



**YES** Smart Pay

# CUSTOMER PORTAL USER MANUAL



TABLE OF CONTENTS

**CHAPER 1: PAYER INTERFACE .....2**

1.1 Overview ..... 2

1.2 LOGIN SESSION..... 2

    1.2.1 First time login ..... 3

    1.2.2 Login via user id /password..... 5

1.3 CHALLAN /ACKNOLWLEDGEMENT..... 5

    1.3.1 Guest Session ..... 5

    1.3.2 Login Session ..... 6

1.4 MAKING PAYMENT..... 7

**CHAPER 2: RAISING QUERY/DISPUTE.....9**

1.5 Direct via YES Smart Pay Portal..... 9

1.6 Enquire status of query ..... 11

**CHAPER 3: MERCHANT INTERFACE .....12**

3.1 First time Login..... 12

3.2 Merchant access ..... 12

# CHAPER 1: PAYER INTERFACE

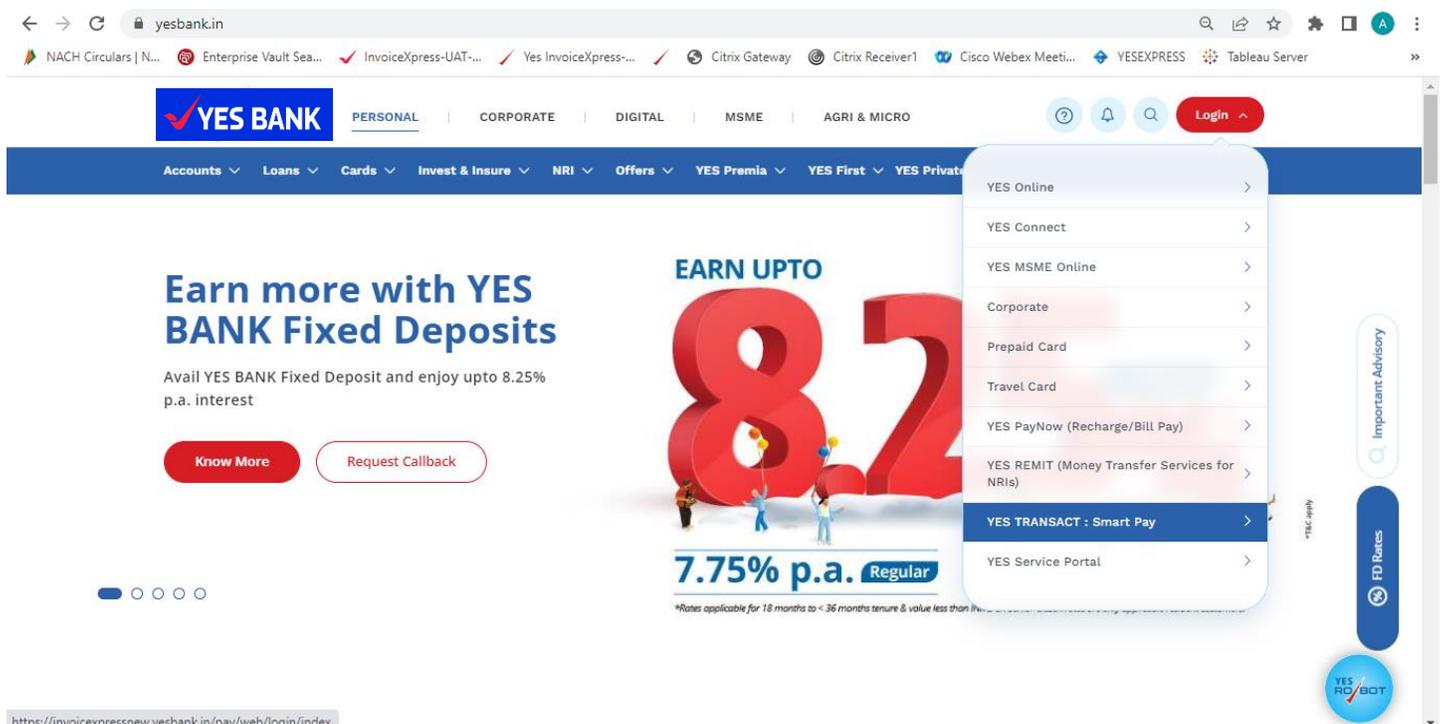
## 1.1 OVERVIEW

Welcome to the YES SMART PAY Customer Portal User Guide. This document is a functional reference on how to use the SMAR PAY Customer Portal. Features available on the SMART PAY Customer Portal include

