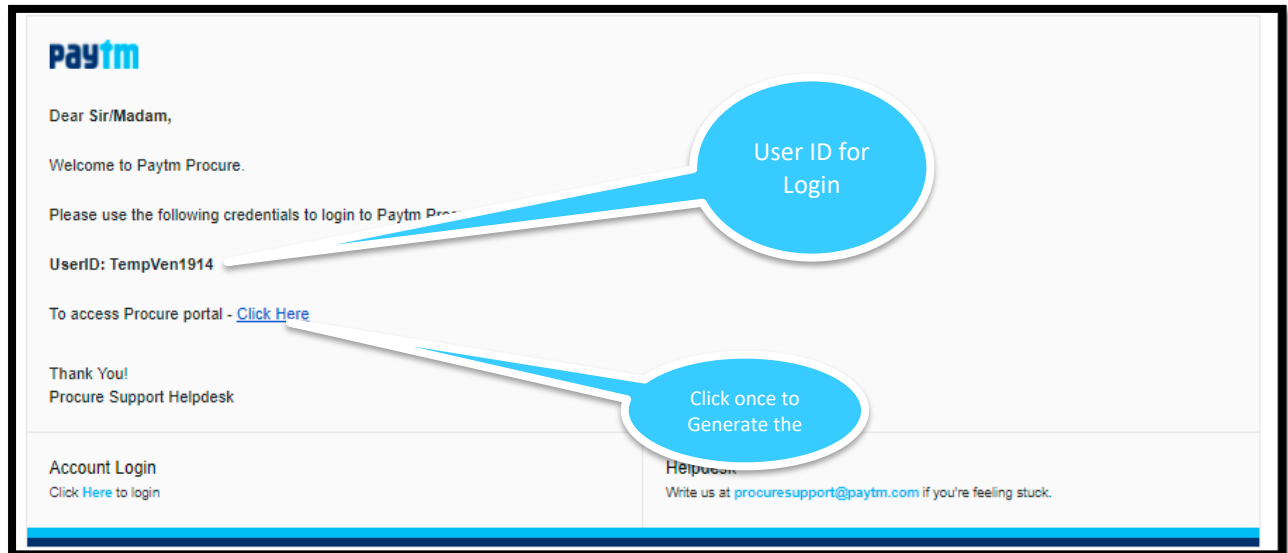
Vendor Registration

Notification Mail to Vendor "Welcome to Paytm"

- Subject of notification mail "Welcome to Paytm"

How to Login into the Portal

- Vendor will receive notification mail along with Procure Tool Login id and password set up link on registered email id
- Vendor need to click on link to set the password



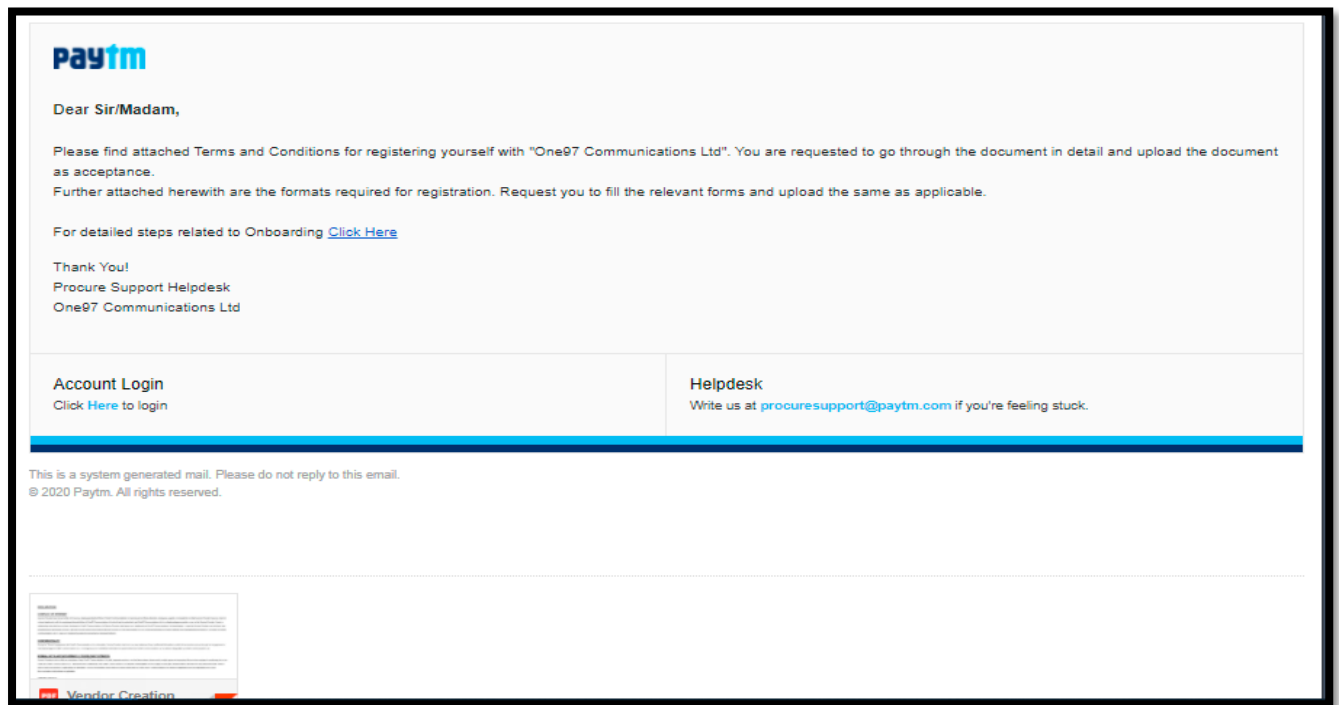
Vendor Registration - Password Creation Screen

- Vendor need to click on link given in mail to set the password of Tool
- Link will get expire while click twice
- Vendor can set the password as per his/her choose by following the mandatory steps

The screenshot shows the 'Password Reset' screen. It has a header 'paytm Procure Password Reset'. Below the header, it says 'Setup a new Password or reset the existing one for login. The Password field is case sensitive.' There are two input fields: '*Enter Password [?] :' and '*Confirm Password [?] :'. A callout bubble points to both fields with the text 'Enter Password and Confirm Password here'. Below the fields is a green 'Submit' button. A callout bubble points to the 'Submit' button with the text 'After Entering the Password click on Submit'. At the bottom, there are two checkboxes: 'Password should contain minimum "5" and maximum "10" characters' and 'Password Policy is "ALPHA NUMERIC WITH SPECIAL CHARACTER"'. Both checkboxes are currently unchecked.

