USER GUIDE

Partnerportal™
Grow with us

PARTNER PORTAL OVERVIEW

The Partner Program is designed to enable partners to effectively market and sell our advanced payment APIs. By joining our program, partners gain access to a suite of tools and support that facilitate the integration of these APIs into various business operations. Our APIs are crafted to enhance the financial services ecosystem, providing seamless payment solutions that drive business efficiency and growth.

Visit the Partner Portal website.

Register on the Portal

Await admin approval following verification.

Log in to the portal.

Enter your bank details.

Enter your bank details.

BENEFITS

Earn commissions on API sales through our program.

Offer APIs that integrate effortlessly into various business systems.

Add high-demand financial services to your product lineup.

Receive expert assistance to maximize your sales and support efforts.

VALUE PROPOSITION

1. **Boost Revenue Potential** - Earn attractive commissions by selling high-demand payment APIs to a growing market.
2. **Seamless Integration** – Provide clients with APIs that effortlessly integrate into their existing business systems, enhancing operational efficiency.
3. **Comprehensive Support** - Benefit from dedicated technical and sales support to ensure successful API implementation and client satisfaction.
4. **Expand Offerings** - Enrich your product portfolio with advanced financial services solutions, catering to diverse business needs.
5. **Drive Innovation** – Empower your clients with cutting-edge technology that supports and accelerates their financial operations and business growth.

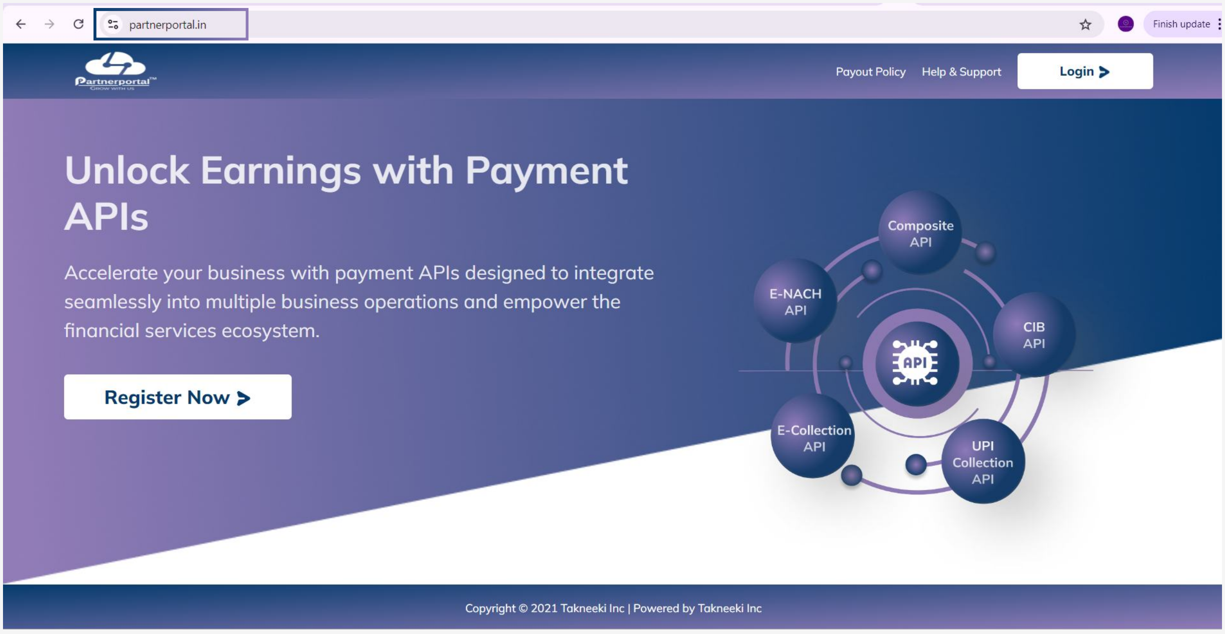
PRE-REQUISITES

- **Business Registration:** Ensure your company is officially registered and has a GST number.
- **Technical Capabilities:** Have a technical proficiency in API integration and financial services.
- **Compliance:** Meet regulatory and compliance standards relevant to financial transactions.
- **Partner Portal Access:** Register and gain access to the Partner Portal for program management.
- **Banking Details:** Provide valid banking information for transaction and commission processing.

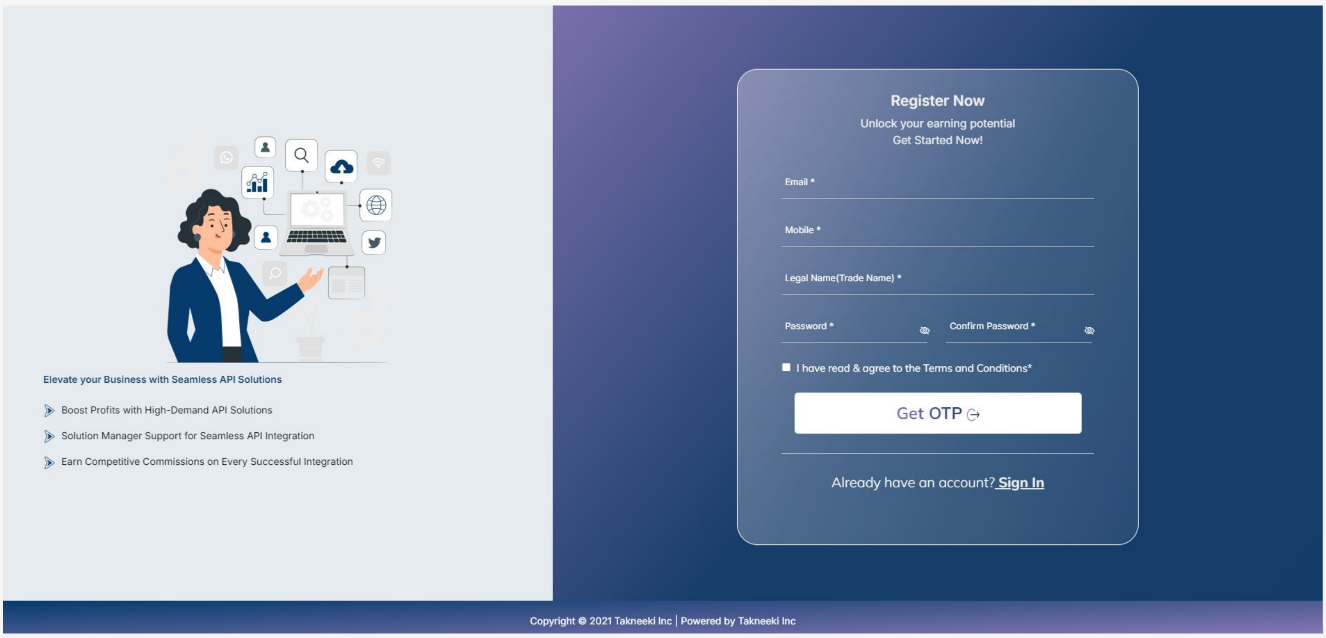
By joining our Partner Program, you will gain access to powerful payment APIs that can be integrated into your clients' systems. This program is tailored for businesses that want to offer advanced financial solutions and accelerate their growth while earning commissions.

Registration Process

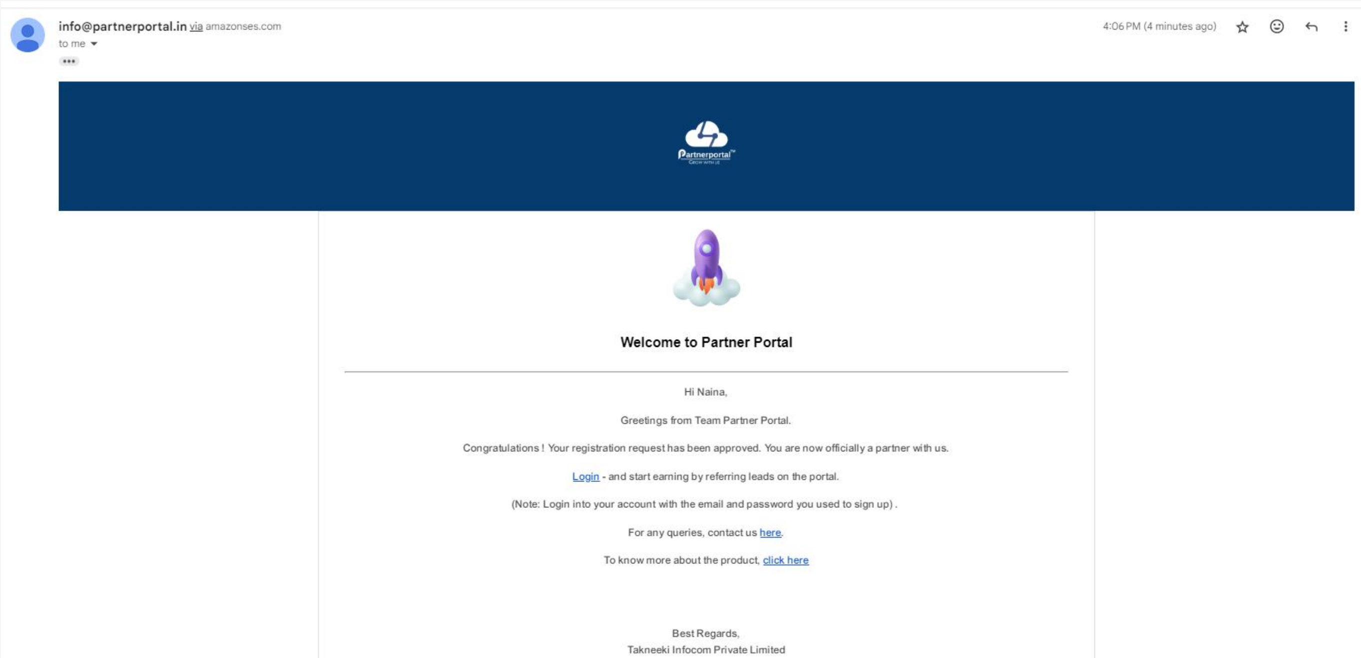
1. Access the Partner Portal - Visit our Partner Portal at www.partnerportal.com. This is your gateway to the registration process.



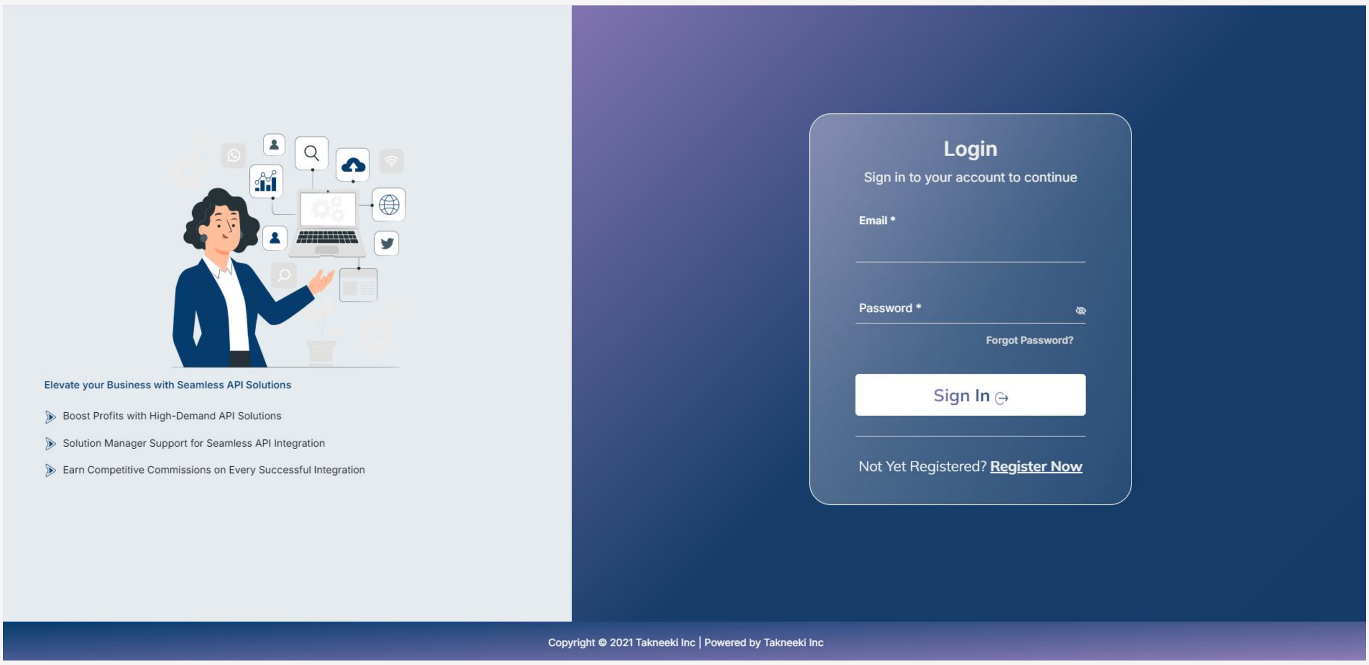
2. Complete the Registration Form - Fill out the online registration form with your business details, including company name, contact information. Ensure all fields are accurately completed to facilitate a smooth approval process.



3. Verification and Approval - Our team will review your application. This process ensures that all information is correct and that your experience meets our criteria. You will receive an email notification once your registration has been approved.

