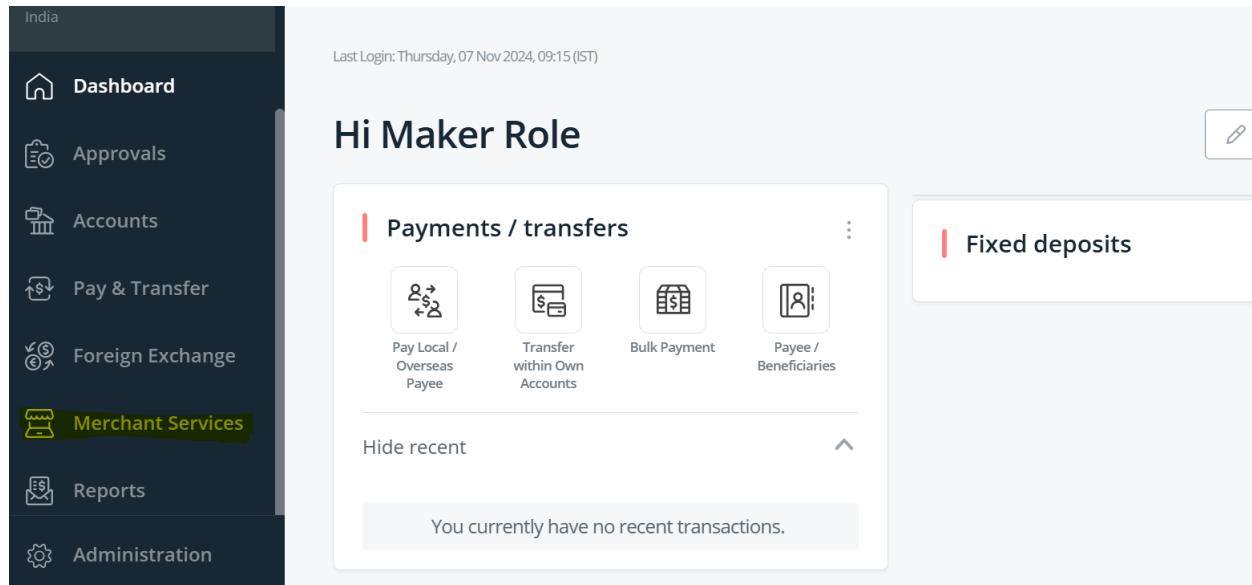




OUTLET Creation

Login into IDEAL and click on Merchant Services



The screenshot shows the DBS IDEAL Merchant Services dashboard. On the left is a dark sidebar with a menu: India, Dashboard, Approvals, Accounts, Pay & Transfer, Foreign Exchange, **Merchant Services** (highlighted in yellow), Reports, and Administration. The main content area has a light gray background. At the top, it says 'Last Login: Thursday, 07 Nov 2024, 09:15 (IST)'. Below this is the heading 'Hi Maker Role' with an edit icon. The dashboard is divided into two main sections. The left section is titled 'Payments / transfers' and contains four icons: 'Pay Local / Overseas Payee', 'Transfer within Own Accounts', 'Bulk Payment', and 'Payee / Beneficiaries'. Below these icons is a 'Hide recent' link and a message box stating 'You currently have no recent transactions.' The right section is titled 'Fixed deposits'.

Welcome screen – Welcome screen will appear when the CIF ID does not have any outlet (VPA) created.

To create VPA, user needs to click on **“Apply now”** under MAX App tile

DBS IDEAL
ABC Company
India

← To Dashboard
Merchant Services

Merchant Services

Welcome to DBS Merchant Services!

DBS Merchant Services provides a wide range of online and offline payment collection methods through DBS MAX App or terminals. Apply today to start collecting payments in the way that best suits your business and customer needs!

Centralised reporting
View all your daily transactions, automatic reconciliations and make refunds in one place.

Easy to scale
Add new outlets, points of sale and product extensions for your growing business anytime.

Collect payments instantly
Speed up the collection of payments from your customers and receive real-time notifications.