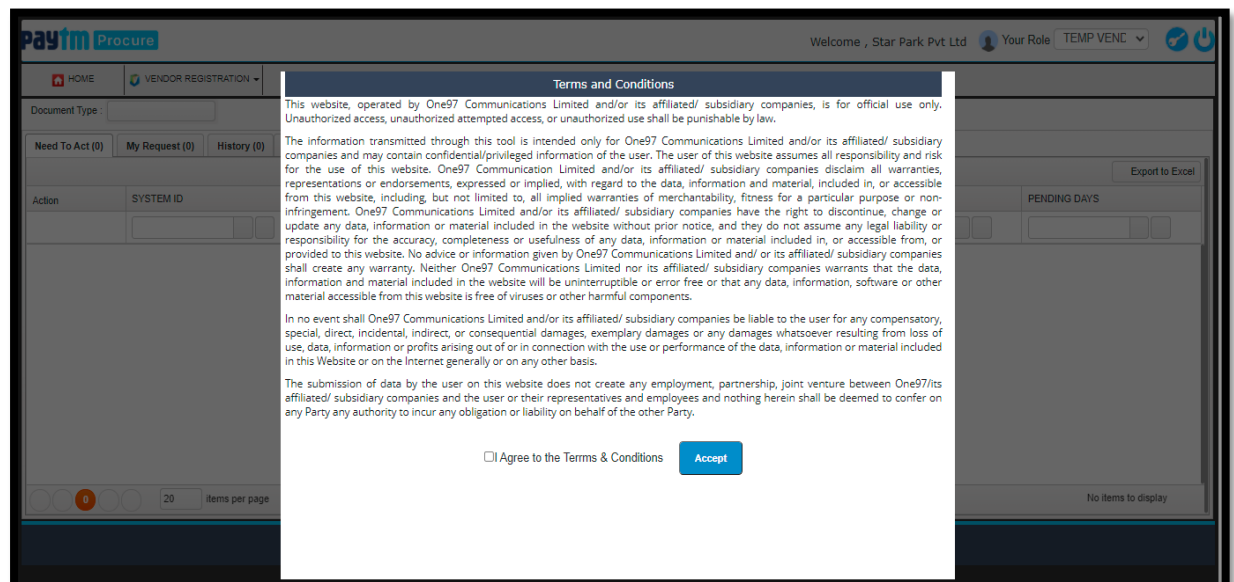
Notification Mail to Vendor Along With Terms and Condition Document

- Vendor will receive one more mail along Term & condition documents
- Vendor need to attached this T&N document while uploading the document for registration on Portal



Vendor Registration - Vendor Portal Term and Condition Screen

- Vendor need to login the Tool through login id and password
- Vendor need to accept term and condition while login portal first time



Vendor Registration - Vendor Home Page

- Vendor Home Page consist multiple Tabs, menu, password change option etc.
- Vendor need to click on vendor registration for uploading the document

Vendor Registration – Document Uploading Screen

- Vendor need to click on vendor registration for uploading the document
- Vendor need to fill all mandatory detail in form and after filling all detail click on save button to submit the request for validation
- Note: All grey coloured field are Non- Editable at Vendor end

Vendor Registration – Mandatory and Non-mandatory Field for Registration

There multiple field on registration screen which mandatory and non- mandatory as per below mention list for Domestic and International Vendors

Field Name	Field Type	Mandatory Status for Domestic Vendor	Mandatory Status International Vendor
Request ID*	Non-Editable	Yes	Yes
Company Code*	Non-Editable	Yes	Yes
Vendor Type*	Non-Editable	Yes	Yes
Request Type*	Non-Editable	Yes	Yes
Vendor Name	Text	No	No
Street1*	Text	Yes	Yes
Street2	Text	No	No
Street3	Text	No	No
PIN*	Text	Yes	Yes
City*	Text	Yes	Yes
Country*	Predefined	Yes	Yes
State*	Predefined	Yes	Yes
Region Code	Non-Editable	Yes	Yes
Telephone	Text	No	No
Mobile*	Text	Yes	Yes
Email	Text	No	No
Type of Service*	Predefined	Yes	Yes
Other Service Description*	Text	Yes	Yes
Currency*	Predefined	Yes	Yes
Bank Key (IFSC Code)*	Text	Yes	Yes
Bank Account No*	Text	Yes	Yes
Account Holder Name*	Text	Yes	Yes
Cancel Cheque Copy	Attachment	Yes	No
PAN	Text	Yes	No
PAN Copy	Attachment	Need to Discuss	No
GST Status*	Predefined	Yes	Yes
GST No	Text	Yes	No
GST Declaration	Attachment	Yes	No
Incorporation Certificate	Attachment	Need to Discuss	No
GST Certificate	Attachment	Yes	No
Organization Type*	Predefined	Yes	Yes
MSME Registered	Predefined	Yes	No
MSME Declaration	Attachment	Yes	No
MSME Certificate	Attachment	Yes	No
TRC certificate or declaration	Attachment	No	Yes
Tax Registration Certificate Number	Text	No	Yes
No permanent Establishment Declaration	Attachment	No	Yes
Organization Regn Certificate	Attachment	Need to Discuss	No
Dispatch Through	Text	Yes	No
Dispatch Ref Number	Text	No	No
Dispatch Date	Predefined	No	No
Incase PAN is not available TDS at higher level will be deducted	Check Box	Yes	No
Physical documents (NEFT Cancelled cheque copy) to be submitted with 7 days to avoid rejection	Check Box	Yes	No
Terms and Conditions*	Attachment	Yes	Yes
KYB Form*	Attachment	Yes	Yes
ITR in previous two FY with in due date us 139(1)	Predefined	Yes	No
Copy of ITR in previous two FY with in due date us 139(1)	Attachment	Yes	No