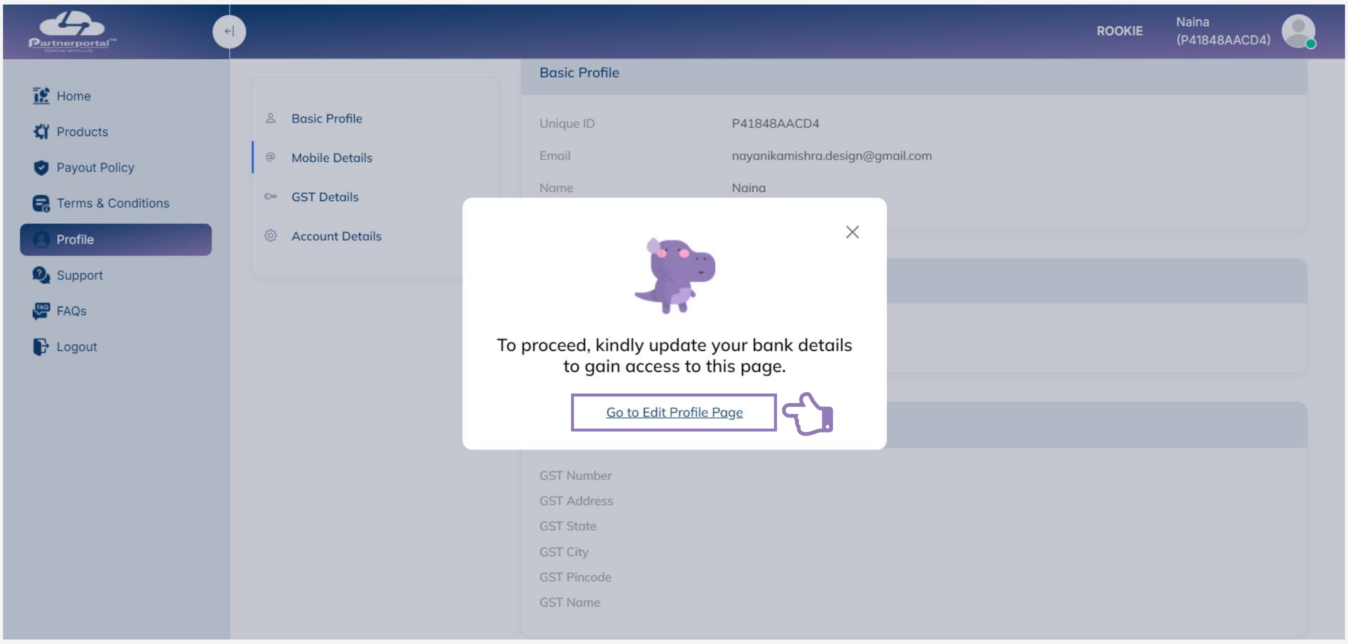


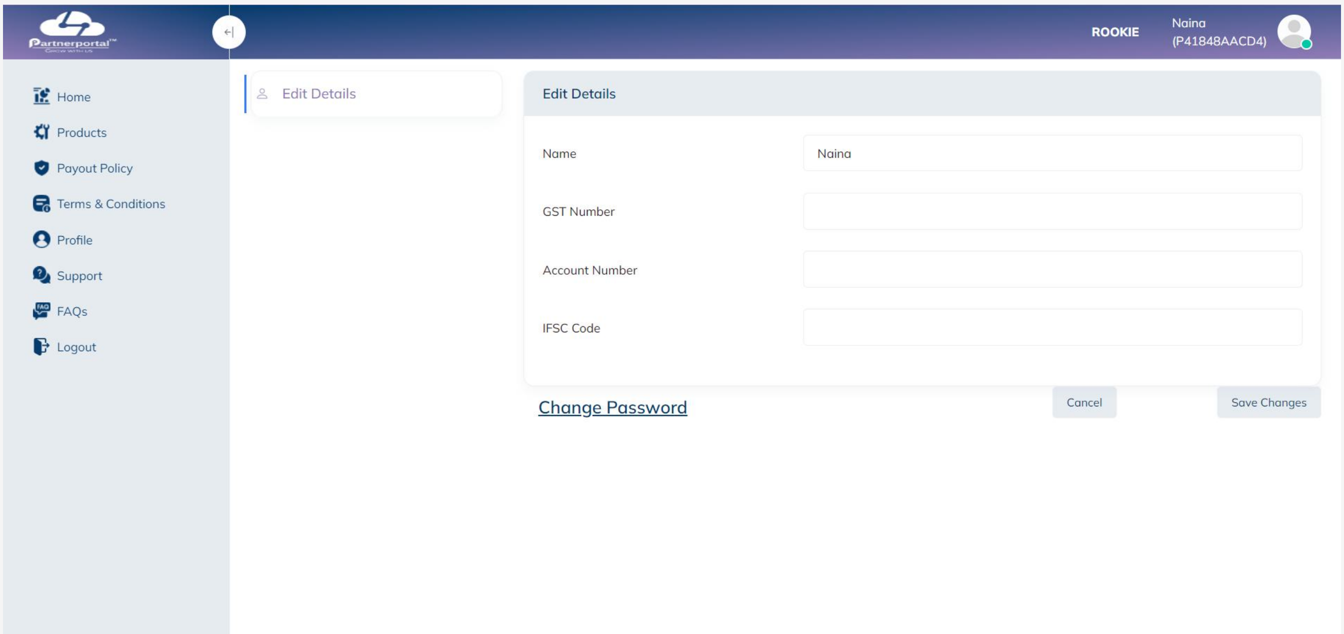
4. Login to Partner Portal - After approval, log in to the Partner Portal using your credentials.



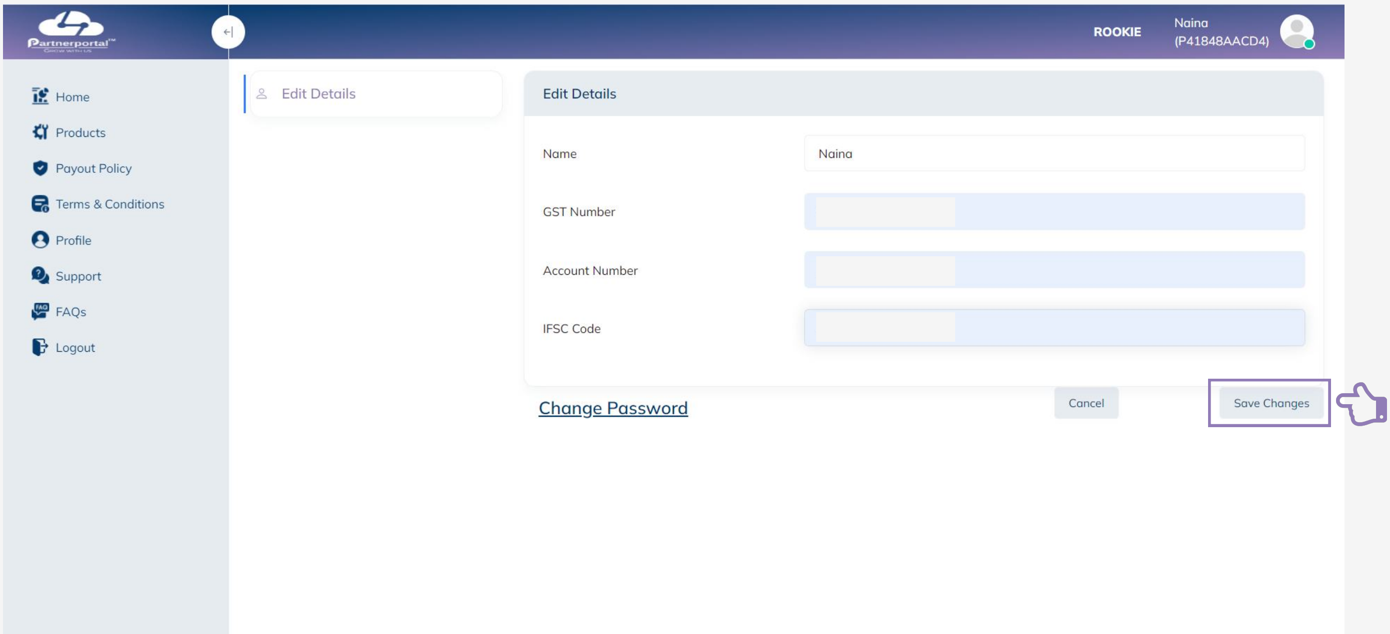
Upon successful login following your registration approval, you will be directed to the Profile page. Here, you need to complete the following steps:

1. Add Mandatory Details: - Enter essential information including your GST Number, Account Number, and IFSC Code.

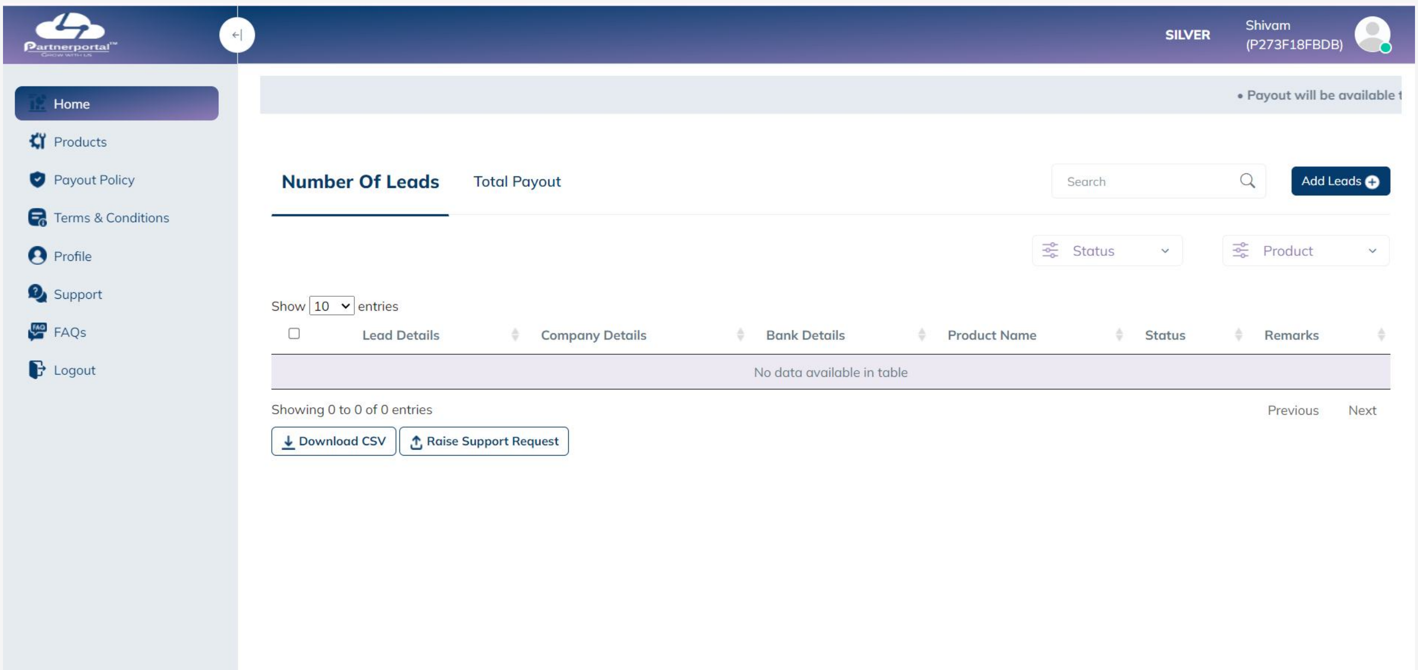




2. Save Your Information: - Click the save button after entering your GST and bank details. This step finalizes your profile setup



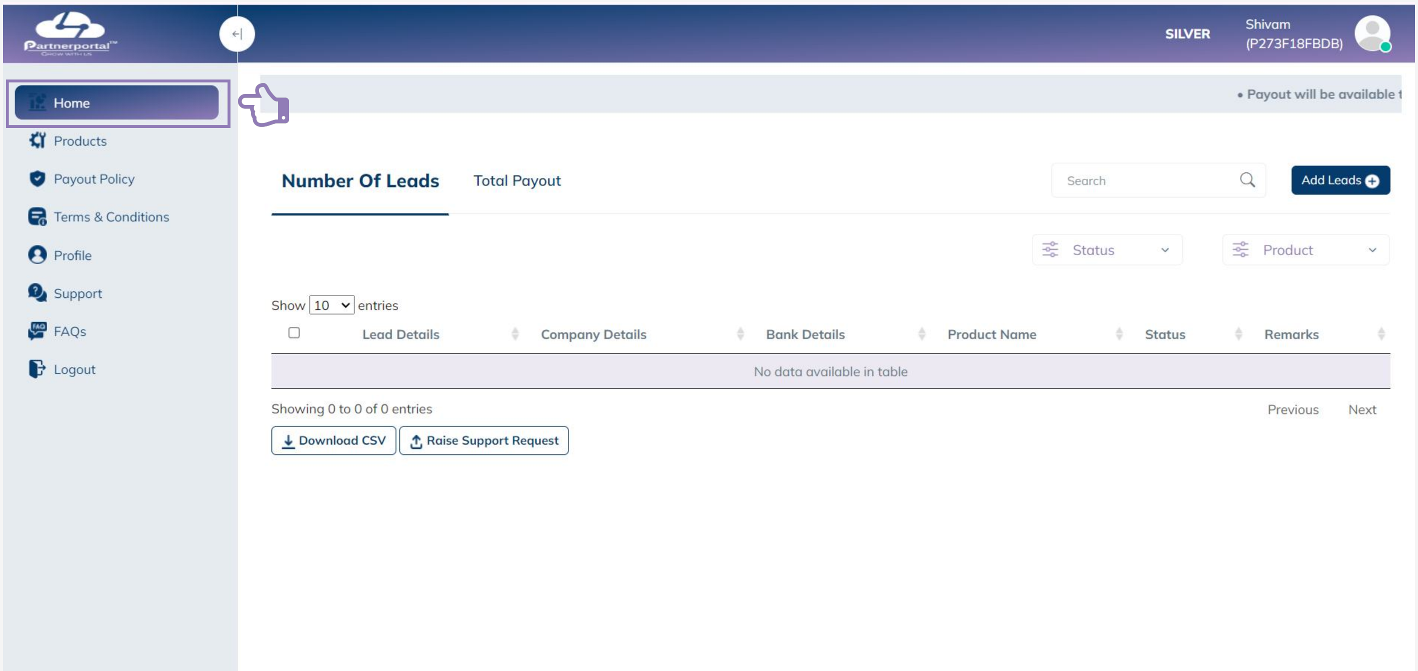
3. Access the Dashboard - : Once your details are saved, you will gain access to the dashboard within the Partner Portal. From the dashboard, you can start adding new leads and managing existing ones, utilizing the tools and features available to optimize your performance.