We help you accept different payment solutions.	Static & Dynamic QR	International Card Schemes	Payment Gateway
Mobile App	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
POS Terminals	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
eCommerce Web/App	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Start with one of our pre-selected options below:

Accept in-person payments using POS terminals

I'm interested

Go Cashless instantly with cards and UPI collection with our referral partners.

Rent Point of Sale (POS) terminal with DBS Partner

Payments accepted:
VISA RuPay L1P

Accept UPI payments via DBS MAX App

Apply now

Get access to payment collection via UPI and QR codes.

Via DBS MAX App

Payments accepted:
L1P

Accept e-commerce payment

I'm interested

Manage online collection through various modes like CARD, Net Banking, UPI with our referral partner.


Payments accepted:
VISA RuPay L1P

Privacy Policy
Terms & Conditions

© 2021 DBS Bank Ltd
Co. Reg. No. 196800306E

Profile & Settings
Log out

User needs to input below mandatory information


DBS IDEAL
BUSINESS PREFERRED TEST
 India

[To Dashboard](#)
[Merchant Services](#)
[Overview](#)
[Transactions](#)
[Analytics](#)
[Approvals](#)
[MAX App Users](#)
[MAX Outlets](#)
[Products](#)
[Reports](#)
 Maker Role

Collection point
 Company name
 BUSINESS PREFERRED TEST


How many physical outlet do you have?
 Number of outlets:
 Single

Outlet name 0/60

Settlement account
 Select ▼
To credit your outlet earnings

Payment method - UPI
 Create VPA ID *
 @dbs [Check availability](#)

Input the outlet name
 Select the account no. from Drop down
 Input the desired VPA ID


DBS IDEAL
BUSINESS PREFERRED TEST
 India

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 Maker Role

Merchant category code (MCC)
 Merchant category code (MCC) *
 2842 - Speciality cleaning, polishing and sanitation preparations

Outlet Address
Please note changes made to your address here will not be reflected in your DBS related accounts.
 Address line 1 * 0/100

 Address line 2 0/100


 State *
 Select ▼
 City/District * 0/25

 Pin Code * 0/6

MCC to be selected from drop down list.
 only for sole prop / individual 7407
 i.e. P2PM will be pre-filled and will now allow user to change
 Address needs to be filled in. Section with (*) marks is mandatory field.
 Once all section is filled, can be sent for approval by clicking next

By clicking "Next", you confirm that you have read, understood, and agree to the [Terms and Conditions Governing DBS MAX and related policies.](#)
[Cancel](#) [Next](#)