Total TDS or TCS for each of the FY was Rs.50000 or more	Predefined	Yes	No
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Vendor Registration - Confirmation Screen

- After filling all detail and upload documents vendor need to click on save button to Submit the request
- After submitting the request confirmation screen will appear with unique doc id and VRF no.

Vendor Registration - Save as Draft Option

- Vendor can use save as draft option before final submission of request
- Vendor can edit and submit the request from save as draft bucket as per requirement

Vendor Registration - Vendor Draft Bucket

- Vendor need to click on draft bucket and then on edit/delete to edit the request

The screenshot shows the 'Vendor Registration' section in the Paytm Procure portal. The user is logged in as 'Star Park Pvt Ltd' with the role 'TEMP VEND'. The interface includes a navigation bar with 'HOME' and 'VENDOR REGISTRATION' tabs. Below the navigation bar, there are filters for 'Document Type: Vendor Registration' and tabs for 'Need To Act (0)', 'My Request (0)', 'History (0)', and 'Draft (1)'. The 'Draft (1)' tab is active, showing a table with one draft request. The table has columns for Action, Request ID, Company, Vendor Name, Vendor Email, Pending Days, and Status. The draft request has a Request ID of 'TempVen1912', Company 'One97 Communications Ltd', Vendor Name 'Star Park Pvt Ltd', Vendor Email 'arpit.sharma@myndsol.com', and Status 'UPLOADED'. There are 'Edit' and 'Delete' buttons for this request. At the bottom, there is a pagination bar showing '1 - 1 of 1 items' and a '20 items per page' selector.

Action	Request ID	Company	Vendor Name	Vendor Email	Pending Days	Status
Edit Delete	TempVen1912	One97 Communications Ltd	Star Park Pvt Ltd	arpit.sharma@myndsol.com		UPLOADED

Vendor Registration – Resolution Stage Post Reconsider of Request

Vendor Registration Resolution - Notification Mail to Vendor Post Reconsider of Request

- Vendor Will receive notification mail along with reconsider remarks on registered E-mail id
- Vendor need to check the remarks and edit the request by login into the portal

The screenshot shows a notification email from Paytm Procure. The email is addressed to 'Dear Sir / Madam,' and informs the vendor that their request for 'ON Boarding' for 'Star Park Pvt Ltd' with 'One97 Communications Ltd' as the vendor is currently 'ON HOLD' due to a missing 'GST Certificate'. Below the text, there is a table with the vendor's details. At the bottom, there is a 'Thank You!' message and contact information for the Procure Support Helpdesk. The footer includes an 'Account Login' link and a 'Helpdesk' email address.

Login ID	TempVen1912
Vendor Name	{Vendor Name}
Address	GURGAON
City	GURGAON
State	Haryana
Country	India
Mobile	09953612469
Email	arpit.sharma@myndsol.com
Type of Service	Admin
PAN	ERTY2323TR
GST No	09ERTYU2323HTGY

Thank You!
Procure Support Helpdesk
One97 Communications Ltd

Account Login
Click [Here](#) to login

Helpdesk
Write us at procuresupport@paytm.com if you're feeling stuck.

Vendor Registration Resolution - Vendor Home page

- Vendor need to login into the portal and check need to act bucket and then click on view detail to edit the request

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Welcome , Star Park Pvt Ltd | Your Role | TEMP VEND

HOME | VENDOR REGISTRATION

Document Type : Vendor Registration

Need To Act (1) | My Request (1) | History (1) | Draft (0)

Export to Excel

Action	Request ID	Company	Vendor Name	Vendor Email	Pending Days	Status	Un
View Details	TempVen1912	One97 Communications Ltd		arpit.sharma@myndsol.com	3	UPLOADED	33

1 - 1 of 1 items

Vendor Registration Resolution - Request Doc Detail Page

- Vendor has three option on doc detail page Submit, cancel and edit
- Vendor need to click on edit button to edit the request.
- Vendor need to click on cancel button to delete the request
- Vendor need to click on submit button for final submission after editing the request for

paytm Procure

SUBMIT | CANCEL | Edit

CURRENT

Vendor Registration - [System Document ID: 3346626] LoggedIn User : [Star Park Pvt Ltd] | Role : [TEMP VENDOR]