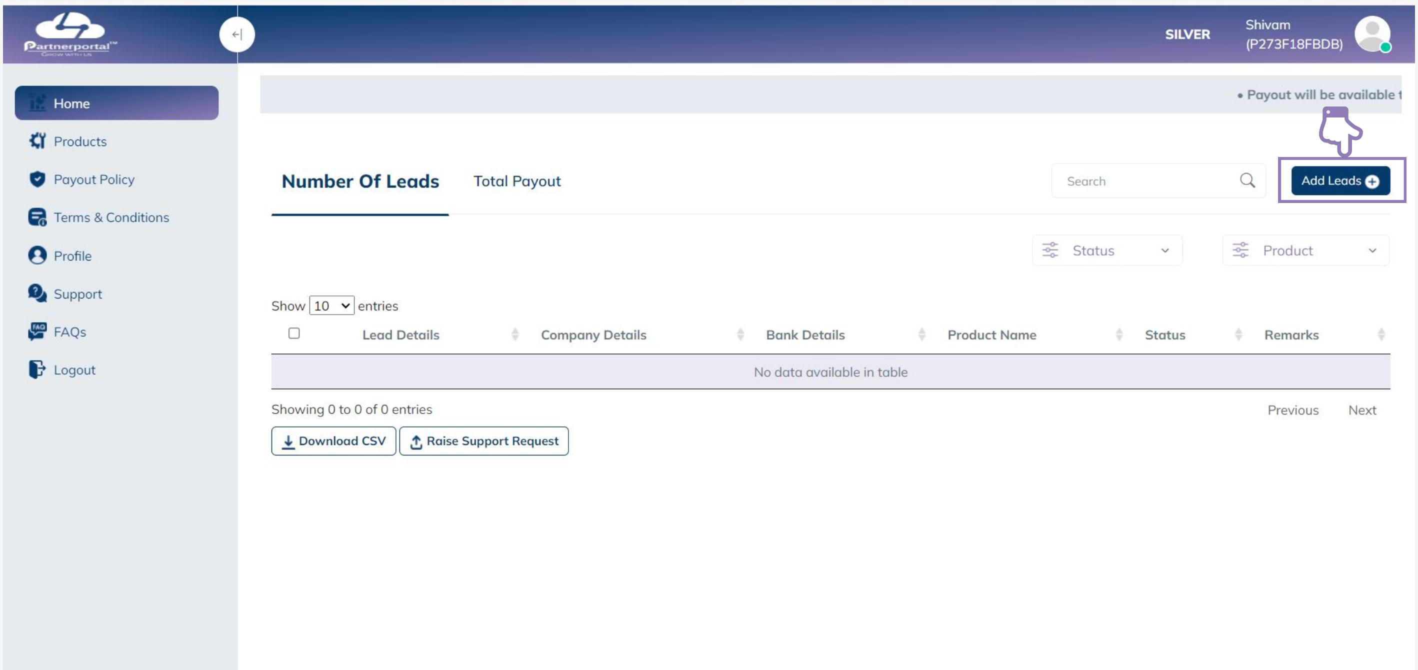
ADD NEW LEADS

After completing your profile update, you can immediately start adding new leads. Here's how:

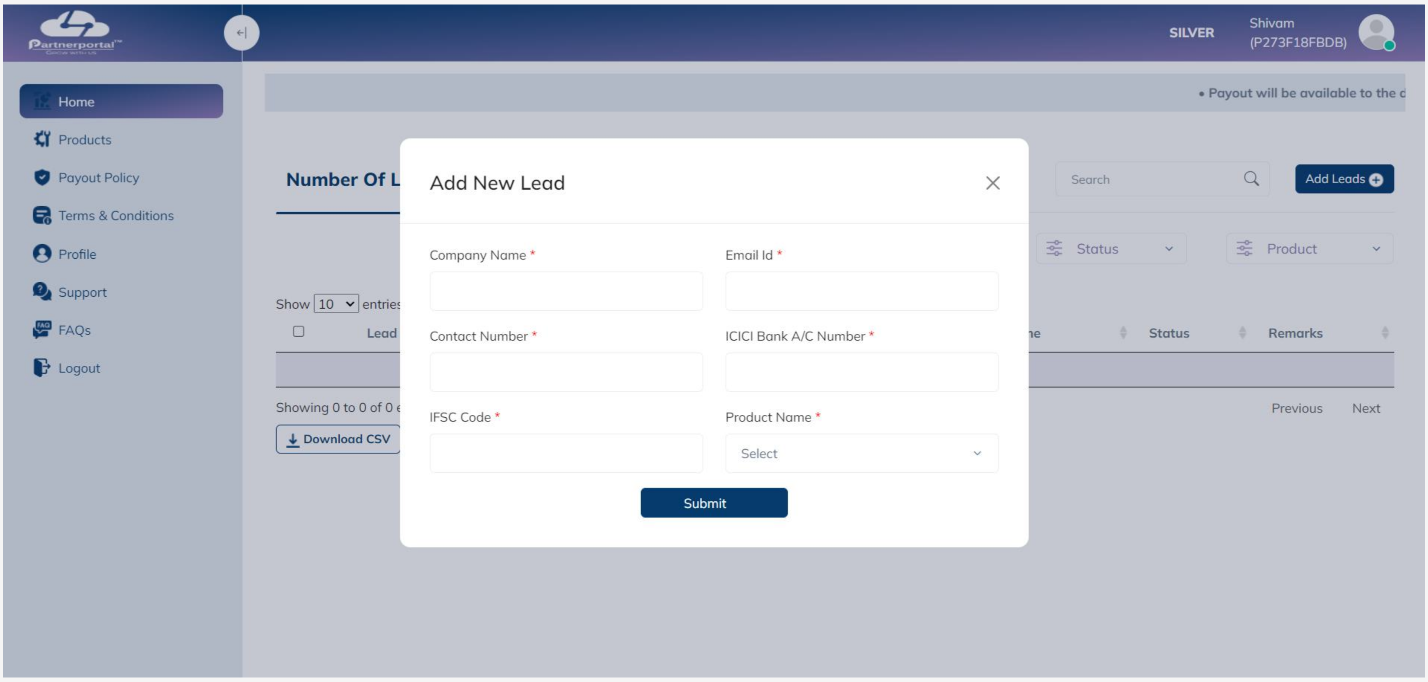
1. **Navigate to the Dashboard -** Once your profile is updated, head over to the dashboard.



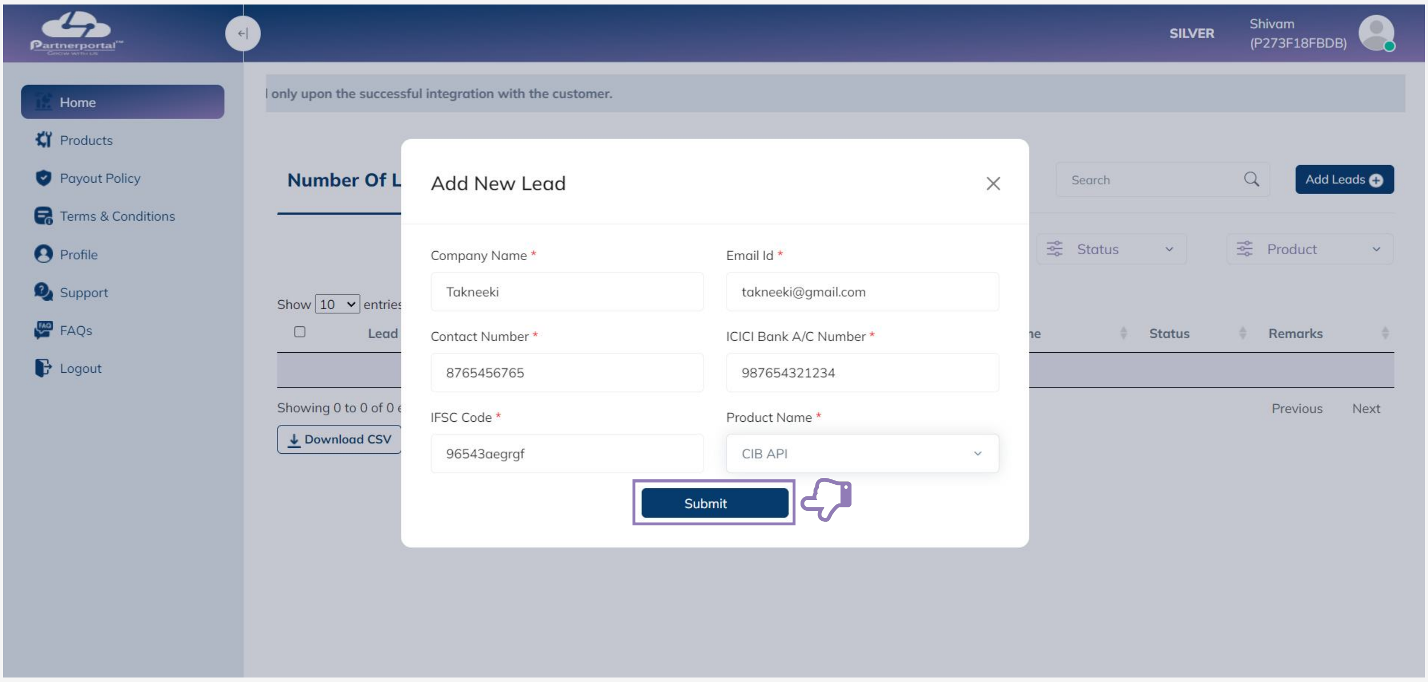
2. **Click on "Add Leads" -** Find and click the "Add Leads" button on the dashboard.



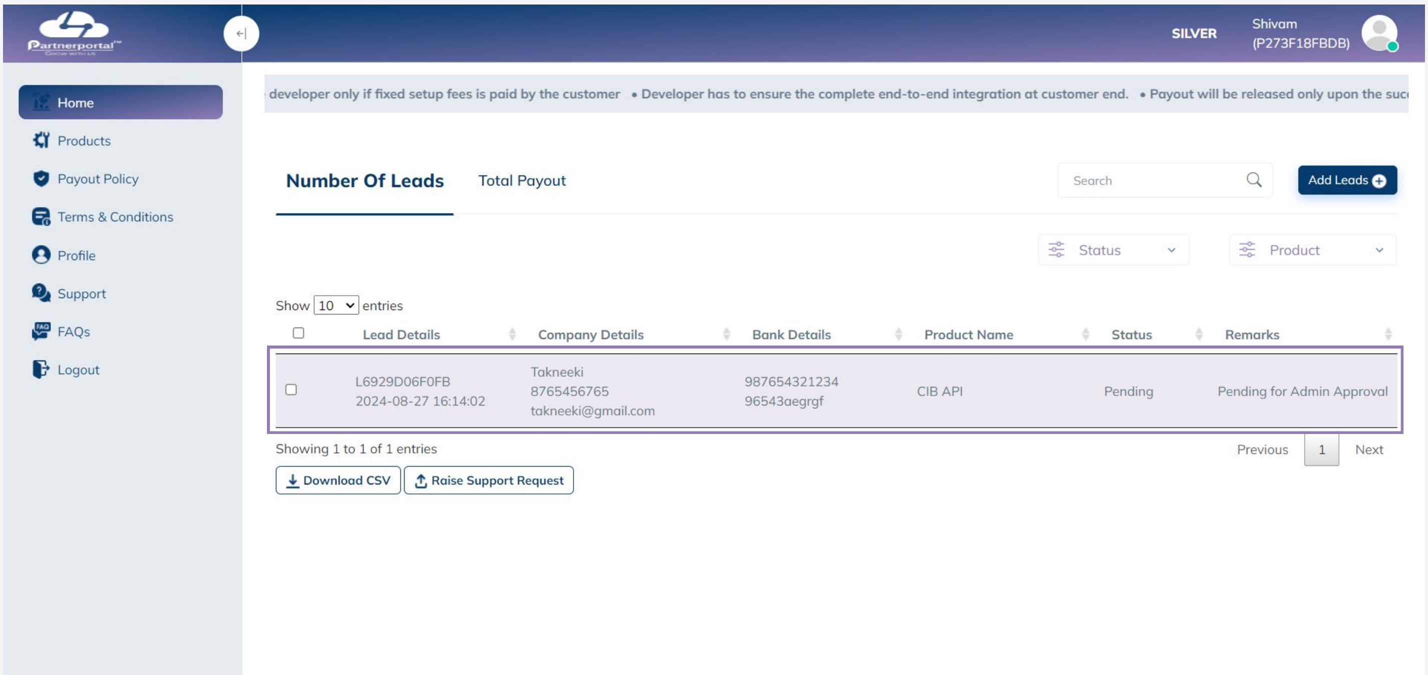
3. Enter Lead Details - A form will appear prompting you to input the lead's basic information



4. Submit the Lead - After filling in all required details, click the "Submit" button to add the lead.



5. Lead Reflection - Once submitted, the lead will automatically appear on your dashboard, where you can manage and track its progress.

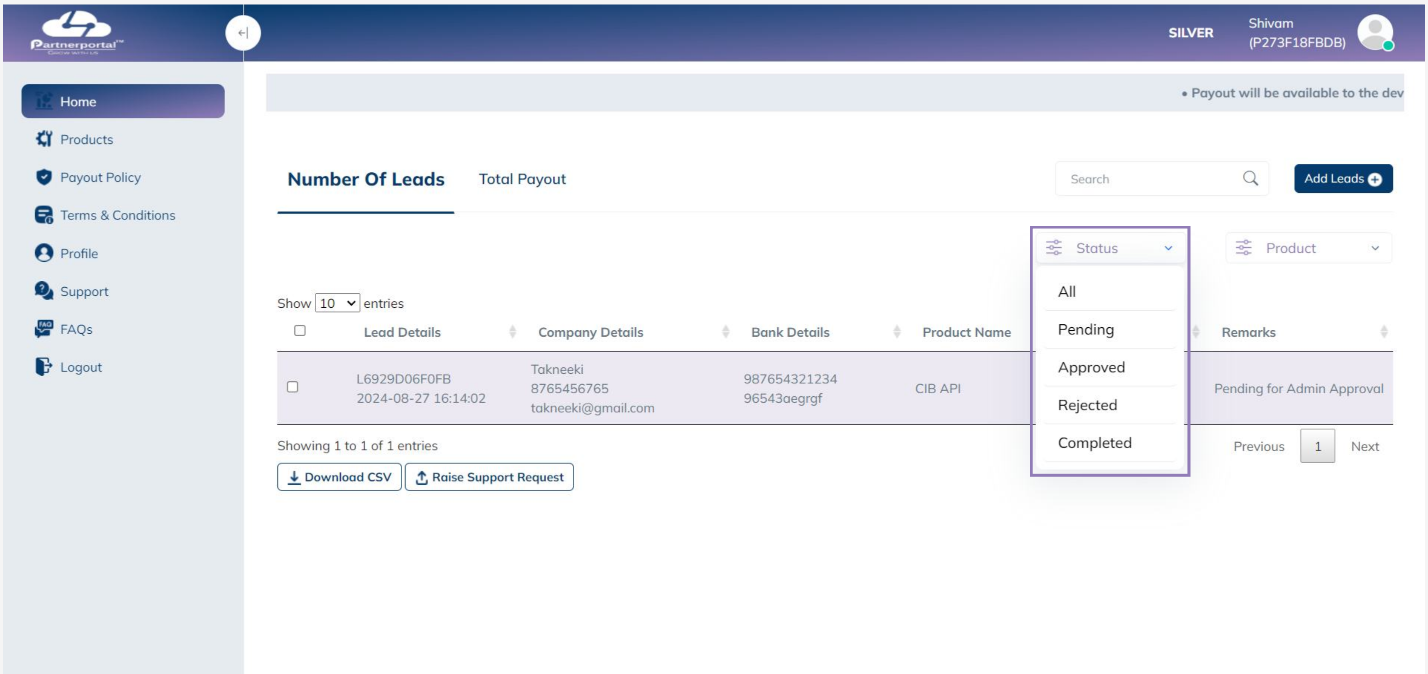


This streamlined process ensures that you can quickly and efficiently expand your network of leads, contributing to your success within the Partner Program.