- Access 24 x 7 to portal
- View /Make payment 24X7 via portal
- Search Payment status Create initial Cases including emergency service issues
- Download payment challan / acknowledgement
- View real-time status of payments
- Raise queries
- View dashboards

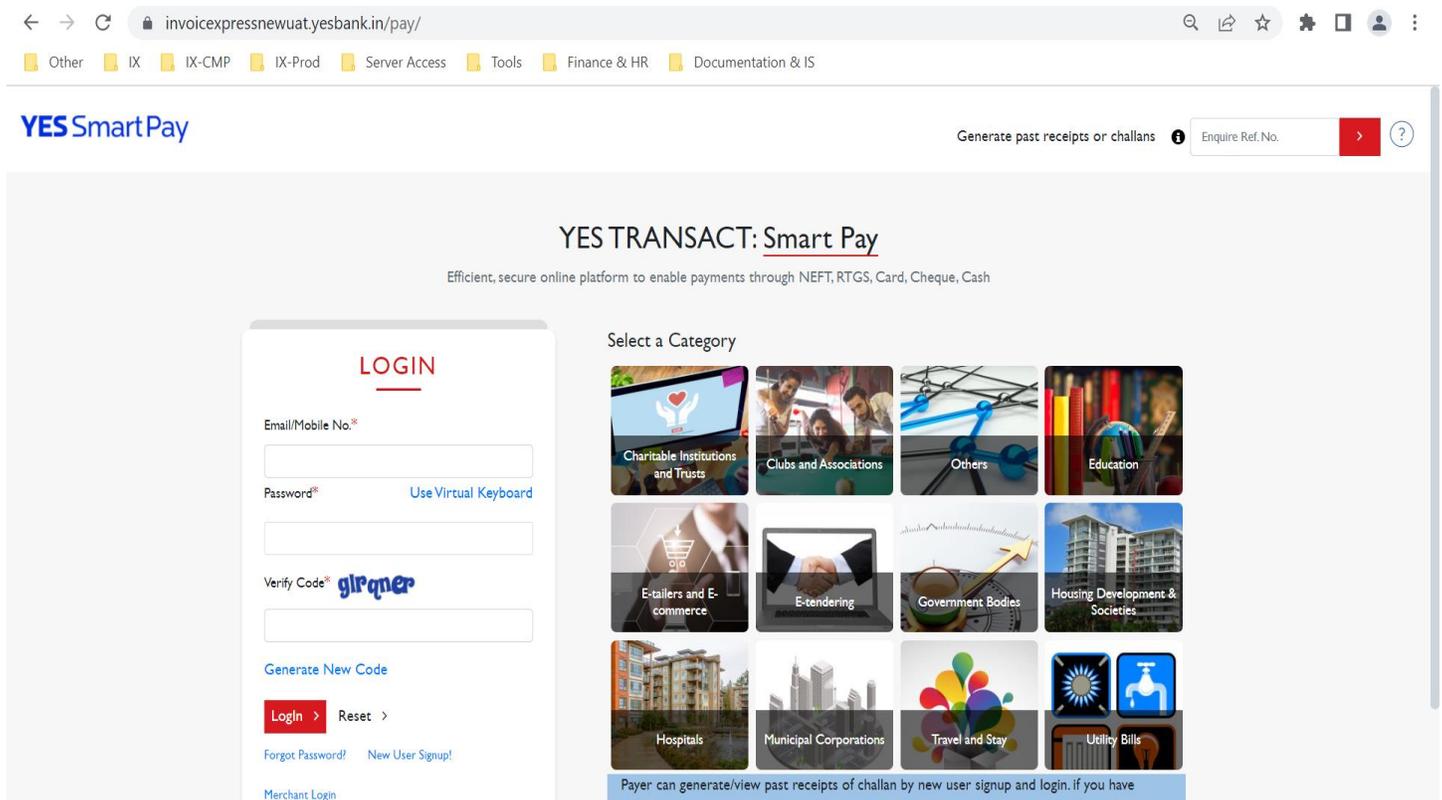
## 1.2 LOGIN SESSION

- Open <https://www.yesbank.in/> in an internet browser



- Select YES Smart Pay from Login TAB -> Click GET STARTED

Alternatively open <https://invoicexpressnew.yesbank.in/pay/web/login/index> in an internet browser