Click on **"NEXT"** and review the submission



BUSINESS PREFERRED TEST
India

← To Dashboard

Merchant Services

Overview

Transactions

Analytics

Approvals

MAX App Users

MAX Outlets


Products

Reports

Maker Role

× Create outlet / Apply for UPI QR scheme

Review

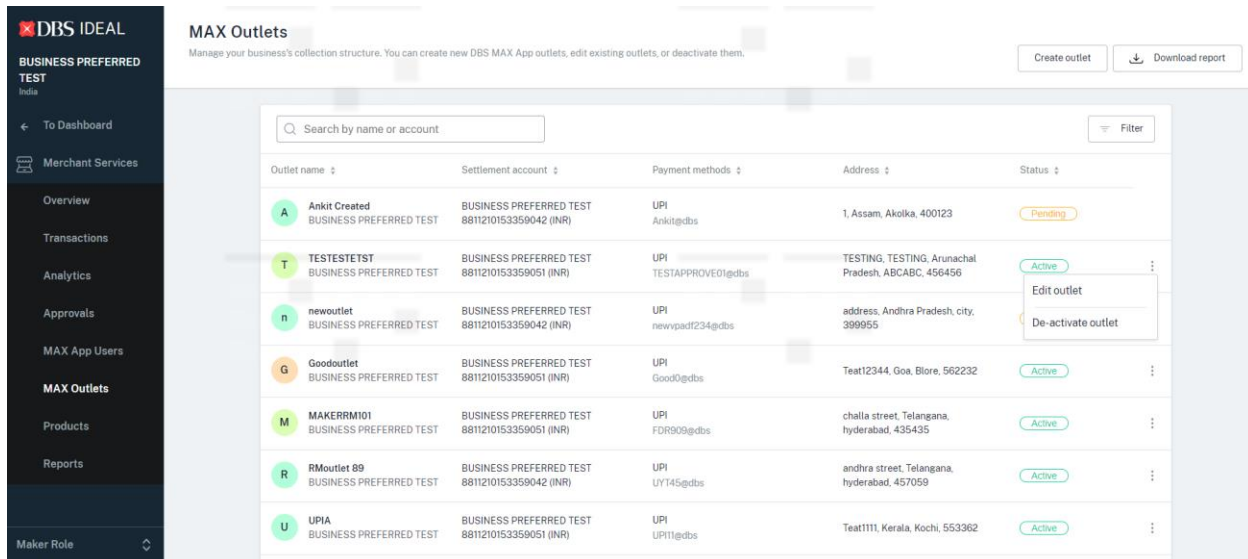
Company name BUSINESS PREFERRED TEST	Outlet name Ankit Created
Outlet Address a, Jharkhand, Akola, 400012	Settlement account BUSINESS PREFERRED TEST 8811210153359042 (INR)
 Payment method UPI	VPA ID ankit@dbb
Merchant category code (MCC) 2842- Speciality cleaning, polishing and sanitation preparations	

Back
Submit

Once submitted, the checker needs to approve the outlet creation by login into IDEAL. If the user has **"self-approve"** access in IDEAL the outlet will be automatically created.

Edit Outlet or Deactivate Outlet

By clicking on the 3 dots, the user can edit outlet or deactivate outlet



DBS IDEAL
BUSINESS PREFERRED TEST India

MAX Outlets
Manage your business's collection structure. You can create new DBS MAX App outlets, edit existing outlets, or deactivate them.

Create outlet Download report

Search by name or account Filter

Outlet name	Settlement account	Payment methods	Address	Status
Ankit Created BUSINESS PREFERRED TEST	BUSINESS PREFERRED TEST 881210153359042 (INR)	UPI Ankit@dbis	1, Assam, Akolka, 400123	Pending
TESTTESTST BUSINESS PREFERRED TEST	BUSINESS PREFERRED TEST 881210153359051 (INR)	UPI TESTAPPROVE01@dbis	TESTING, TESTING, Arunachal Pradesh, ABCABC, 456456	Active
newoutlet BUSINESS PREFERRED TEST	BUSINESS PREFERRED TEST 881210153359042 (INR)	UPI newspad1234@dbis	address, Andhra Pradesh, city, 399955	Active
Goodoutlet BUSINESS PREFERRED TEST	BUSINESS PREFERRED TEST 881210153359051 (INR)	UPI Good0@dbis	Teat12344, Goa, Blore, 562232	Active
MAKERRM101 BUSINESS PREFERRED TEST	BUSINESS PREFERRED TEST 881210153359051 (INR)	UPI FDR909@dbis	challa street, Telangana, hyderabad, 435435	Active
RMoutlet 89 BUSINESS PREFERRED TEST	BUSINESS PREFERRED TEST 881210153359042 (INR)	UPI UY145@dbis	andhra street, Telangana, hyderabad, 457059	Active
UPIA BUSINESS PREFERRED TEST	BUSINESS PREFERRED TEST 881210153359051 (INR)	UPI UPI11@dbis	Teat1111, Kerala, Kochi, 553362	Active

Dropdown menu for TESTTESTST:
Edit outlet
De-activate outlet

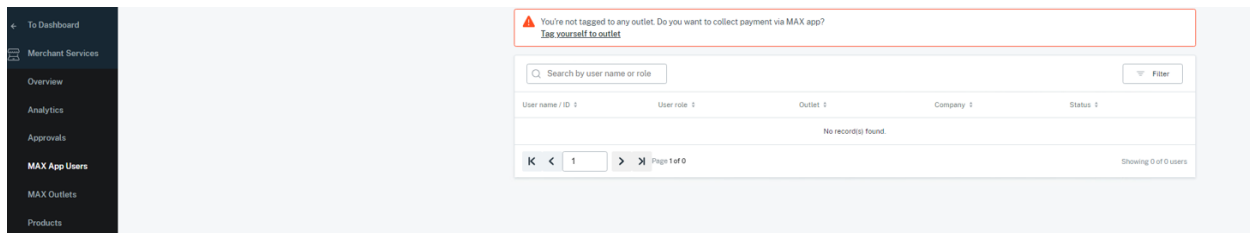
USER Creation

What is the type of User in a Merchant Portal ?