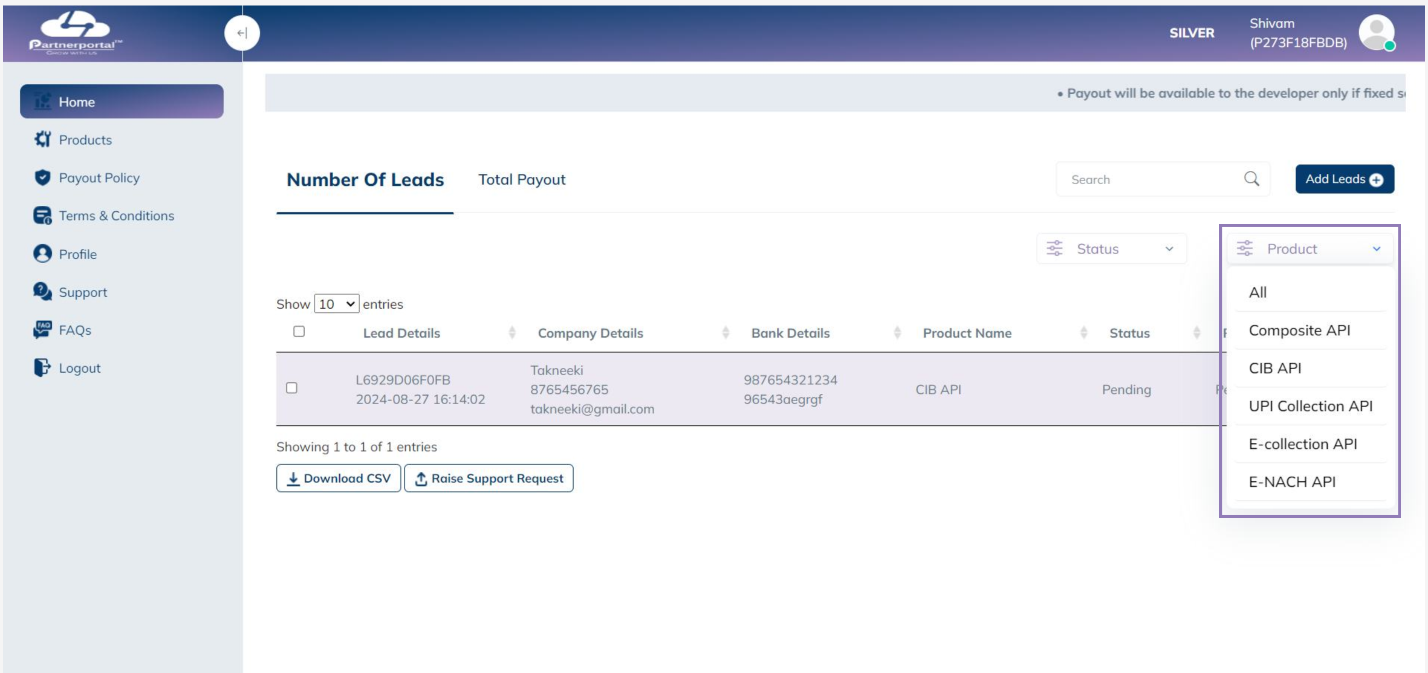
Once you add a new lead, it will automatically appear on your dashboard. The dashboard is designed to help you efficiently manage and track your leads with the following features:

Sorting and Filtering

1. Status Filter - Easily sort leads based on their current status to focus on those that need immediate attention.

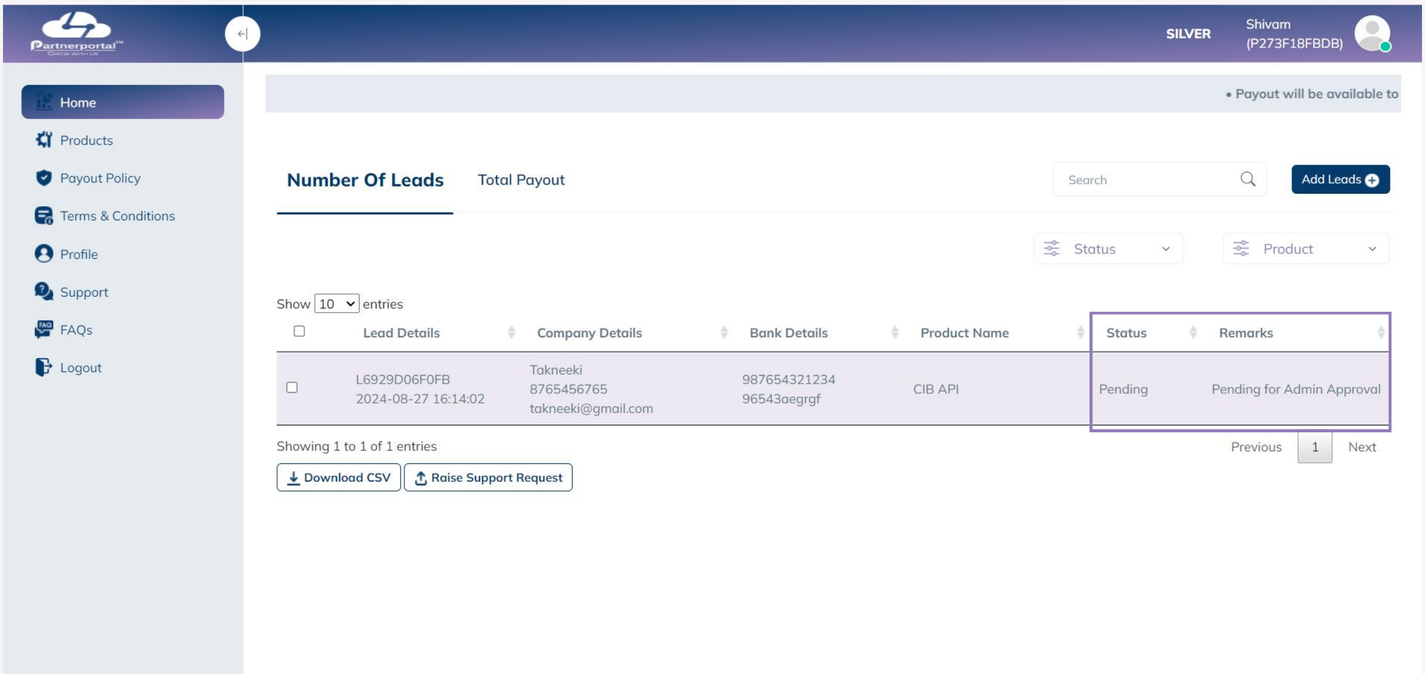


2. Product Filter - Filter leads by product to manage different categories separately.



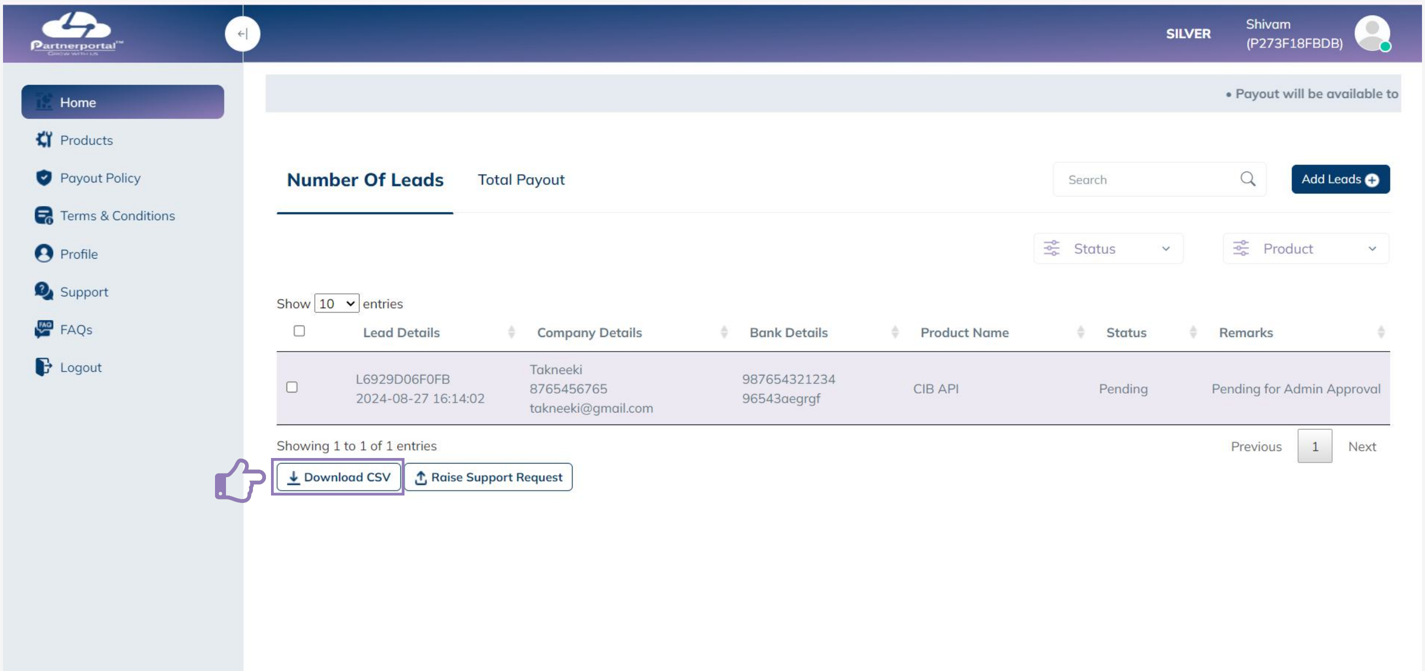
Progress Tracking

Status & Remark Section - Monitor the progress of each lead by checking the Status and Remark columns within the lead table.



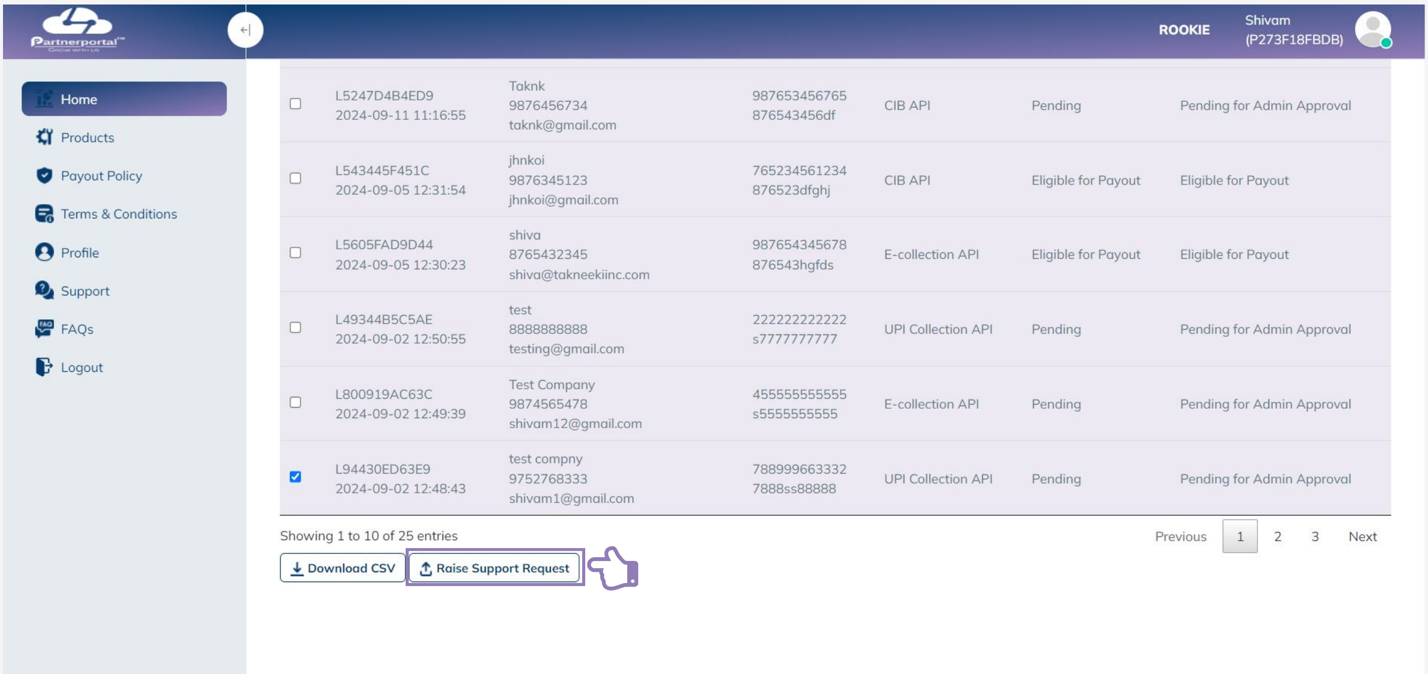
Data Export

Download Leads - Export all added leads, along with their details, in CSV format directly from the dashboard for offline analysis and record-keeping.

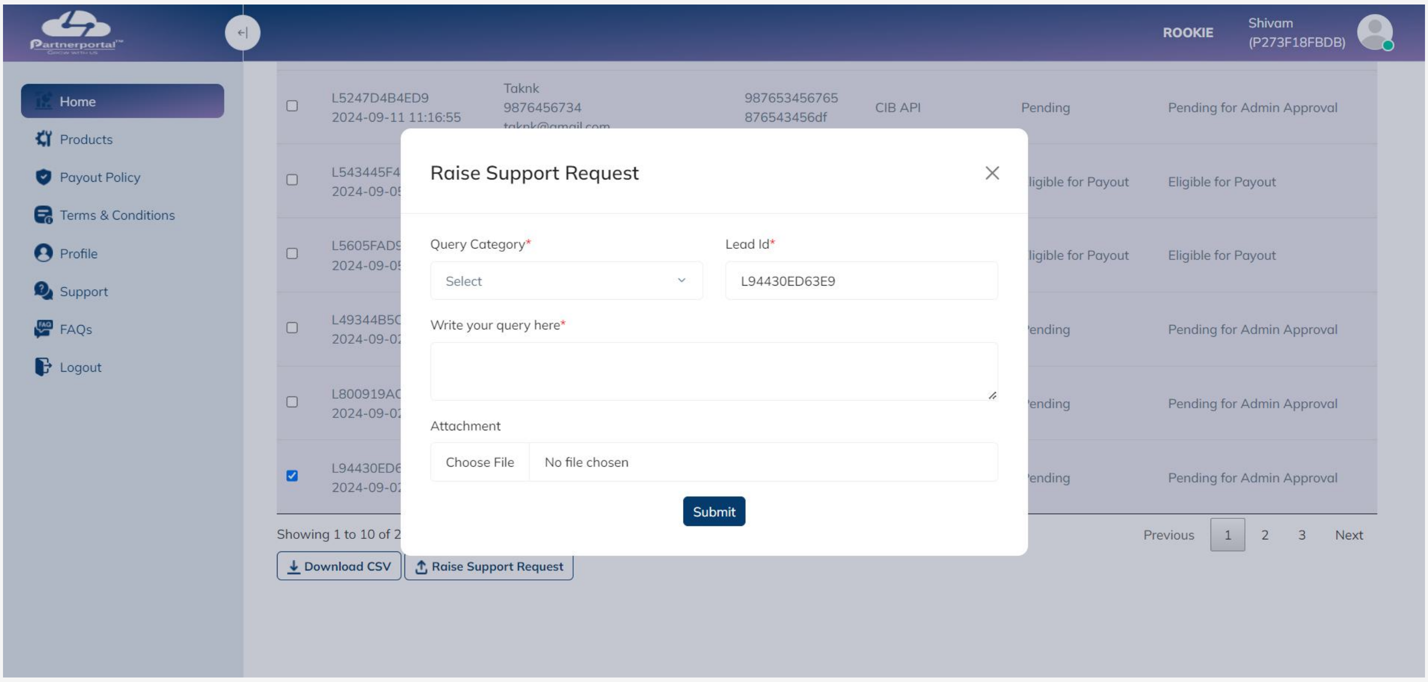


Support Requests

Raise Support Request - If you need assistance, you can raise a support request directly from the dashboard by selecting the lead and then click on the "Raise Support Request" button.