### 1.2.1 First time login

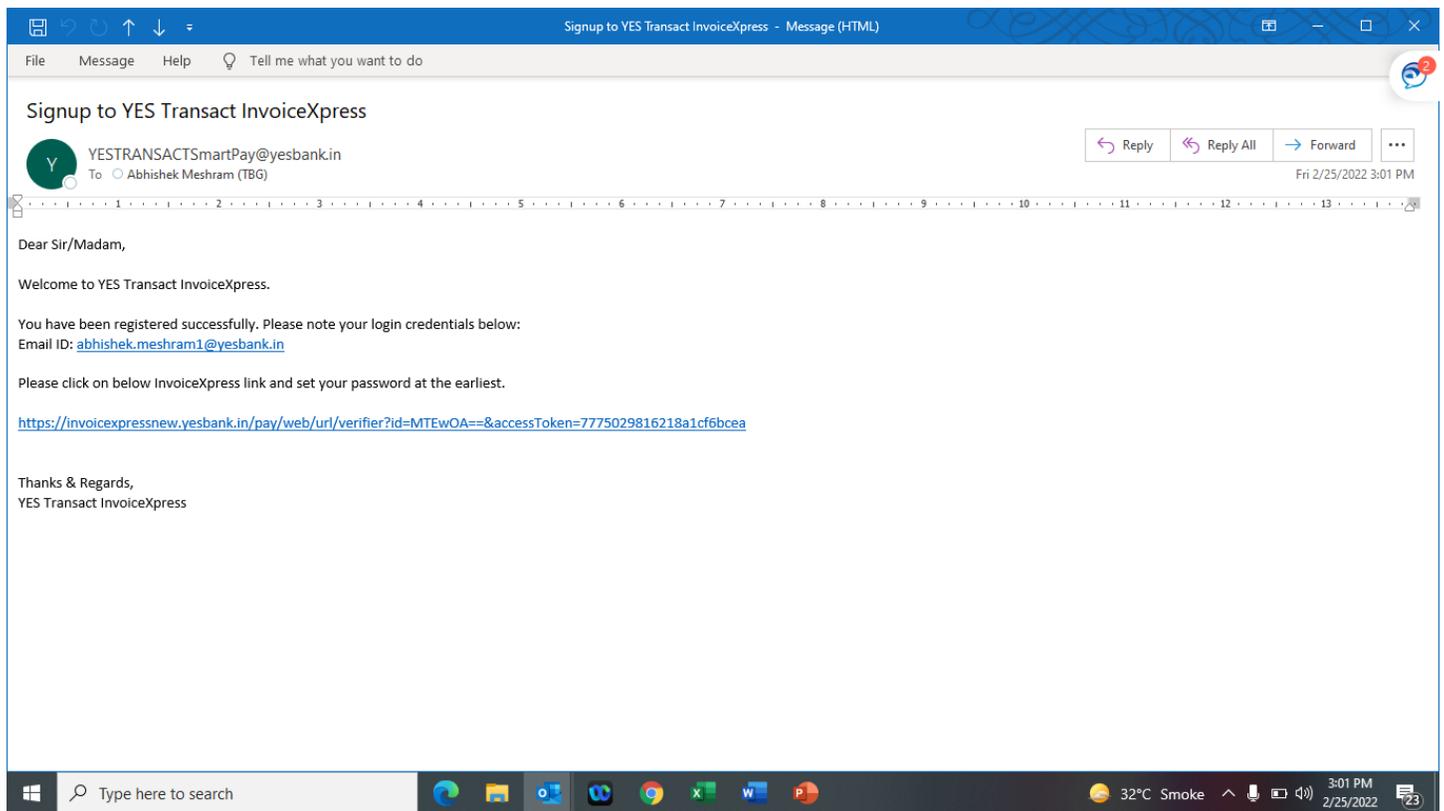
- Click on “NEW USER SIGN UP!” link
- Input user details