Vendor Details

Created By	Star Park Pvt Ltd - arpit.sharma@myndsol.com	Creation Date	28/06/21 - 17:50:52
Current Status	UPLOADED	Request ID	TempVen1912
Company Code	One97 Communications Ltd	Vendor Type	Domestic
VRF Number	VRF1507	Vendor Name	
Street1	GURGAON	Street2	
Street3		PIN	122001
City	GURGAON	State	Haryana
Region Code	06	Country	India
Telephone		Mobile	09953612469
Email	arpit.sharma@myndsol.com	Type of Service	Admin
PAN	ERTY2323TR	PAN Copy	
GST Status	Registered	GST Declaration	
GST No	09ERTYU2323HTGY	GST Certificate	View Attachment
Tax Registration Certificate Number		TRC certificate or declaration	
No permanent Establishment Declaration		Incorporation Certificate	
Organization Type	Company	Organization Regn Certificate	
Bank Key (IFSC Code)	YES00000177	Bank Account No	0353535325
Cancel Cheque Copy	View Attachment	Account Holder Name	Vikram
Currency	INR	MSME Registered	Yes
MSME Declaration		MSME Certificate	View Attachment
Dispatch Through	Bluedart	Dispatch Ref Number	
Dispatch Date	28/06/21	VP Validation Reconsider Remarks	GST Certificate is Missing
Vendor Creation Requested by	Sunny Chauhan	Vendor Creation Requester Email	sunny.chauhan@paytm.com
House Bank		Incense PAN is not available TDS at higher level will be deducted	Yes
Terms and Conditions	View Attachment		

Vendor Registration Resolution – Request Edit Screen

- After clicking on edit button edit screen will open, vendor now able to edit the request
- Vendor need to check the reconsider remarks and edit the request.
- Vendor need to click on save button after editing the request and then click on submit button for final submission

[illegible]

Vendor Registration Resolution - Request Submit Screen

- After saving the request vendor need to submit the request and also mention the submit remarks

paytm Procure

SUBMIT CANCEL Edit

CURRENT

Vendor Registration - [System Document ID: 3346626] LoggedIn User : [Star Park Pvt Ltd] | Role : [TEMP VENDOR]

Vendor Details ▾

Created By	Star Park Pvt Ltd – arpit.sharma@myndsol.com	Creation Date	28/06/21 – 17:50:52
Current Status	UPLOADED	Document ID	Temp/Ven1912
Company Code			Domestic
VRF Number			122001
Street1			Haryana
Street3			India
City			09953612489
Region Code			Admin
Telephone			[View Attachment]
Email			
PAN			
GST Status			
GST No.			
Tax Registration Certificate			
No permanent Establishment Organization			
Bank Key (IFSC Code)	YES0000177	Bank Account No	0353535325
Cancel Cheque Copy	[View Attachment]	Account Holder Name	Vikram
Currency	INR	MSME Registered	Yes
MSME Declaration		MSME Certificate	[View Attachment]
Dispatch Through	Bluedart	Dispatch Ref Number	
Dispatch Date	28/06/21	VP Validation Reconsider Remarks	GST Certificate is Missing
Vendor Creation Requested by	Sunny Chauhan	Vendor Creation Requester Email	sunny.chauhan@paytm.com
House Bank		Incase PAN is not available TDS at higher level will be deducted	Yes
Terms and Conditions	[View Attachment]		

Vendor Registration Resolution - Request Reject Screen

- Vendor need to click on cancel button for rejecting the request permanently

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SUBMIT CANCEL Edit

CURRENT

Vendor Registration - [System Document ID: 3346625] LoggedIn User : [Star Park Pvt Ltd] | Role : [TEMP VENDOR]

Vendor Details

Created By	Star Park Pvt Ltd - arpit.sharma@myndsol.com	Creation Date	28/06/21 - 17:50:52
Current Status	UPLOADED	Request ID	TempVen1912
Company Code	One97 Communications Ltd	Vendor Type	Domestic
VRF Number	VRF1507	Vendor Name	
Street1	GURGAON	Street2	
Street3		PIN	122001
City			Haryana
Region Code			India
Telephone			09953612469
Email			Admin
PAN			
GST Status			
GST No	09ERTYU2323HTGY	GST Certificate	View Attachment
Tax Registration Certificate Number		TRC certificate or declaration	
No permanent Establishment Declaration		Incorporation Certificate	
Organization Type	Company	Organization Regn Certificate	
Bank Key (IFSC Code)	YES00000177	Bank Account No	0353535325
Cancel Cheque Copy	View Attachment	Account Holder Name	Vikram
Currency	INR	MSME Registered	Yes
MSME Declaration		MSME Certificate	View Attachment
Dispatch Through	Bluedart	Dispatch Ref Number	
Dispatch Date	28/06/21	VP Validation Reconsider Remarks	GST Certificate is Missing
Vendor Creation Requested by	Sunny Chauhan	Vendor Creation Requester Email	sunny.chauhan@paytm.com
House Bank		Incase PAN is not available TDS at higher level will be deducted	Yes
Terms and Conditions	View Attachment		

Permanent Document

Submitter Cancellation Remarks*

Reject

Purchase Order Acceptance Stage

- Vendor will accept the Purchase Order on Portal and Post PO acceptance also upload the invoice

Notification Mail to Vendor for Purchase Order Acceptance

- Vendor will receive notification mail that PO has raised for his/her acceptance

paytm

Dear Branding Venue,

This is to inform you that Purchase Order PO No. - "2300003403" is sent to you for your acceptance. Details of the same are mentioned below:

Processed/Approved By	MDM SAP
Ref. PO No.	OCL0PO400003403
PO Date	20/03/21
Bill To Location	OC01-OCIL- DELHI-New Delhi
PR Number	OCL0PR100002904
Account Ass Cat.	K-Cost center
Cost Center	3RDPARTYOF-3RDPARTYOF
Currency	INR
Total Amount	32000

Awaiting your acceptance within the SLA period.
To see a detailed PO and to Accept/Reject the same, please login to procure portal.

Purchase Order Acceptance – PO Acceptance Screen

- Vendor Need to check PO and then click on accept button
- Vendor need to tick the check boxes before accepting the PO

Accept Document

PO QTY are checked and agreed* ☒

Item rate in PO is checked and agreed* ☒

Accept Terms and Conditions* ☒

GSTN Checked and correct* ☒

Others* ☒

Accept

Notification Mail to Vendor Post PO Acceptance

- Post PO acceptance vendor will receive notification mail along with PO pdf attachment

Dear Sir/ Madam,

This is to inform you that Purchase Order has been accepted by the Vendor. Details of the same are mentioned below:

Processed/Approved By	Branding Venue
PO Number	OCL0PO400003403
PO Date	20/03/21
Bill To Location	OC01-OCIL- DELHI-New Delhi
Valid From	{Valid From}
Valid To	{Valid To}
Cost Center	3RDPARTYOF-3RDPARTYOF
Total Amount	32000

Thank You!