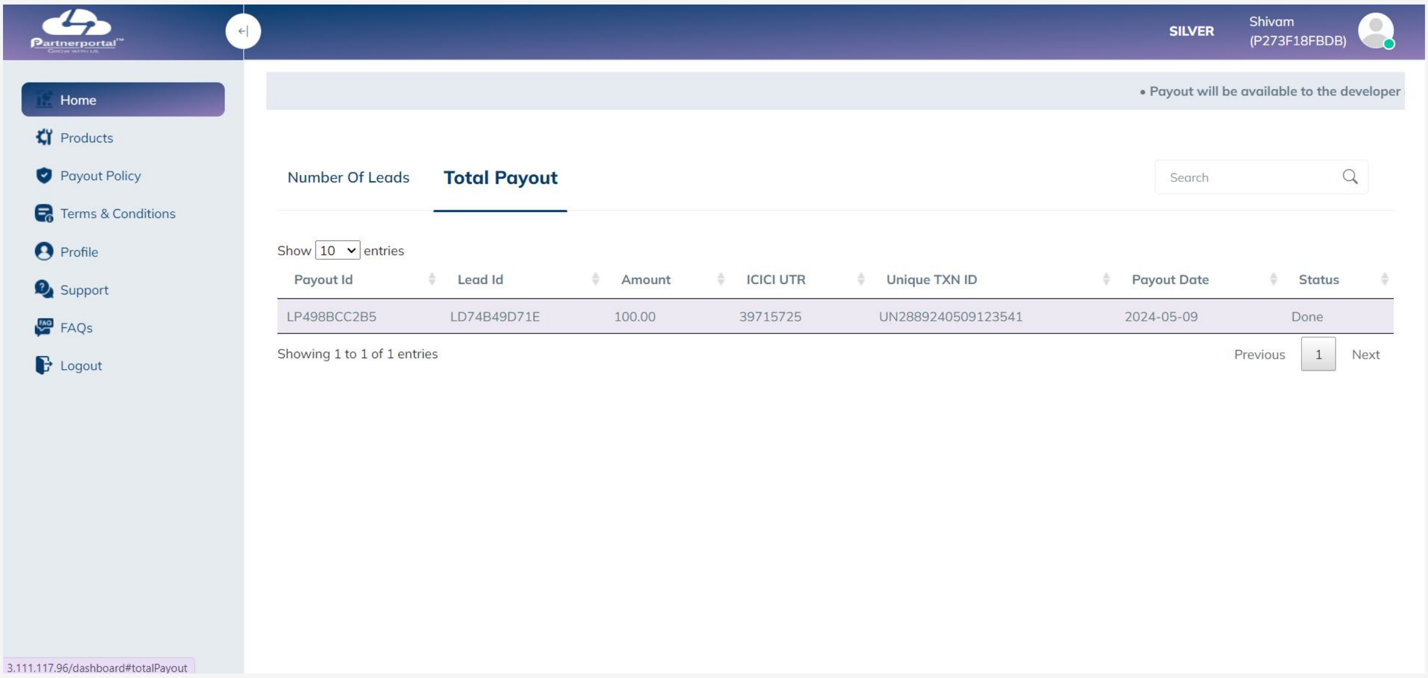


Once you click on the "Raise Support Request" button, a modal window will appear, prompting you to provide basic information about your query. The lead ID you previously selected will automatically be pre-filled in the relevant field.



Payout Details

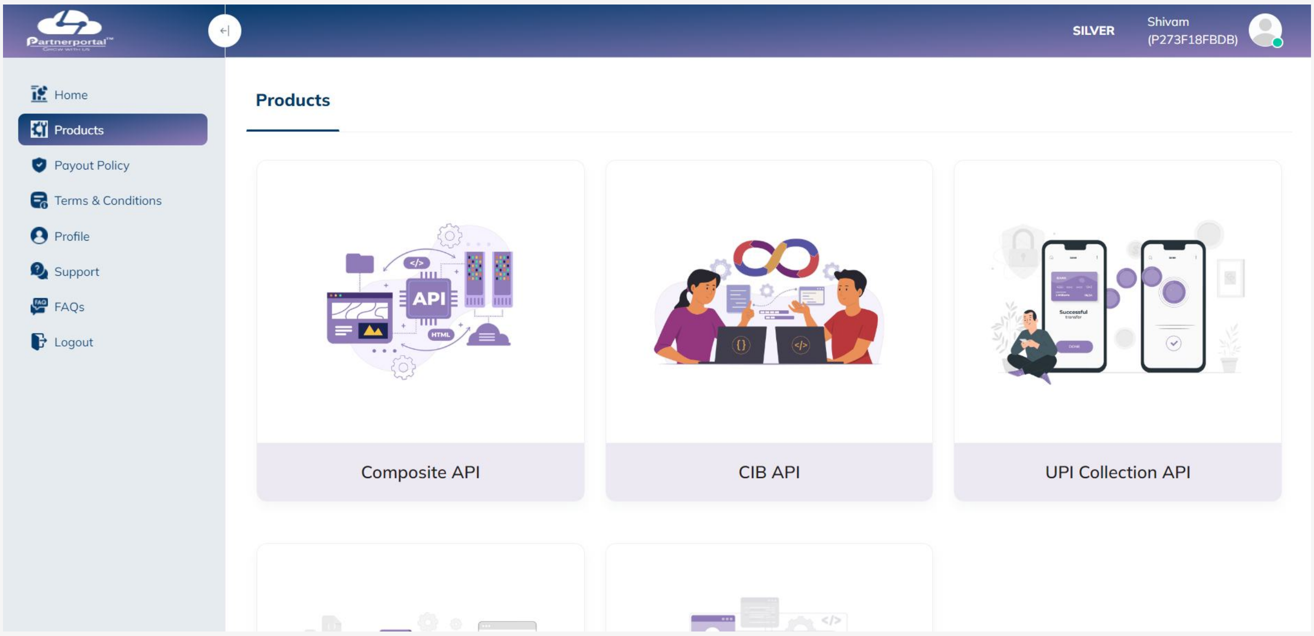
Payout History - View all leads for which you have previously been paid in the "Payout Details" section. This includes the Unique Transaction ID and other transaction details for your reference.



When you navigate to the Products section from the menu bar, you will find a comprehensive list of the products available for you to sell. Here's what you can expect:

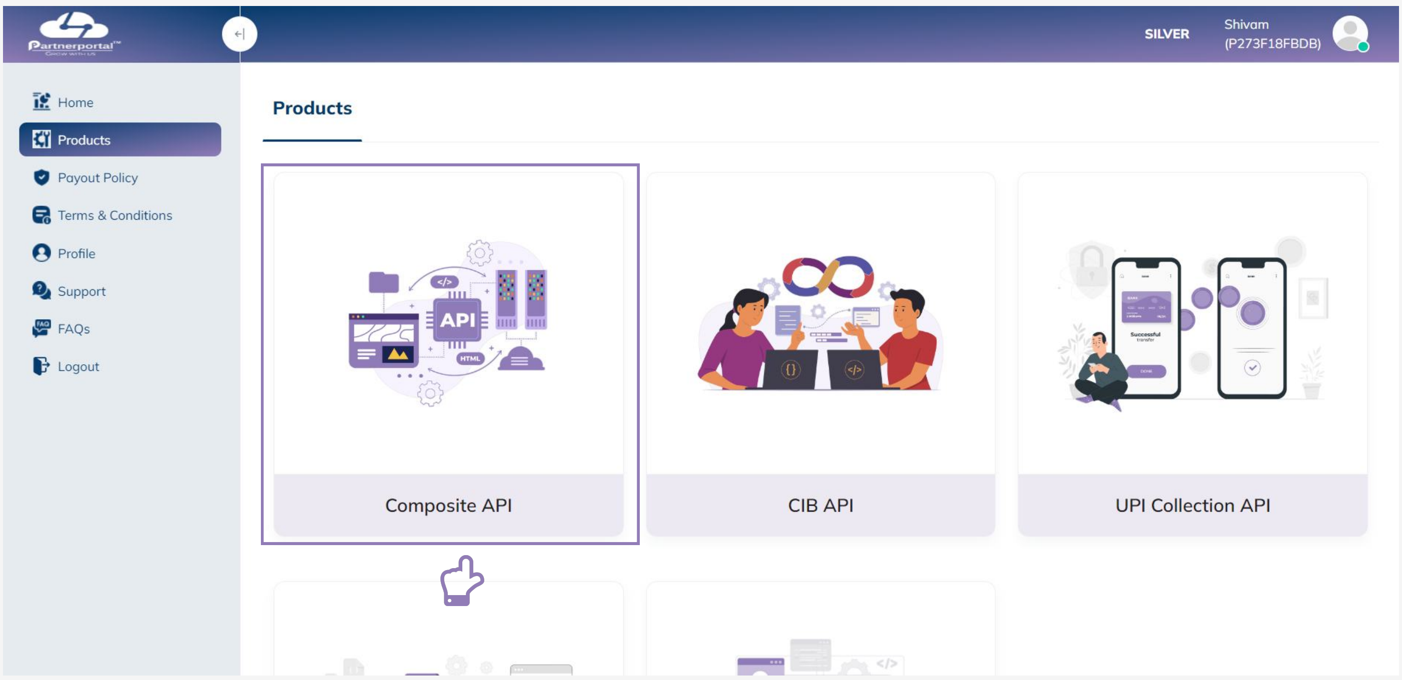
Product Listing

1. View All Products - Upon entering the Products section, you'll see a list of all the products that you can offer to your clients.

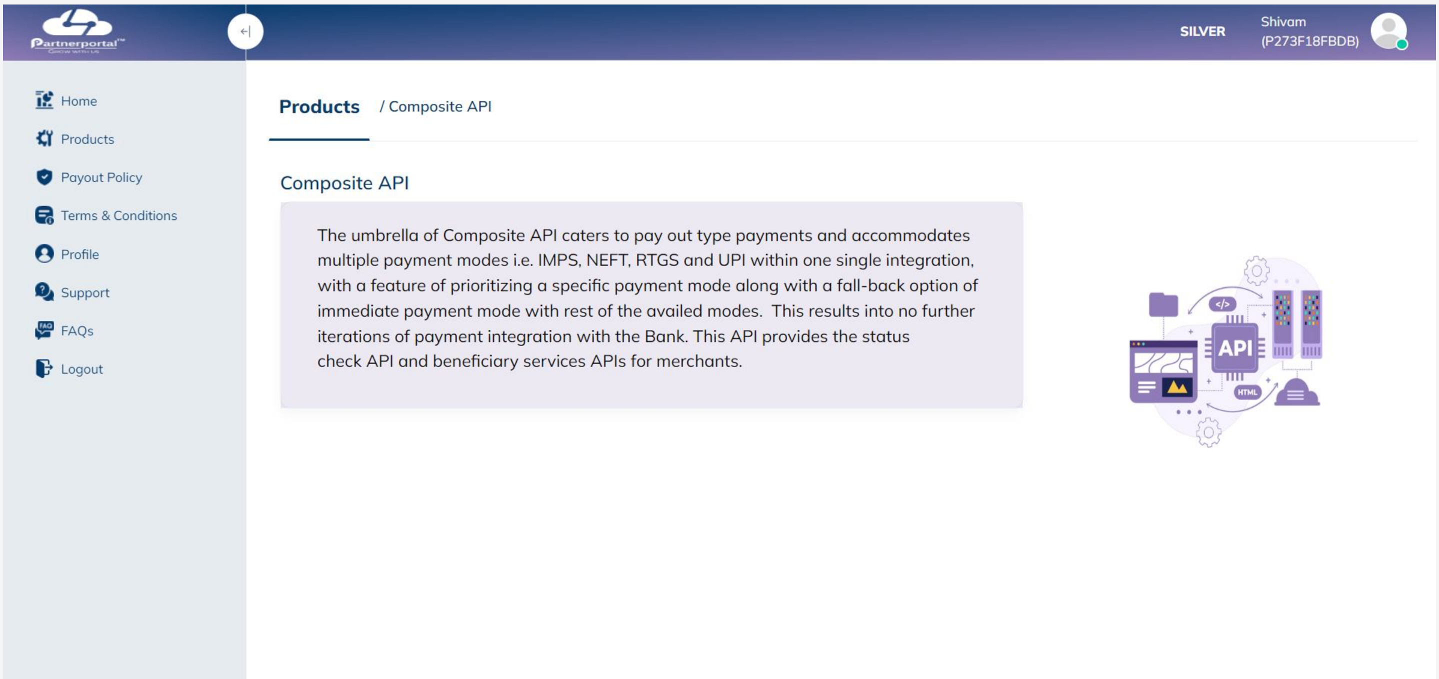


Detailed Product Information

1. Select a Product - Upon entering the Products section, you'll see a list of all the products that you can offer to your clients.



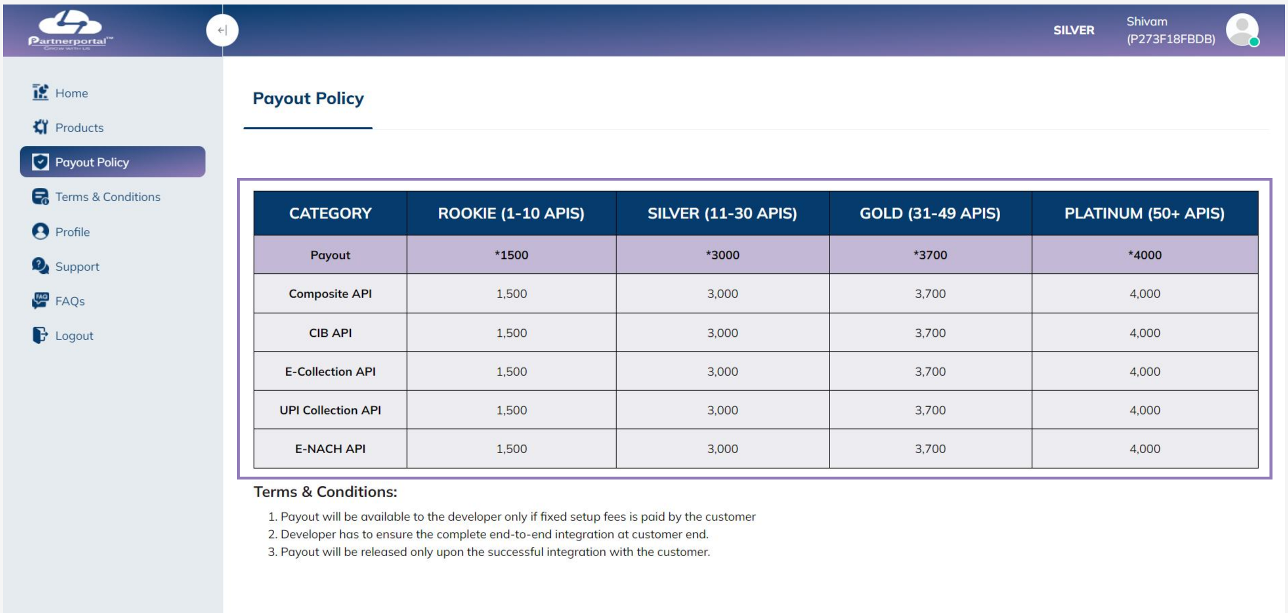
Product Details - Each product page provides product flow, including key features, benefits that can help you understand the product effectively.