[< Back](#)

## SIGN UP

Firstname <input style="width: 90%;" type="text"/>	Lastname <input style="width: 90%;" type="text"/>
Mobile No <input style="width: 90%;" type="text"/>	Email ID <input style="width: 90%;" type="text"/>
Gender <input checked="" type="radio"/> Male <input type="radio"/> Female	Notification for Promotions will be sent via <input type="checkbox"/> SMS <input type="checkbox"/> E MAIL
Verify Code	
<input style="width: 90%;" type="text"/>	
Generate New Code	
<input style="background-color: #e91e63; color: white; padding: 5px 15px; border: none;" type="button" value="CREATE"/>	

☐ Check mail received on the mentioned mail id, click link to generate Password. Please note this link remains valid for 2 Hours. To generate password after this link expiry, click on FORGOT PASSWORD tab to create a password.



☐ To regenerate password / after password link expiry, click on FORGOT PASSWORD tab to create a password.

### FORGOT PASSWORD

Mobile No

OR

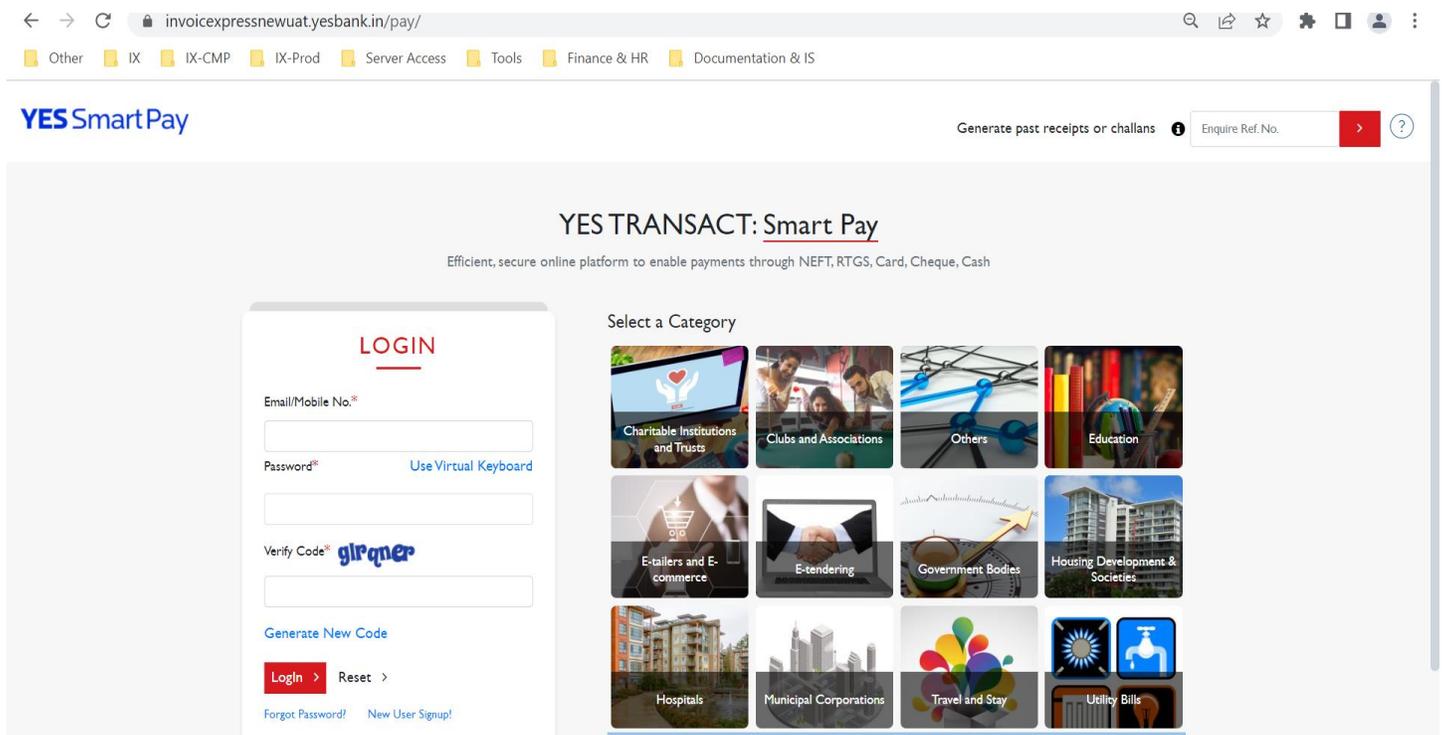
Email ID

Verify Code 

Generate New Code

### 1.2.2 Login via user id /password

- Enter the mobile/ e-mail and password as generated to login.

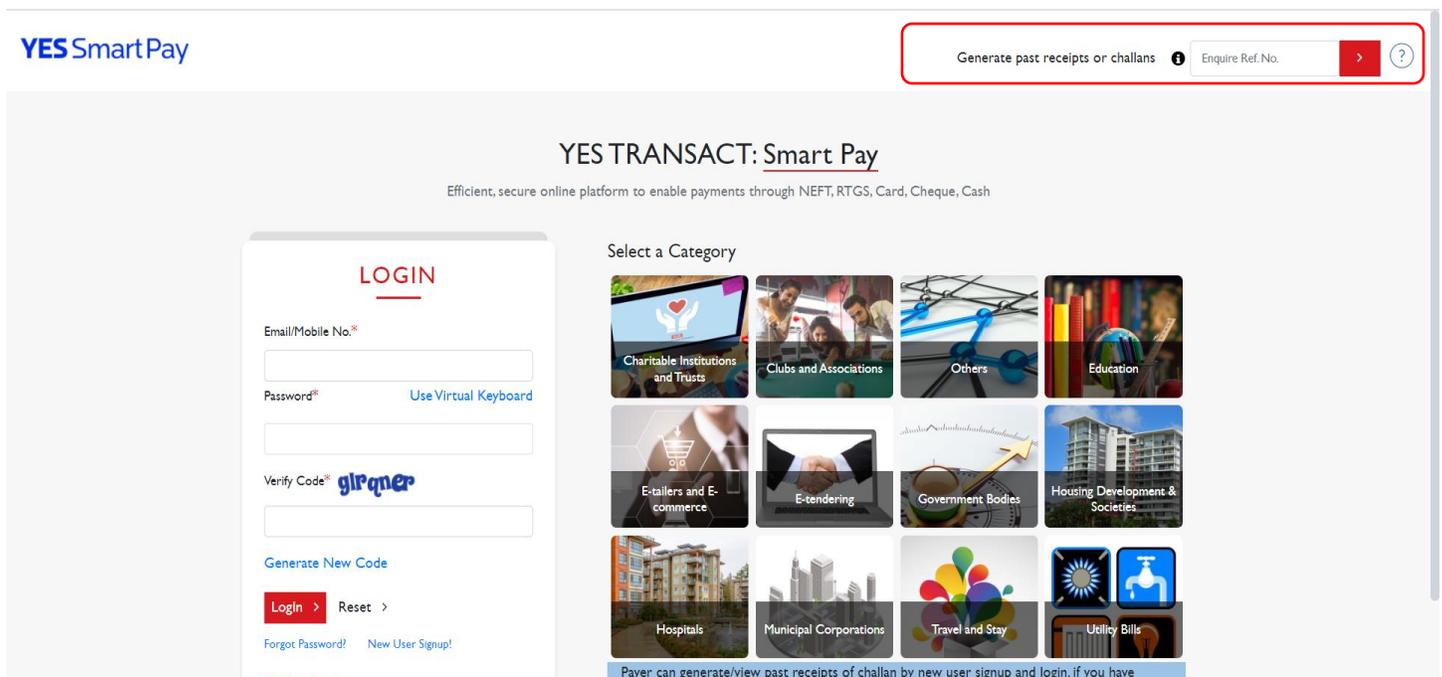


### 1.3 CHALLAN /ACKNOWLEDGEMENT

Payer can generate payment challan / acknowledgement of past payment via following modes:

#### 1.3.1 Guest Session

- Payer to input Transaction reference no. at Home screen <https://invoiceexpressnew.yesbank.in/pay/web/login/index>



☐ Payer is directed to input OTP received on mobile no (no used while making payment)

Your otp has been generated successfully please check for mobile ✕

One time password:

Submit >
Re-Generate OTP >

📌 Kindly enter the OTP received on your mobile. If OTP is not received within 2 mins, Please click on regenerate OTP!

☐ Post successful authentication challan / acknowledgement is displayed for printing / mailing

### 1.3.2 Login Session

☐ Post successful login as detailed in section 1.2 above, Payer can view/generate past challans/ payment acknowledgement.

invoicexpressnewuat.yesbank.in/client/web/dashboard/merchant
🔍 📄 ⭐ ⚙️ 🗂️ 👤 ⋮

Other IX IX-CMP IX-Prod Server Access Tools Finance & HR Documentation & IS

**YES SmartPay**
Welcome Vishal Gurav 🔒 ? 🗑️

Dashboard
Non-Invoice ▾ Transaction Date ▾

19052023 DB I ▾
1 Year 6 Months Last Month **This Month** From Date 📅 To Date 📅 Pending Action ▾

Total Collection Status 🔄

Total Collection Initiated

₹ 15,010.00

Count : 6

Total Collection Received

₹ 1,005.00

Count : 1

Total Settlement Pending

₹ 0.00

Count : 0

Total Challan Pending

₹ 0.00

Count : 0

Summary
View More
Transaction Mode

Collection Initiated			Collection Received		
Raised	Count	Raised	Collected Count	Collected Amount	
Insta Collect	1	10.00	0	0.00	
DB Validation	5	15,000.00	1	1,005.00	
Invoice	0	0.00	0	0.00	
Payer Initiated	0	0.00	0	0.00	
Total Collected	-	-	-	1,005.00	

Paid
Challan Pending
Expired

Paid Transaction

## 1.4 MAKING PAYMENT

- Payment can be made via logged in session or guest session. For both the session following process can be followed.
- Client to select the category type, within which corporate /institutions name is displayed.

- Click on the corporate for which payment is to be made, can search corporate name by clicking on starting alphabet at side bar

payer to key in details as sought by corporate /institution and proceed to pay


1000 FEET

Treker\_ID

Email\*

Due Date  

Verify Code\*

Mobile No\*

Amount\*



[Generate New Code](#)

Submit >
CANCEL ✕

payer to select payment mode and proceed to pay


xxxxxxx TOURS & TRAVELS
< Back

Emp No : 1

Email : @XXXXXXXXXX

Due Date : 11-Mar-22

Mobile No : XXXXXXXX

Amount : XXXXXXXX

Reference No. : 2222XXXXX  
(Save For Future Reference)

**Terms and Conditions:**  
 Down/Session Timeout: In case the Website is experiencing any server related issues like 'slow down' or 'failure' or 'session timeout', the User shall, before initiating the second payment, check whether his/her bank account has been debited or not and accordingly resort to one of the following options: (i) In case the bank account appears to be debited, ensure that he/ she does not make the payment twice and immediately thereafter contact the Merchant via a mail or any other mode of contact as provided by the Merchant to confirm payment. (ii) In case