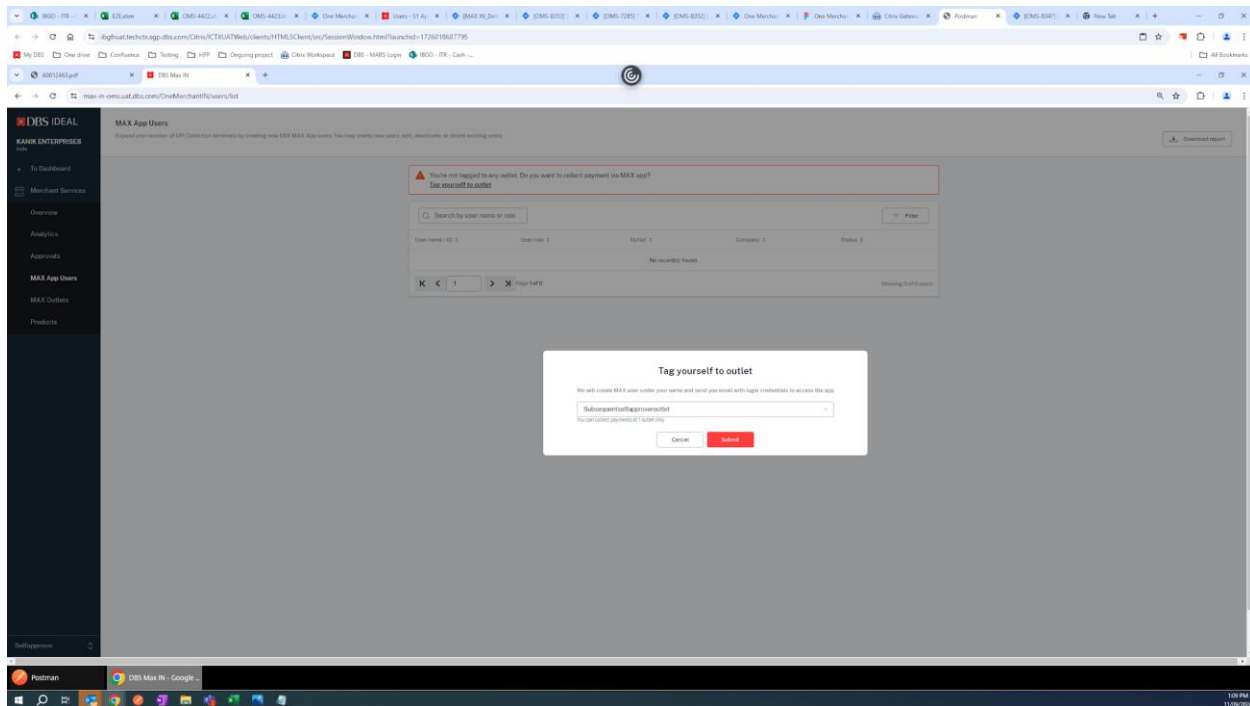
- **Group User** – IDEAL maker / checker / Self-approve user are the Group user. Have access to create outlet / users
- **Outlet Manager** - Manager of the outlet. Can create wallet users / more outlet manager for the specific outlet. Will have 1FA access of Merchant Portal and DBS MAX app access
- **Wallet User** – Wallet users are the DBS MAX app user.