When you click on the Payout Policy option in the menu bar, you will gain access to comprehensive details regarding the payout policy and its associated terms and conditions. Here's what you'll find:

Payout Structure

Detailed Breakdown - Upon entering the Products section, you'll see a list of all the products that you can offer to your clients.



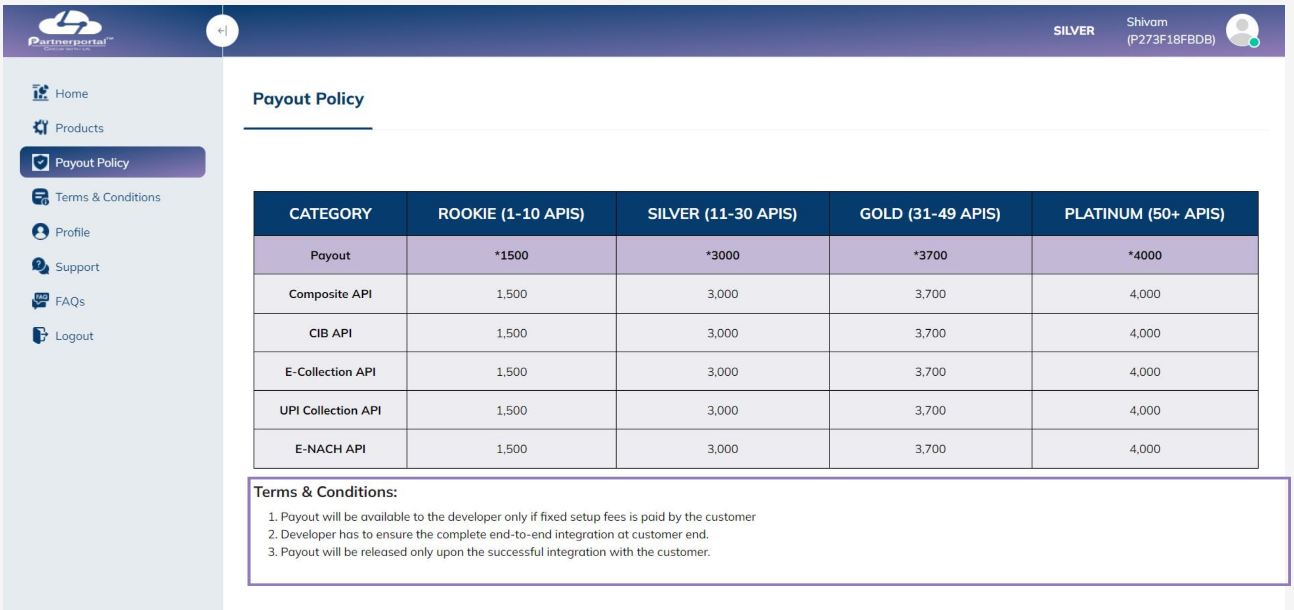
CATEGORY	ROOKIE (1-10 APIS)	SILVER (11-30 APIS)	GOLD (31-49 APIS)	PLATINUM (50+ APIS)
Payout	*1500	*3000	*3700	*4000
Composite API	1,500	3,000	3,700	4,000
CIB API	1,500	3,000	3,700	4,000
E-Collection API	1,500	3,000	3,700	4,000
UPI Collection API	1,500	3,000	3,700	4,000
E-NACH API	1,500	3,000	3,700	4,000

Terms & Conditions:

1. Payout will be available to the developer only if fixed setup fees is paid by the customer
2. Developer has to ensure the complete end-to-end integration at customer end.
3. Payout will be released only upon the successful integration with the customer.

Terms & Conditions

Important Guidelines - Review the terms and conditions that govern the payout process, including eligibility criteria, timelines, and any specific requirements you must meet to receive payouts.



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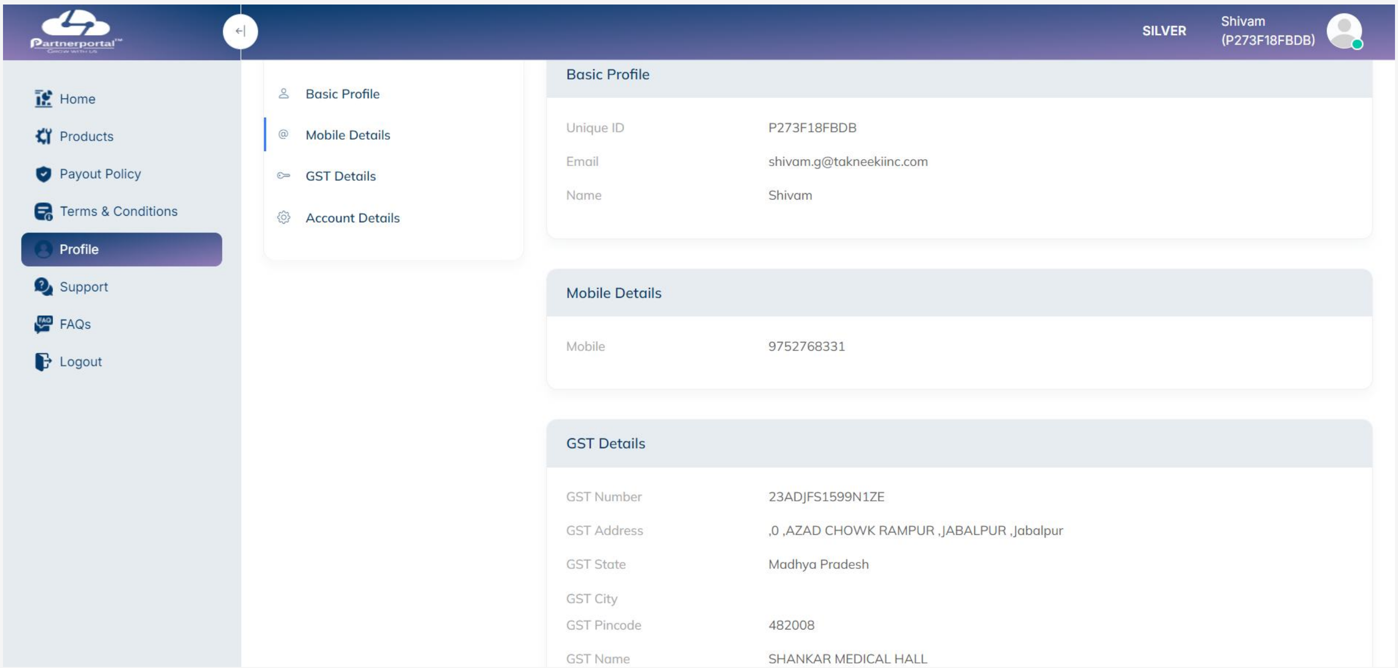
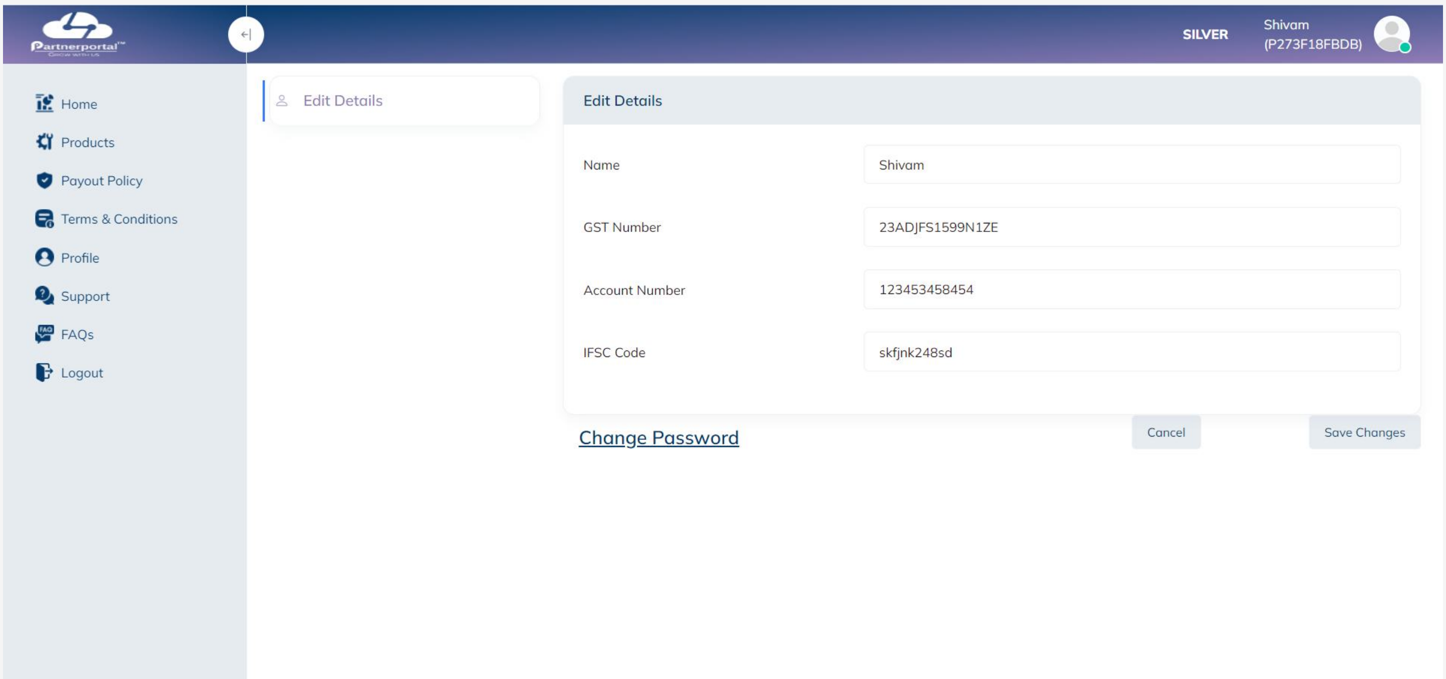
When you click on the Profile section in the menu bar, you will be directed to the profile details page. This page allows you to view all your details and click on Edit Details to edit if necessary. Here's what you can do:

Profile Details - Upon entering the profile section, you'll see all the details of your profile like Email, name, GST number, Bank Details etc.

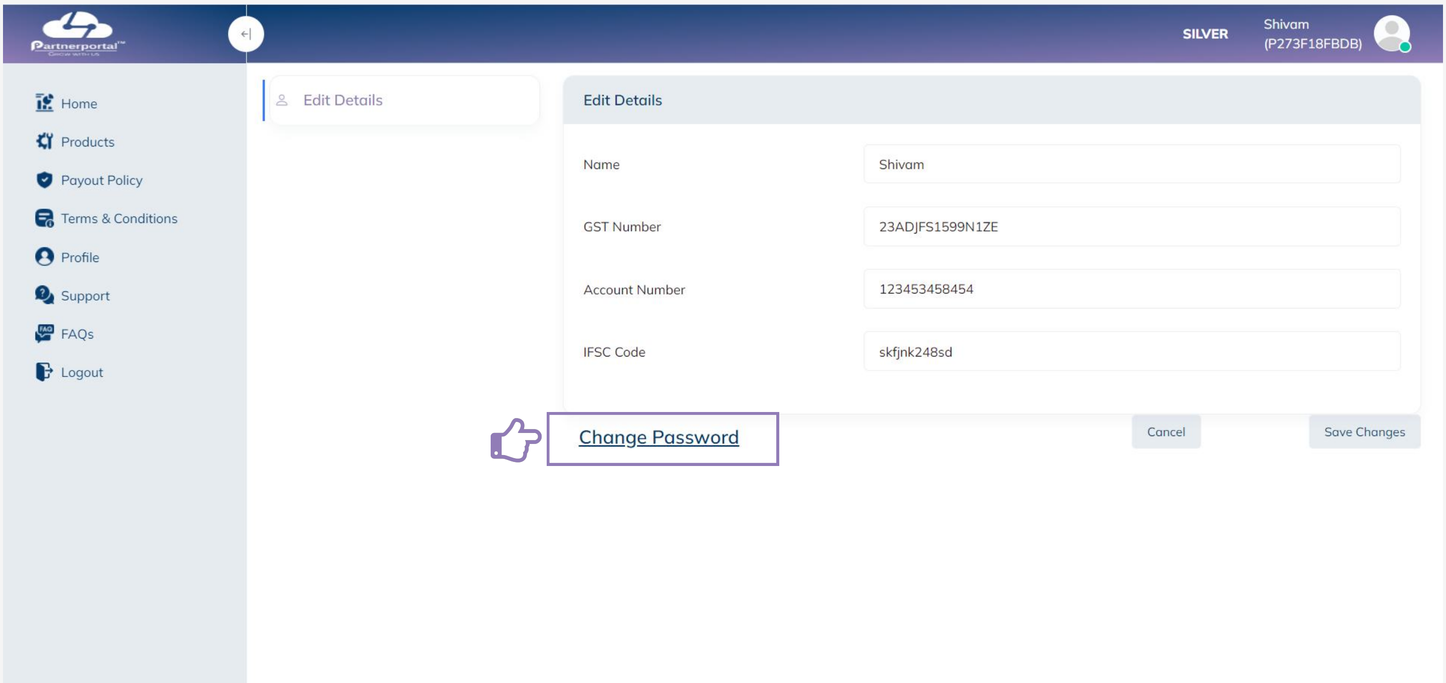


Edit Details - You can update critical information such as your GST Number, Account Number, and IFSC Code by selecting the "Edit Details" option.