Purchase Order Acceptance – PO Dispute Screen

- If vendor found any mismatch in PO, then vendor can also reconsider the same
- Vendor Need to click on Dispute button and mention rejection remarks and click on Raise Dispute button to reconsider the PO

PO Details			
Created By	Harshit Swami-arpt.sharma@myndool.com - arpt.sharma@myndool.com		
Current Status	Vendor Acceptance		
PO Date	20/03/21		
Department	3P Offline Payments - QR		
Category	Store Merchandise		
Sub Category	Others		
Purchase Type	Merchandise		
Vendor Name	0000311331		
Vendor MSME Registered	27BCFFR306R1ET		
Vendor State	Yes		
Accepter	INR		
Invoice Nature	30/03/21		
Service Valid To	0001-OCIL-DELHI-New Delhi		
Ship To Location			
Valid From			
Dispute in PO			
Action for Dispute resolution			
PO QTY are checked and agreed			
Accept Terms and Conditions			
Dispute Remarks by Vendor			
Total Amount	32000		
Detailed Specification	2045-45 Days from Goods Receipt/Invoice whichever later		
V1 Payment Terms	37790.0		
PO Total Amount	Kumel - ONE97 Communications		
Ship to Text	Mundka		
Ship to Text_2			
General Comment			

Vendor Invoice – Invoice Uploading Process

Vendor Invoice – Vendor Home Page

- After accepting Purchase order on tool vendor able to upload the invoice on same Portal
- Vendor need to click on vendor invoice under document menu

Document Type: **Vendor Invoice**

Need To Act (0) | Draft (0)

Action	PO Number	Company Name	Vendor Name	Department	Pending Days	Status	Unique ID
No records available							

Document Type – Select the document to view the transactions like Purchase Order and Vendor Invoice

- **Need to Act**—Shows transaction on which user has to take action like acceptance of Purchase Order and resubmission of vendor invoice
- **My Request**—Shows status of transactions created by Vendor
- **History**—Shows action taken by Vendor on all the transactions (*Need to act and My request combined*)

Vendor Invoice – Steps for Uploading the Invoice on Portal

- ☐ *Marked Field are Mandatory And Other Filed are Non- Mandatory.
- ☐ Grey Field are Non-Editable at Vendor End.
1. Login Into the Portal
 2. Click on Vendor Invoice Under Document Menu
 3. Select PO from Drop down list
 4. Fill all Mandatory Field on uploading screen and in Invoice Line Item as per Invoice and Purchase Order
 5. After Filling all Inputs Click on Calculate Button to Check the Total Amount and Tax
 6. In Last Click on Submit Button

Septs for Uploading Invoice If there is Multiple Line Item In PO

Step 1 – Identify the Require line item and Tick the Check Box

Step 2- Click on Filter Button

Step 3- Fill Detail in line Item and click on Submit Button

Vendor Invoice - Invoice Uploading Screen

- Vendor need to fill all mandatory detail on Uploading screen as per PO and invoice
- After filling all detail need to click on save button for final submission

Vendor Invoice

Vendor Name*	BRANDING VENUE 000011331	Vendor Code	000011331	BCFPR306R
Vendor GSTIN	27BCFPR306R1ZT	Vendor GSTIN Status		Yes
PO NO*	2300034060	PO Amount WO Tax	10500	
PO Valid To		Currency*	INR	15/03/21
Company Name*	OCL ONE47 COMMUNICATIONS	Department*	3P Office Payments - QS	BANGALORE WH
Bill To Location	OCISD OCL KARNATAKA Bengal	Bill To GSTIN	23AACCO490TA1Z1	20-21/0678
Invoice Date*	15/05/21	Invoice Attachment*	[Choose File] No file open	Other Optional Document
Invoice is Digitally signed*	Yes	Invoice is as per PO terms and description only*	<input checked="" type="checkbox"/>	Service Period From
Service Period To	30/05/21	Dispatch Date	15/05/21	Dispatched Through
Dispatch Socket No	353495	Dispatch Remarks		Bludart
Total Tax Amount*	103	Total Invoice Amount*	1239	Invoice amount without Tax*
Material_Service Description	House keeping Service			1050

Select PO Here

All Grey Cell are non editable and will fill auto Post PO Selection

Scroll Line Item to Left Hand Side and Fill HSN Code, Tax Type, Tax Rate and Invoice Quantity

Line Item	PO No.	Alt No.	Material Code	Material Name	UOM	Plant	PO Qty	Adjusted Qty	HSN SAC Code	Tax Code	Tax Type	To Ship	In Shd	Receipt	HSN SAC Code per receipt	To Ship per invoice	To Ship receipt	In Shd	Receipt	To Ship	In Shd
1	2300034060	PTR110437	0000000540	Merchant kit	EA each	OCISD OCL KAR.	500	500	0915	2C GST Input Cn.	GST										

Click Here to Calculate

Click Here to submit the invoice

Vendor Invoice – Mandatory and Non-Mandatory Fields

Mandatory
• PO NO*
• Invoice No*
• Invoice Date*
• Invoice Attachment*
• Invoice is Digitally signed*
• Invoice is as per PO terms and description only*
• HSN SAC Code As per Invoice*
• Tax type as per Invoice*
• Tax Rate as per Invoice*
• Inv Qty*