First user creation

For the first time user, first the Group User needs to tag themselves to the outlet. So, with tagging the Group user can use IDEAL credentials to login into the DBS MAX App. Refer below screen –



When user clicks on **"Tag yourself to the outlet"**, the below screen appears. GU needs to select the outlet from the drop down -



Once Group user tags to an outlet, then he/ she can can download DBS MAX app from app store / Play store and use IDEAL login credentials to access the app

✖ Create More Users

Post tagging to the outlet, User can create more Outlet manager / Wallet Users.
To create more user, the user needs to click on **“Create a New Users”**

BUSINESS PREFERRED TEST

- To Dashboard
- Merchant Services
- Overview
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- Approvals
- MAX App Users**
- MAX Outlets
- Products
- Reports

MAX App Users

Expand your number of UPI Collection terminals by creating new DBS MAX App users. You may create new users, edit, deactivate, or delete existing users.

[Create a new user](#) [Download report](#)

User name / ID	User role	Outlet	Company	Status	
testing USER001	Outlet Manager	RMOUTLET45	BUSINESS PREFERRED TEST	Active	
TESTING MAXAPP01	Wallet User	INBUSI OUTLET X3	BUSINESS PREFERRED TEST	Active	
Maker Role INBUSI01501	Group User	INBUSI OUTLET X3	BUSINESS PREFERRED TEST	Active	
HAPPY OM HAPPY01	Outlet Manager	Happy Outlet	BUSINESS PREFERRED TEST	Active	
testing OMCSYSTEM	Outlet Manager	TEST40	BUSINESS PREFERRED TEST	Active	
rmuser RMUSER001	Wallet User	TEST40	BUSINESS PREFERRED TEST	Active	
TESTING IOS WRONGSMS01	Outlet Manager	TEST40	BUSINESS PREFERRED TEST	Active	
test ANDROIDSMS2	Wallet User	TEST40	BUSINESS PREFERRED TEST	Active	
TESTING ERROR001	Outlet Manager	TEST40	BUSINESS PREFERRED TEST	Active	
TESTING ERROR006	Wallet User	TEST40	BUSINESS PREFERRED TEST	Active	

BUSINESS PREFERRED TEST

- To Dashboard
- Merchant Services
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- Analytics
- Approvals
- MAX App Users**
- MAX Outlets
- Products
- Reports

Select the outlet for which access needs to be given to the new user.

Mention the desired user ID

What role needs to be give to the user (Wallet / Outlet)

What user can do with access

Create New User

Collection point

Company that user belongs to

BUSINESS PREFERRED TEST

How many users do you have?

Number of users

Single

User will be collecting payments for *

Goodoutlet

VPA ID

Good@dba

Login Details

User ID *

Enter 5-20 alphanumeric characters, i.e. A-Z, 0-9

What's the role of this user?

☒ Wallet User

☐ Outlet Manager

What can this user do?