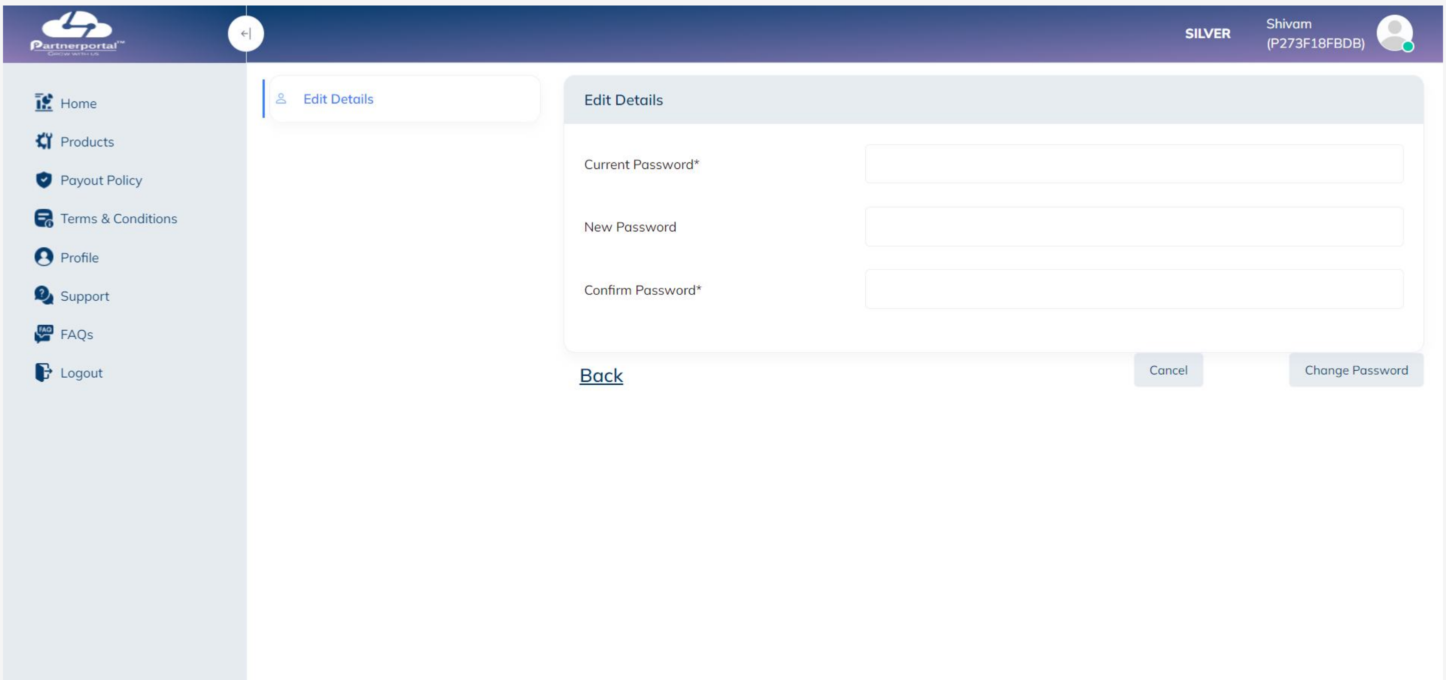


Change Password

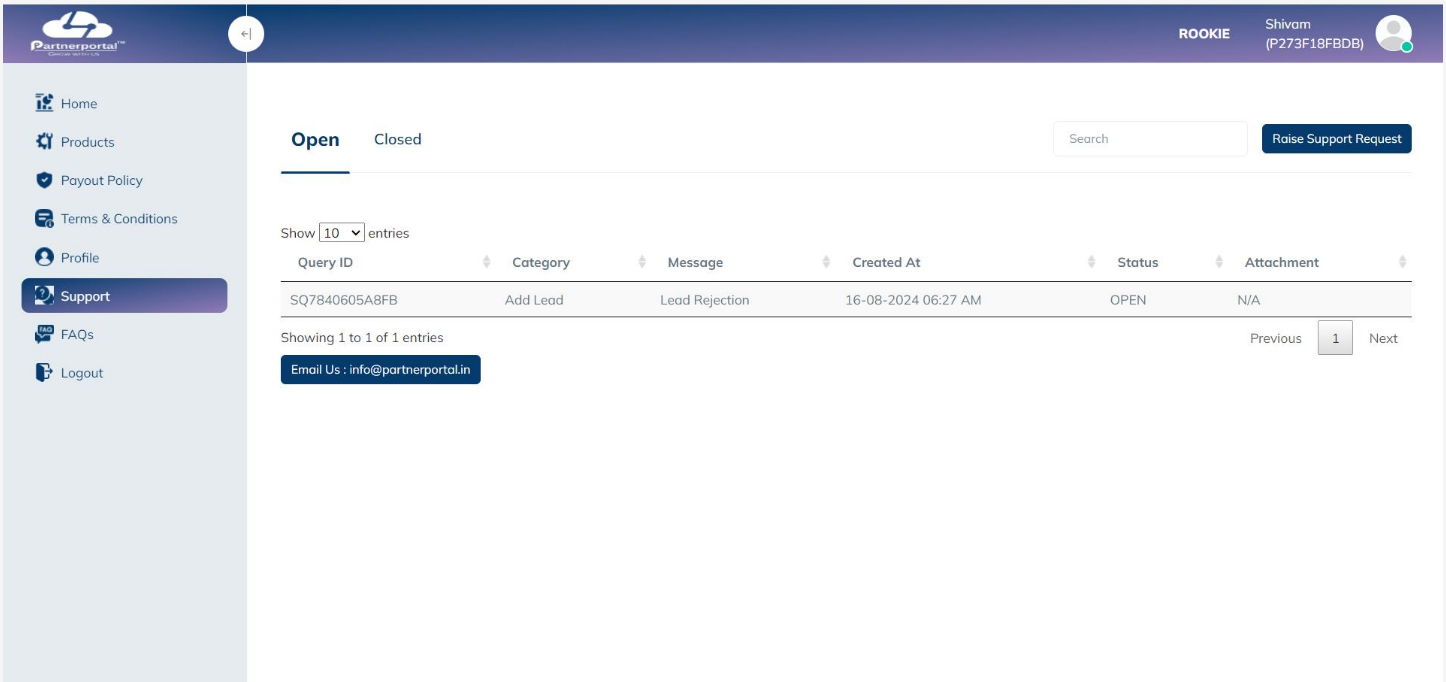
By clicking on "Change Password," in the edit details page you will be redirected to a screen where you can securely create a new password.



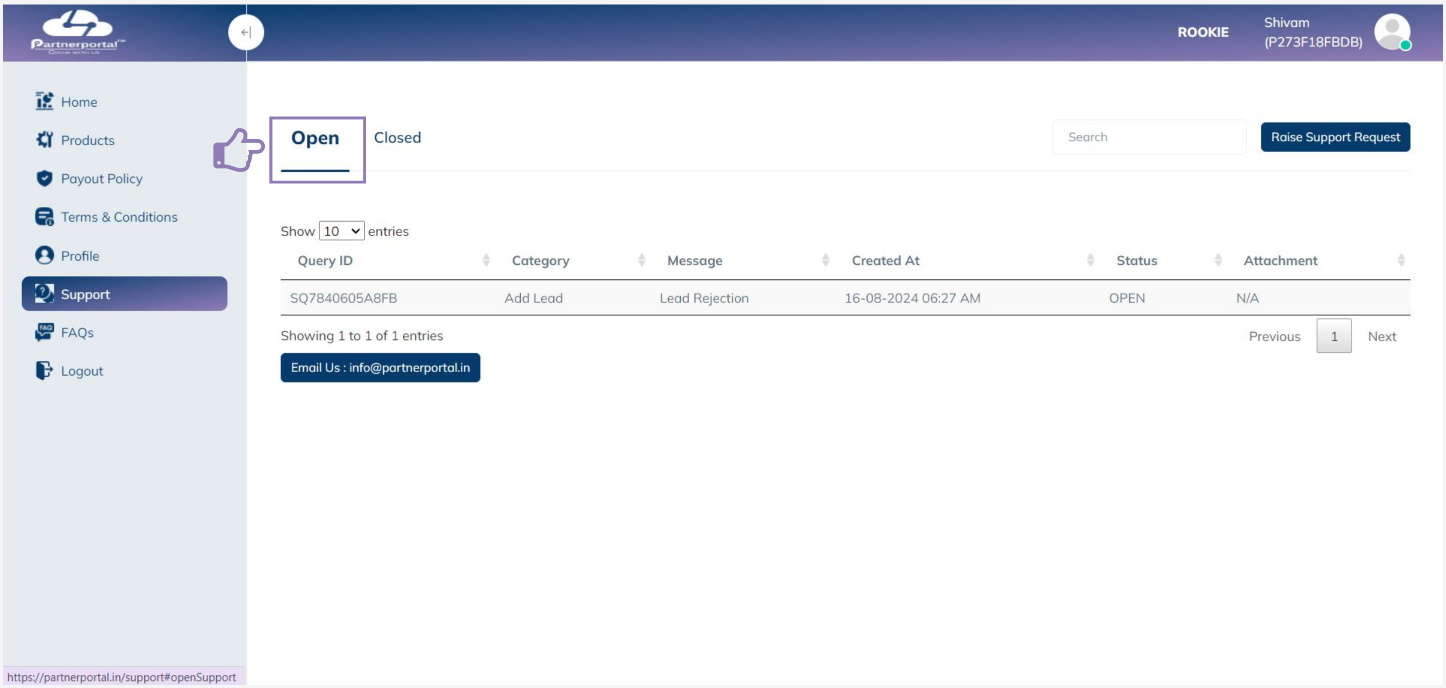
You will need to enter your current password, followed by your new password, and confirm the new password. Click on the "Save Password" button to securely update your password



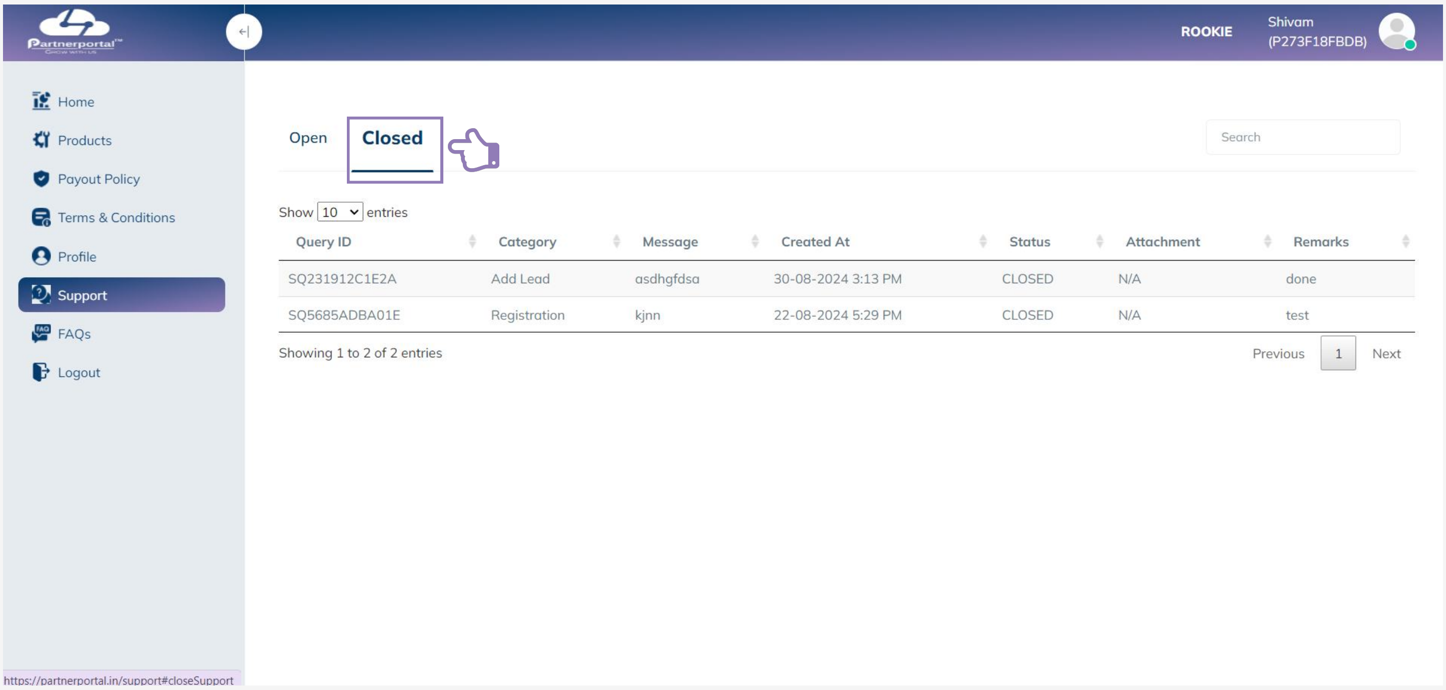
Support - Click on the "Support" in the menu bar to see all queries raised till date.



Open Queries - Queries that are still open will be listed under the "Open" section.

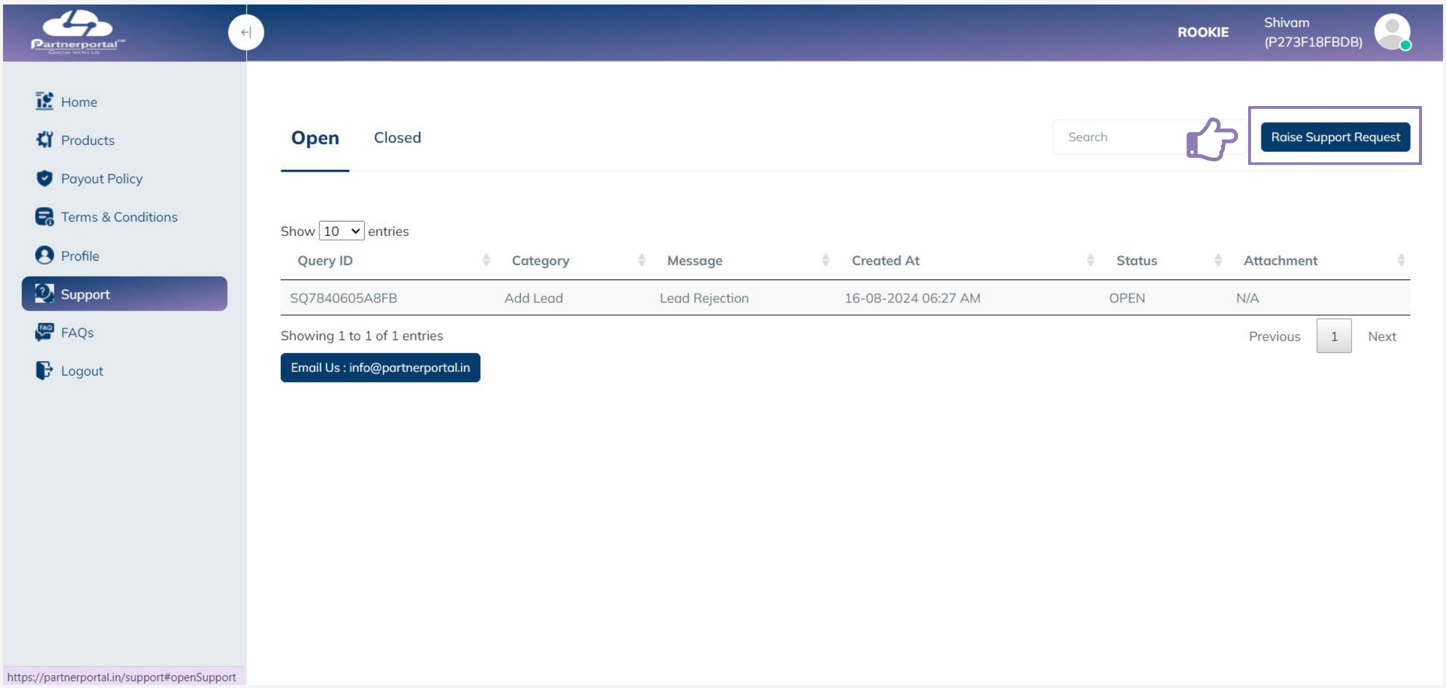


Closed Queries - To review any queries that have already been resolved, check the respective closed queries list.