## Payment Options

INTERNET BANKING
DEBIT CARD
CREDIT CARD
NEFT / RTGS / IMPS
CASH
CHEQUE / DEMAND DRAFT
UPI

Base Amount : ₹ 7XXXXX

Late Fee : ₹ XXXXXXX

Total Amount to be paid : ₹ 6XXXX

Payment Via ISG 
i

Payment Via EaseBuzz 
i

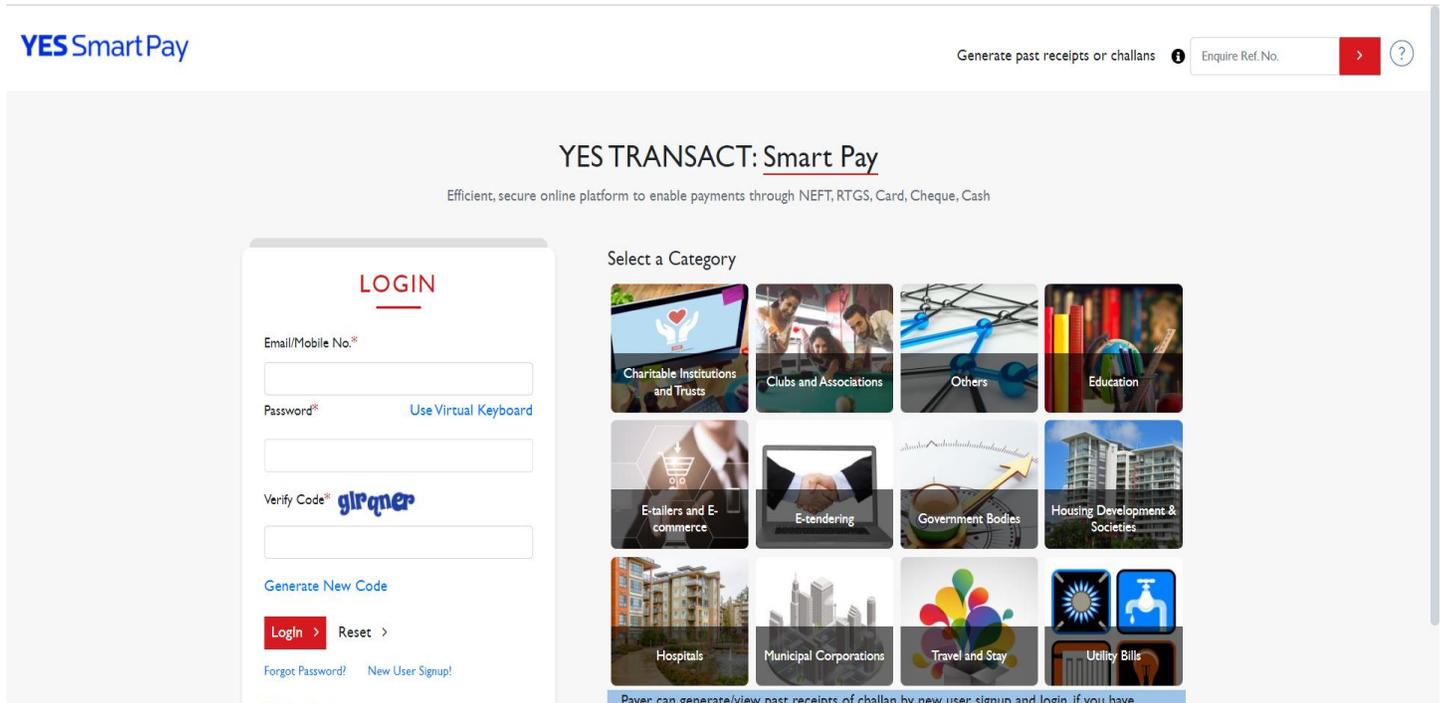
Payment Via PayU 
i

## CHAPTER 2: RAISING QUERY/DISPUTE

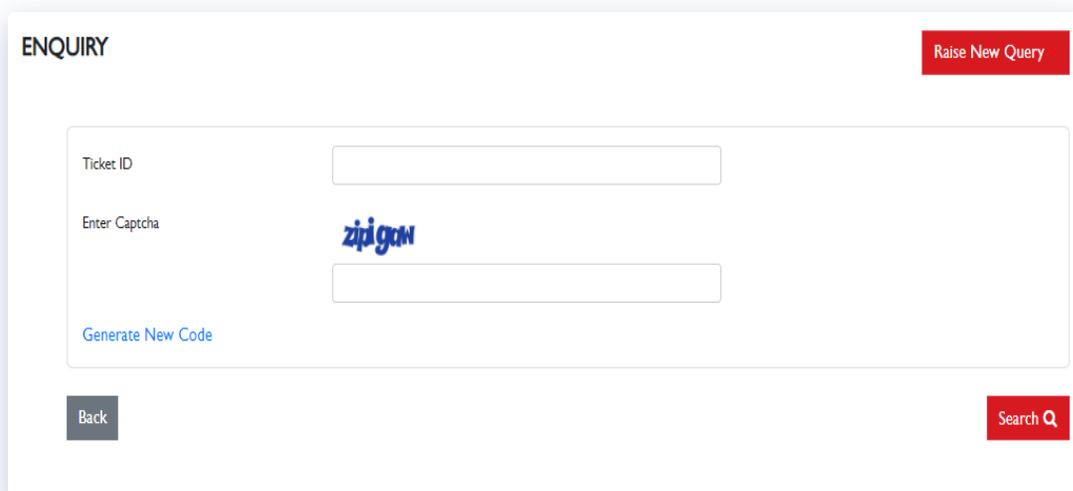
Payer can raise queries related with the transaction etc via YES SMART PAY portal itself.

### 1.5 DIRECT VIA YES SMART PAY PORTAL

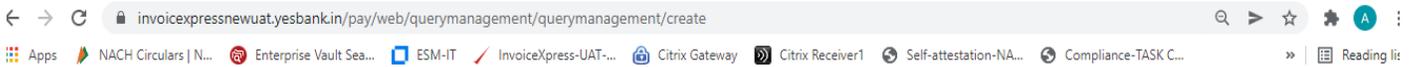
- Click on Question Mark icon 



- Click on RAISE NEW QUERY, For ENQUERY of existing query, client to input ticket id, Captcha and click on search



□ Input details as per following screen and submit the query details



### RAISE QUERY < Back

Name

Email ID

Query Description

(Please ensure to mention the transaction reference while raising the query request on initiated transaction)

Enter Captcha

[Generate New Code](#)

Mobile No

Query Category Selection

- Select a query category
- Select a query category
- Transaction Related Query
- Invoice Related Query
- User ID related Query
- Report Related Query
- Others

Clear
Cancel
Submit

□ Post submit, Ticket no is generated, and status of query is displayed.

### VIEW QUERY

Your query has been submitted successfully. Please note your Ticket No SB0000000273 for future enquiry ✕

Ticket ID

Search Q

Raise New Query

#	Ticket ID	Name	Status	Last Updated Date	Action
	<input type="text"/>	<input type="text"/>	Select Status <input type="text"/>		