Non-Mandatory
• Other Optional Document
• Service Period From
• Service Period To
• Dispatch Date
• Dispatched Through
• Dispatch Docket No
• Dispatch Remarks
• Material Service Description

Vendor Invoice - Confirmation Screen

- Post final submission of invoice confirmation screen will appear along with doc id will

Confirmation Mail to Vendor - Post Invoice Submission

- Vendor will receive confirmation mail that invoice has been successfully submitted on Portal post

Processed/Approved By	Branding Venue
Vendor Name	Branding Venue
Ship to Location	Bangalore WH
PO Currency	INR
Invoice Date	27/05/21
Invoice Amount without Tax	66
Total Tax Amount	11.88
Total Invoice Amount	77.88
PO NO	2300099958

Please ensure that hard copy of Invoice and related supporting documents are submitted/couriered at our office address within 5 days of receiving this email. Your invoice will be processed post receipt of Hardcopies only. Date of receipt of hardcopy of will be considered as "Day 1" to process the invoice. Invoice/Documents should be addressed to "Vendor Helpdesk Team" at below address.
One 97 Communications
B121 Sector 5
Noida
201301

Thank You!
Procure Support Helpdesk
One97 Communications Ltd

Account Login
Click [Here](#) to login

Helpdesk
Write us at procuresupport@paytm.com if you're feeling stuck.

How to Upload Multiple/Single Invoice Against Purchase Order with Multiple Line Item

- Vendor need to use Filter Option to upload multiple invoice against PO with multiple line item
- The Function of filter button is to hide the unwanted line from screen

Steps for Uploading Multiple/Single Invoice Against Purchase with Multiple Line Item

- Vendor Need to follow below steps for uploading the invoice

Step 1 – Identify and click on rows Require to taken for uploading the invoice line
Step 2- Click on Filter Button (Function of Filter button is to Hide the unwanted line item
Step 3- Fill Detail in line Item and click on Submit Button

The screenshot shows the 'Vendor Invoice' form. It includes fields for Vendor Name, Vendor GSTIN, PO NO, PO Valid To, Company Name, Bill To Location, Invoice Date, Invoice is Digitally signed, Service Period To, Dispatch Docket No, Total Tax Amount, Material_Service Description, Vendor Code, Vendor PAN, MSME Registered, PO Valid From, Delivery Date, Ship to Location, Invoice No, Other Optional Document, Service Period From, Dispatched Through, and Invoice Amount without Tax. Below these fields is a table with columns: PO No, Srt No, Material Code, Material Name, Unit, PO Qty, Allowed Qty, and Tax. Three rows are visible, each with a checkbox in the first column. A blue callout bubble points to the 'Filter' button and the table, stating: 'After Row Selection Click on Filter here'. Another blue callout bubble points to the table, stating: 'Click on rows Required to be taken for vendor invoice'.

Vendor Invoice - Resolution Stage

Resolution Steps - Post Reconsider of Invoice

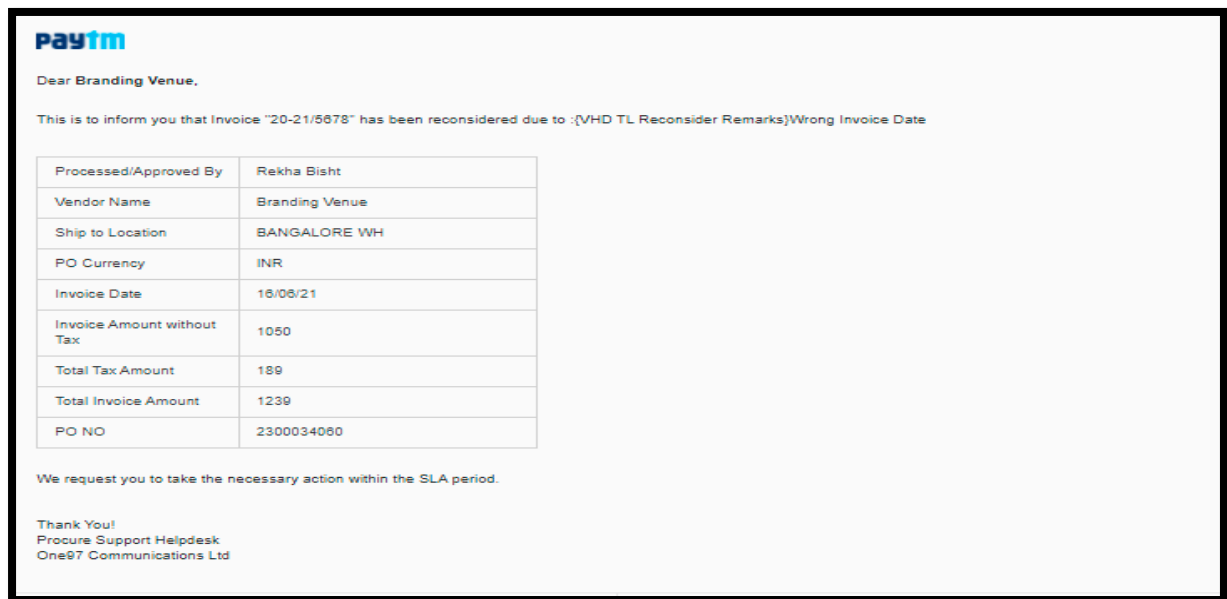
1. Check the Notification Mail of Reconsider Invoice
2. Login into the tool and check “ Need to Act” Bucket
3. Search invoice no . and click on “ View Detail’
4. Click on Edit Button and Modify/fill the details as per the Reason Specified in Reconsider Email
5. Click on Save Button
6. After saving the detail click on Submit Button and mention the remarks

Note:

1. All Grey Colored Cell are Non Editable.

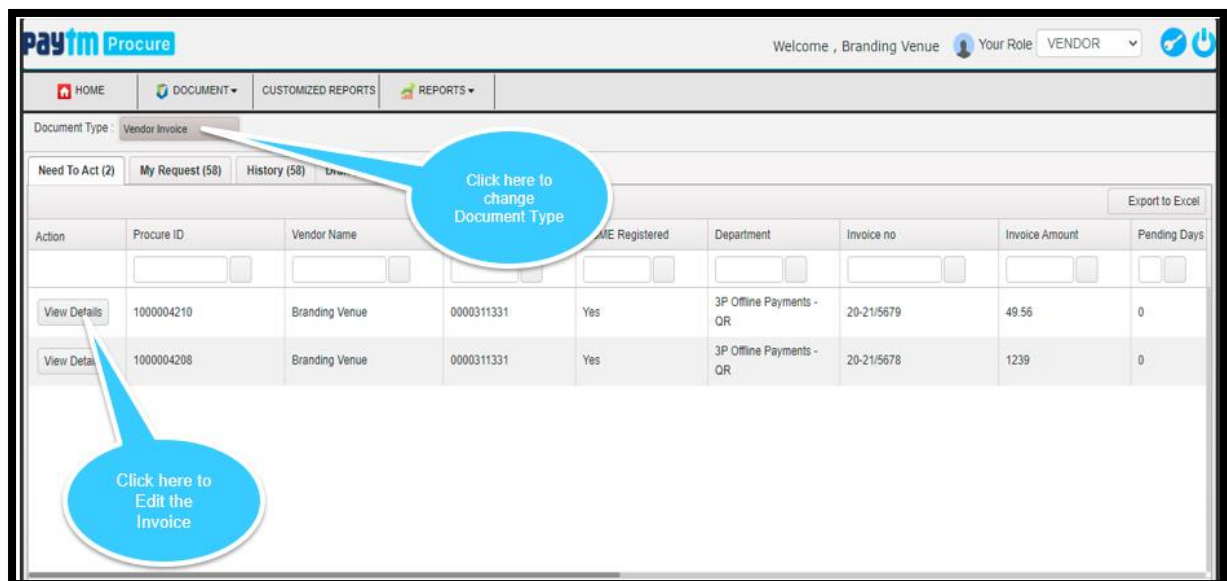
Notification Mail to Vendor - Post Reconsider of Invoice

- Vendor will receive notification mail along with reconsider remarks on registered email id



Vendor Invoice Resolution - Vendor Home Page

- Vendor need to login into the portal and check need to act bucket and then click on view detail for editing the invoice
- After Clicking on view detail doc detail screen will open



Vendor Invoice Resolution - Invoice Doc Detail Screen

- Vendor has three option submit, cancel and edit
- By Clicking on edit button edit screen will open and vendor will able to edit the invoice
- By clicking on submit button invoice will resubmit for processing
- By Clicking on cancel button invoice will terminated

paytm Procure

SUBMIT CANCEL Edit

CURRENT

Vendor Invoice - [System Document ID: 33465] | LoggedIn User : [Branding Venue] | Role : [Vendor]

PO and Invoice Details

Created By	Branding Venue - arpit sharma	myndsol.com	27/06/21 - 09:47:35
Current Status	UPLOADED		BRANDING VENUE-0000311331-27BCFPR3066R1ZT
Vendor Code	000031133		BCFPR3066R
Vendor GSTIN	27BCFPR3066R		2300034060
MSME Registered	Yes		
PO Amount	10500		
PO Valid From			
PO Currency	INR		
Department	3P Offline Payments - QR		
Bill To Location	OC02-OCIL - KARNATAKA-Bangalore		
Invoice No	20-21/5679		
Invoice Attachment	[View Attachment]		
Service Period From			
Service Period To			
Dispatched Through			
Dispatch Remarks			
Total Tax Amount	7.56		
Additional Approval 1			
Date of Physical Receipt of Invoice			
GRN Date			
AP Receipts Attachment			
VHD Validation Attachment			
Hold(Excluding GST)	0		
Dispatch Docket No	27/06/21		
Invoice Amount without Tax	42		
Total Invoice Amount	49.56		
Additional Approval 2			
Additional Approval 3			
GRN No			
AP Attachment			
Advance Paid	0		
Credit Note(Excluding GST)	0		

Vendor Invoice Resolution - Invoice Edit Screen

- By Clicking on edit button edit screen will open and vendor will able to edit the invoice
- Vendor can edit the invoice detail on screen as per reconsider remarks shared on email
- After editing the invoice vendor need to click on save button and then click on submit button for final submission

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SUBMIT CANCEL Edit

CURRENT

Vendor Invoice - [System Document ID: 33465] | LoggedIn User : [Branding Venue] | Role : [Vendor]

PO and Invoice Details

Bill To Location	OC02-OCIL - KARNATAKA-Bangalore	Bill To GSTIN	29AAAC04007A1Z1	Invoice No	20-21/5679
Invoice Date	27/06/21	Invoice Attachment	[Choose File] No file chosen	Other Optional Document	[Choose File] No file chosen
Invoice is Digitally signed	Yes	Invoice is as per PO terms and description only	<input checked="" type="checkbox"/>	Service Period From	27/06/21
Service Period To	27/06/21	Dispatch Date	27/06/21	Dispatch Remarks	42
Dispatch Docket No		Dispatch Remarks		Total Tax Amount	7.56
Total Tax Amount	7.56	Total Invoice Amount	49.56		
Material Service Description					

Inv Item

HSN SAC Code	Tax Code	Tax Type	Tax Rate	Rate	Remarks	HSN SAC Code As per Invoice	Tax type as per Invoice	Tax Rate as per Invoice	Inv Qty	Amount	Tax Amount
919	ZC-IGST I...	IGST	18	21	Merchant store	919	IGST	18	2		7.560