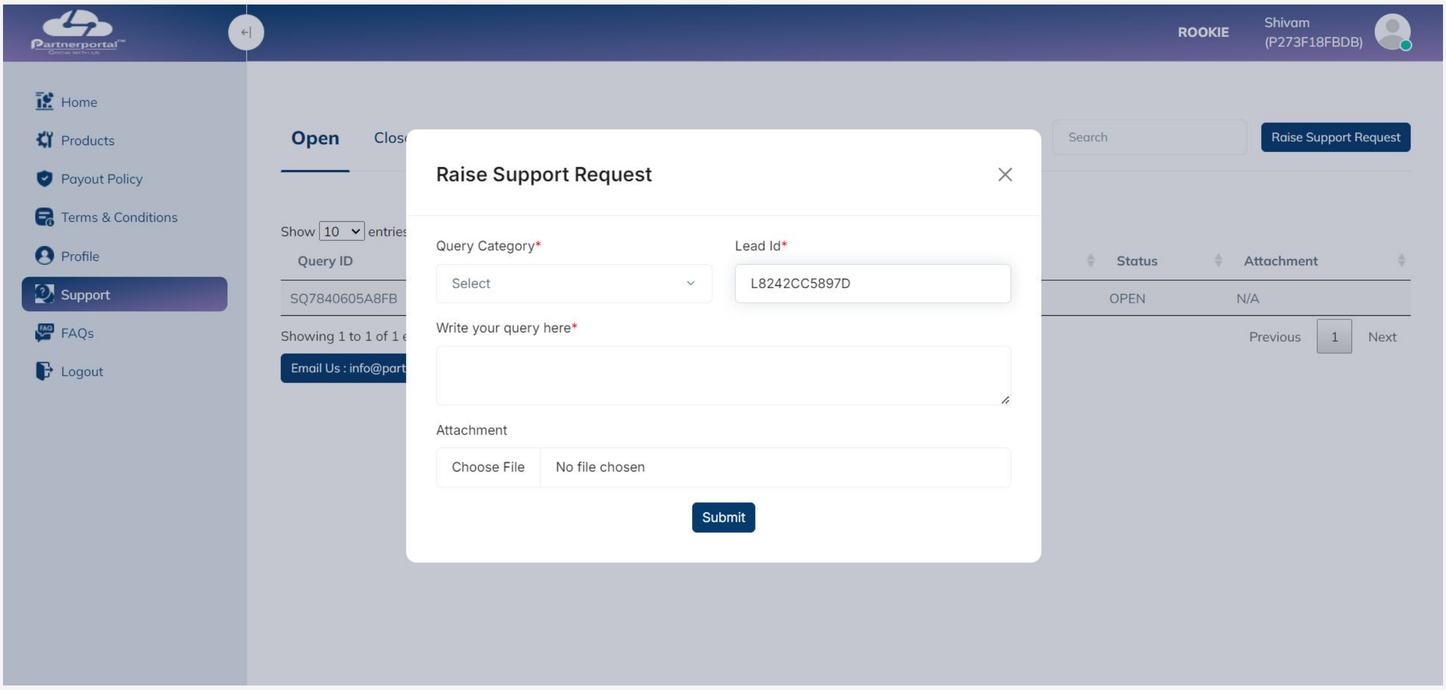


Raise New Query

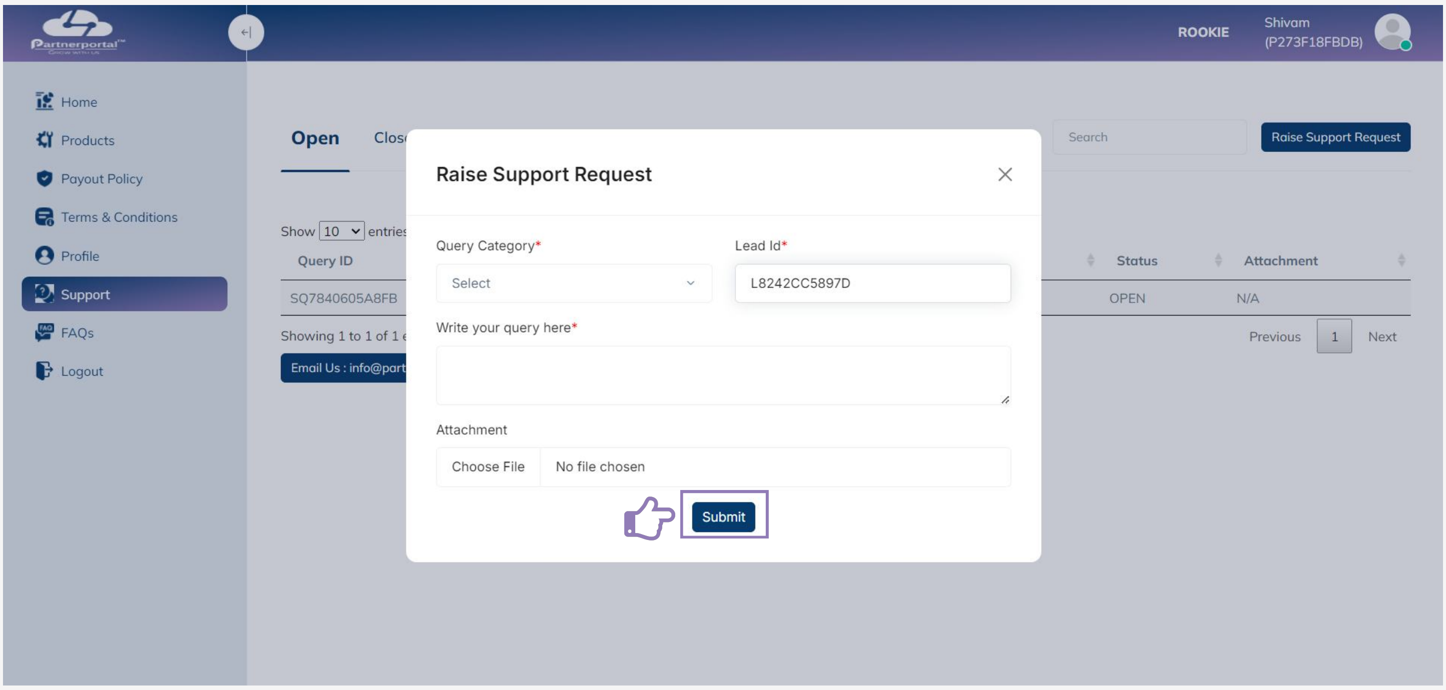
Raise New Query - To submit a new support request, click on the “Raise Support Request” button.



Enter Details - Fill in the required lead details and specify your query.

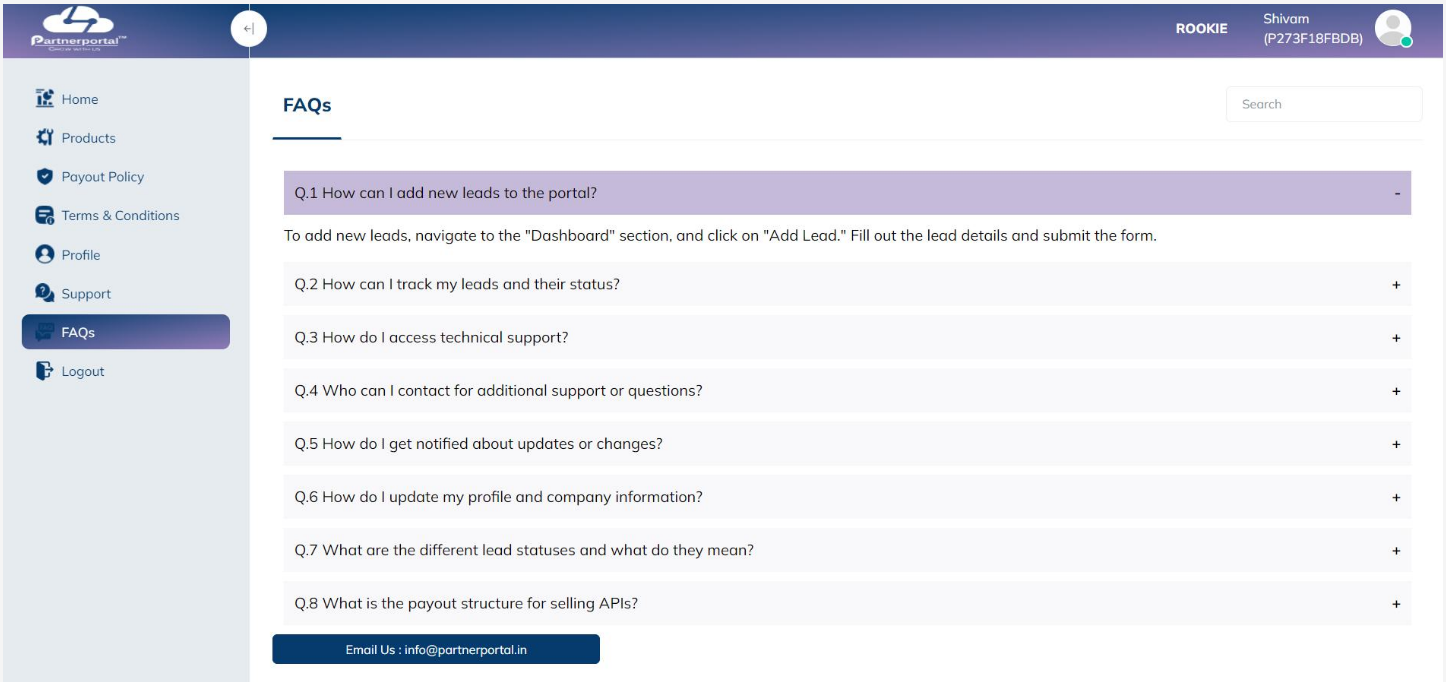


Submit Request - Click “Submit” to raise your new support request.

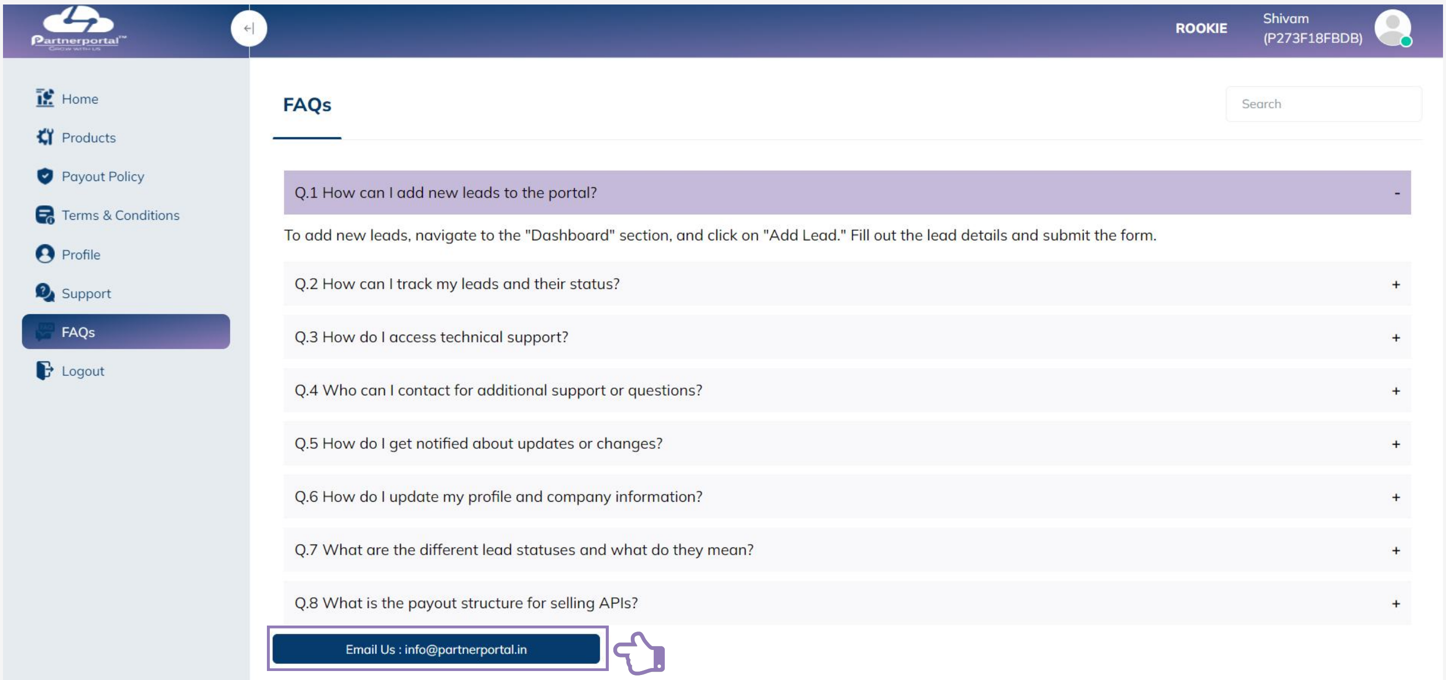


Click on the “FAQs” section in the menu bar to view a comprehensive list of frequently asked questions.

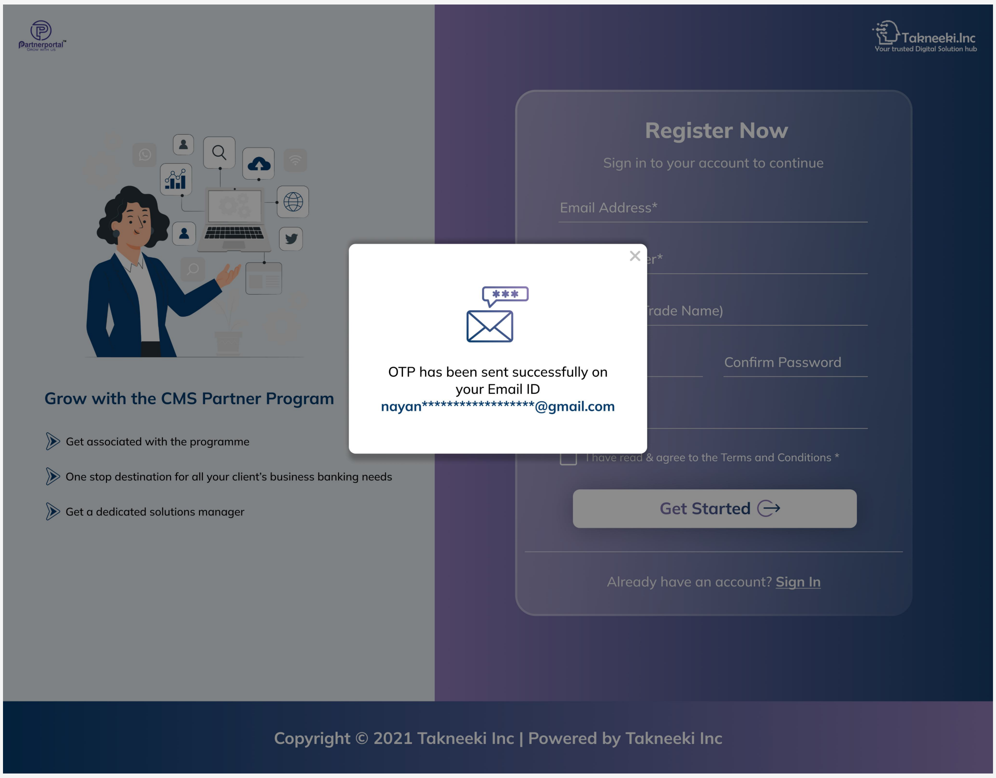
Find Answers - Browse through the FAQs to find answers to common queries and issues.



Contact Support - At the bottom of the FAQ page, you’ll find the support email ID. Use this to email directly for any additional questions or concerns.



Once you click on Get OTP you will get the OTP in your given Email ID.



Enter the OTP and click the "Get Started" button to submit your registration request.