1	SB0000000273	abhisheke	Pending	11-MAR-22 03:52:28 PM	

## 1.6 ENQUIRE STATUS OF QUERY

To get the status of query raised earlier, customer to input ticket no, CAPTCHA and submit. Post validation, payer to input OTP received on the mobile no inputted during raising query//

ENQUIRY
Raise New Query

Ticket ID

Enter Captcha





Generate New Code

Search

Back

Search

- Post OTP validations, status of query is displayed. Further action can be taken on clicking it for details.

### VIEW QUERY

Ticket ID

Search

Raise New Query

#	Ticket ID	Name	Status	Last Updated Date	Action
	<input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>	Select Status		
I	SB0000000273	abhisheke	Pending	11-MAR-22 03:52:28 PM	

## CHAPTER 3: MERCHANT INTERFACE

Merchant / Corporate can login to YES SMART PAY merchant Customer Portal via credentials generated at part of onboarding. The portal can be accessed via Visiting YES BANK website as detailed under 1.2 above.

- ☐ Merchant to click on MERCHATN LOGIN Access

### 3.1 FIRST TIME LOGIN

- ☐ Merchant to Check mail received on the mail id provided during onboarding. Merchant user to click link to generate Password. Please note this link remains valid for 2 Hours. To generate password after this link expiry, click on FORGOT PASSWORD tab to create a password.

### 3.2 MERCHANT ACCESS

- ☐ Merchant to on successful authentication and OTP Validation can login to view dashboard, create template and generate MIS.
- ☐ For any queries etc. merchant can reach out to RM /PSM / Cms Helpdesk [CMS.HELPDESK@YESBANK.IN](mailto:CMS.HELPDESK@YESBANK.IN)