Save

Vendor Invoice Resolution - Invoice submit Screen

- After saving the edit invoice vendor need to click on submit button and fill remarks for resubmitting the invoice

PO and Invoice Details			
Created By	Branding Venue - arpit.sharma@myndsoft.com	Creation Date	16/06/21 - 22:40:53
Current Status	UPLOADED	Vendor Name	BRANDING VENUE-0000311331-27BCFPR3066R1ZT
Vendor Code	0000311331	Vendor PAN	BCFPR3066R
Vendor GSTIN	27BCFPR3066R1ZT	Vendor GSTIN Status	
MSME Registered	Yes	PO NO	2300066214
PO Amount W/O Tax	10755	PO Valid From	
PO Valid To		Service Period To	
Company Name		Dispatched Through	
Ship to Location		Dispatch Remarks	
Bill To GSTIN		Total Tax Amount	3.64
Invoice Date		Additional Approval 1	
Other Optional Document		Date of Physical Receipt of Invoice	
Misc. Supporting		GRN Date	
Dispatch Date	29/06/21	AP Reviewer Attachment	
Dispatch Docket No		VHD Validation Attachment	
Invoice Amount without Tax	20.25	Hold(Excluding GST)	0
Total Invoice Amount	23.89		
Additional Approval 2			
Additional Approval 3			
GRN No			
AP Attachment			
Advance Paid	0		
Credit Note(Excluding GST)	0		

Vendor Invoice Resolution - Invoice Reject Screen

- vendor can cancel the invoice permanently as per requirement, vendor need to click on cancel button and mention the remarks of rejection

PO and Invoice Details			
Created By	Branding Venue - arpit.sharma@myndsoft.com	Creation Date	29/06/21 - 20:56:37
Current Status	UPLOADED	Vendor Name	BRANDING VENUE-0000311331-27BCFPR3066R1ZT
Vendor Code	0000311331	Vendor PAN	BCFPR3066R
Vendor GSTIN	27BCFPR3066R1ZT	Vendor GSTIN Status	
MSME Registered	Yes	PO NO	2300066214
PO Amount W/O Tax	10755	PO Valid From	
PO Valid To		Service Period To	
Company Name		Dispatched Through	
Ship to Location		Dispatch Remarks	
Bill To GSTIN		Total Tax Amount	3.64
Invoice Date		Additional Approval 1	
Other Optional Document		Date of Physical Receipt of Invoice	
Misc. Supporting		GRN Date	
Dispatch Date	29/06/21	AP Reviewer Attachment	
Dispatch Docket No		VHD Validation Attachment	
Invoice Amount without Tax	20.25	Hold(Excluding GST)	0
Total Invoice Amount	23.89		
Additional Approval 2			
Additional Approval 3			
GRN No			
AP Attachment			
Advance Paid	0		
Credit Note(Excluding GST)	0		

How to Search And Download Purchase Order And Invoice Reports In Paytm Procure Tool
Step to Search Document Through Search Report

- Click on Search Report under Reports menu on home screen
- Report page will open after clicking on Search Report
- Document Type: Select document as vendor invoice
- Action: Select the search criteria as Creation Date, Invoice number or any other
- Fill the search text or input as date range in case of creation date
- View Details: Click on DOC ID to view doc detail page(Ref next slide)
- Click on search or Download in Excel to view the report

- Search Reports – User Home Page
- Vendor Need to select Search report under reports menu

Search Report – Report Screen

- Vendor need to select require document in document type, criteria and put the criteria value in blank column and then click on search button
- After clicking on search detail will reflect vendor need to click on line item to check the detail and can also download the same in excel by clicking export to excel

The screenshot shows the 'Document Search Report' page. At the top, there's a navigation bar with 'HOME', 'DOCUMENT', 'CUSTOMIZED REPORTS', and 'REPORTS'. The user is logged in as 'Branding Venue' with the role 'VENDOR'. The main section has filters for 'Document Type' (set to 'Purchase Order') and 'Action' (set to 'SAP PO No' with value '2300034060'). There are buttons for 'Click to download in excel' and 'Export to Excel'. A table below shows search results with columns: PO Ref No, PO Created By, PO Date, Vendor Code, Vendor Name, Vendor GSTIN, Vendor State, and Invoice Requi. One result is visible with PO Ref No '3345123' and Vendor Name 'Branding Venue'. Callouts point to various elements: 'Click here to select the document' points to the 'Document Type' dropdown; 'Click here to view the report' points to the 'REPORTS' tab; 'Click here to select the search criteria' points to the 'Action' dropdown; 'Click here to download the report in excel' points to the 'Export to Excel' button; and 'Click here to view doc detail page' points to the first row of the table.

How to Reset the Password

The guide is titled 'Facing challenges in password generation?' and 'Follow Below Four Step'. It consists of four steps:

- Step -1:** Screenshot of the 'Login Here' page. Callouts include 'Click on Forgot Password' pointing to the 'Forgot Password?' link and 'Do not press this link twice' pointing to the same link.
- Step -2:** Screenshot of the password reset form. Callouts include 'Enter your user id here and click on submit' pointing to the 'UserID' field and 'Submit' button.
- Step -3:** Screenshot of an email template. Callouts include 'Click Here' pointing to a link in the email body and 'Do not press this link twice' pointing to the same link.
- Step -4:** Screenshot of the 'Password Reset' page. Callout includes 'Enter password here and submit' pointing to the password field and 'Submit' button.

Guidance for user login

1. Click on Forgot password at login screen (Refer Step-1)
2. Mention your user ID and press submit (Refer Step- 2), this will generate link to reset password over email (Refer step 3).
4. Don't press twice on the login link (Refer step 3)
5. Link will redirect you to password resetting page, enter your new password to generate new password (Refer Step 4)

GO **BIG** OR
GO Home

Thank You!