☒ Collect payment on DBS MAX App

☐ Perform refunds on DBS MAX App

User particulars

Name *

0/50

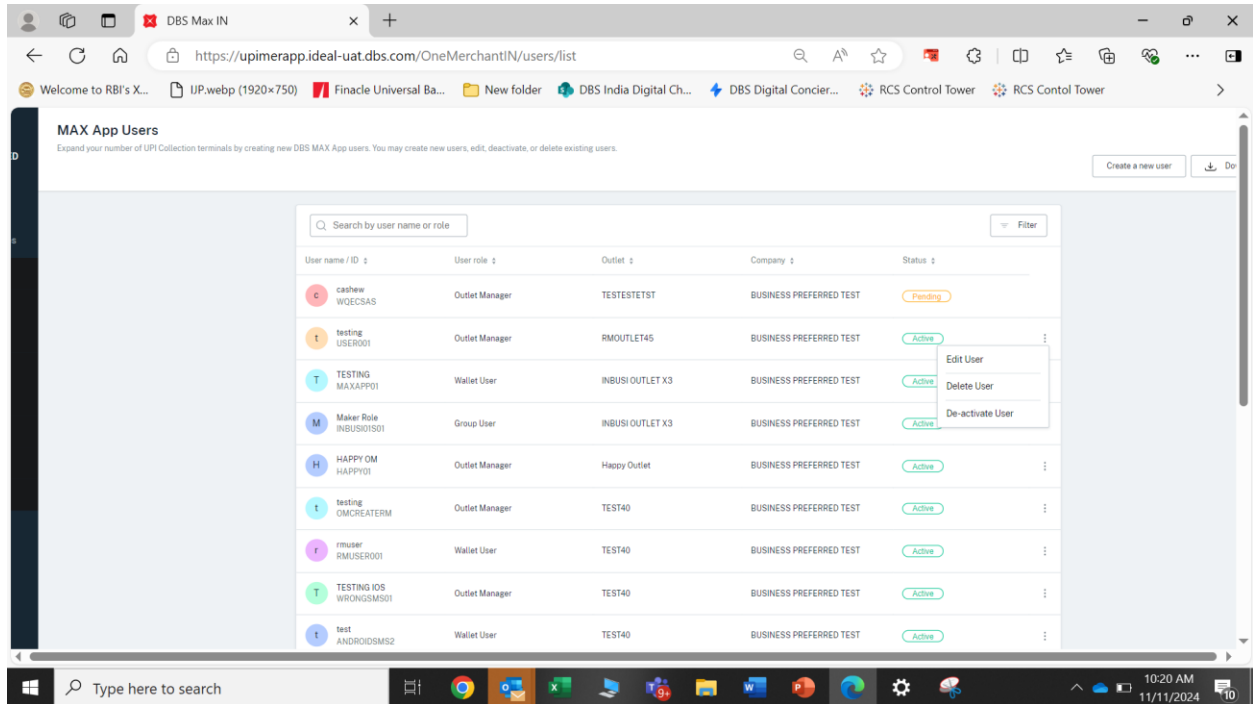
Role of the user	What they can perform
Wallet User	<p>What can this user do?</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Collect payment on DBS MAX App <input type="checkbox"/> Perform refunds on DBS MAX App
Outlet Manager	<p>What can this user do?</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Create / Modify outlet managers and wallet users on Merchant Portal <input checked="" type="checkbox"/> Collect payment on DBS MAX App <input type="checkbox"/> Perform refunds on DBS MAX App <input type="checkbox"/> Receive End-of-Day Transaction Reports via email
Group user	<p>What can this user do?</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Create / Modify outlet managers and wallet users on Merchant Portal <input checked="" type="checkbox"/> Create outlets on Merchant Portal <input checked="" type="checkbox"/> Collect payment on DBS MAX App <input checked="" type="checkbox"/> Perform refunds on DBS MAX App <input type="checkbox"/> Receive End-of-Day Transaction Reports via email

The creation of user will follow make / checker flow and user having self-approve access need not follow maker / checker flow.


Post new user approval, the user will receive email requesting to download DBS MAX app and use OTRC to access app


Edit User

By clicking, on the 3 dots the Group user can edit access given to Outlet manager /
Wallet User



MAX App Users
Expand your number of UPI Collection terminals by creating new DBS MAX App users. You may create new users, edit, deactivate, or delete existing users.

Create a new user  Do

Search by user name or role 

User name / ID	User role	Outlet	Company	Status
cashew WOECSAS	Outlet Manager	TESTESTST	BUSINESS PREFERRED TEST	Pending
testing USER001	Outlet Manager	RMOUTLET45	BUSINESS PREFERRED TEST	Active
TESTING MAXAPP01	Wallet User	INBUSI OUTLET X3	BUSINESS PREFERRED TEST	Active
Maker Role INBUSI01S01	Group User	INBUSI OUTLET X3	BUSINESS PREFERRED TEST	Active
HAPPY OM HAPPY01	Outlet Manager	Happy Outlet	BUSINESS PREFERRED TEST	Active
testing OMCREATERM	Outlet Manager	TEST40	BUSINESS PREFERRED TEST	Active
rmuser RMUSER001	Wallet User	TEST40	BUSINESS PREFERRED TEST	Active
TESTING IOS WRONGSM01	Outlet Manager	TEST40	BUSINESS PREFERRED TEST	Active
test ANDROIDSM2	Wallet User	TEST40	BUSINESS PREFERRED TEST	Active

10:20 AM 11/11/2024