

NPCI/2024-25/RuPay/025

January 30, 2025

To,

All members banks

Sub: Introduction of CRM Invoice Retrieval through National Archival Service (NAS)

NPCI has launched a functionality within the existing CRM portal (<https://www.npcisupport.org.in/portal/en/home>) for retrieval of existing invoices that are issued by NPCI to the member banks. The feature will provide the following benefits

- 24x7 platform availability for retrieval.
- Existing bank users on CRM can access their invoices in a simplified manner
- Automated fetching of invoices.

Usage instructions:

Member banks are advised to follow the attached user manual to access the invoices from NPCI Support portal. If there is any discrepancy related to this matter, we highly recommend the member banks to raise a CRM ticket in the respective product.

Please refer Annexure-I for steps to retrieve the invoices.

Important information for banks:

1. We have currently made available the following invoices:
 - a. Switching fee invoices
 - b. Credit notes of switching fees
 - c. NRP fee invoices
 - d. Certification fee invoices
2. The aforesaid invoices are available from the period of April-2024 to December-2024 for the following products:
 - i) UPI
 - ii) AEPS
 - iii) IMPS
 - iv) RUPY (Rupay Domestic)
 - v) RUPI (Rupay International)
 - vi) NFS
 - vii) ICD
 - viii) NETC
 - ix) CERT (Certification)

Member banks are advised to take a note of the above and disseminate the instructions contained herein to all the stakeholders concerned. If you need any further information, you may please contact your respective customer success / CCU relationship manager.

With warm regards

-/Sd

Giridhar G M

Chief - Customer success

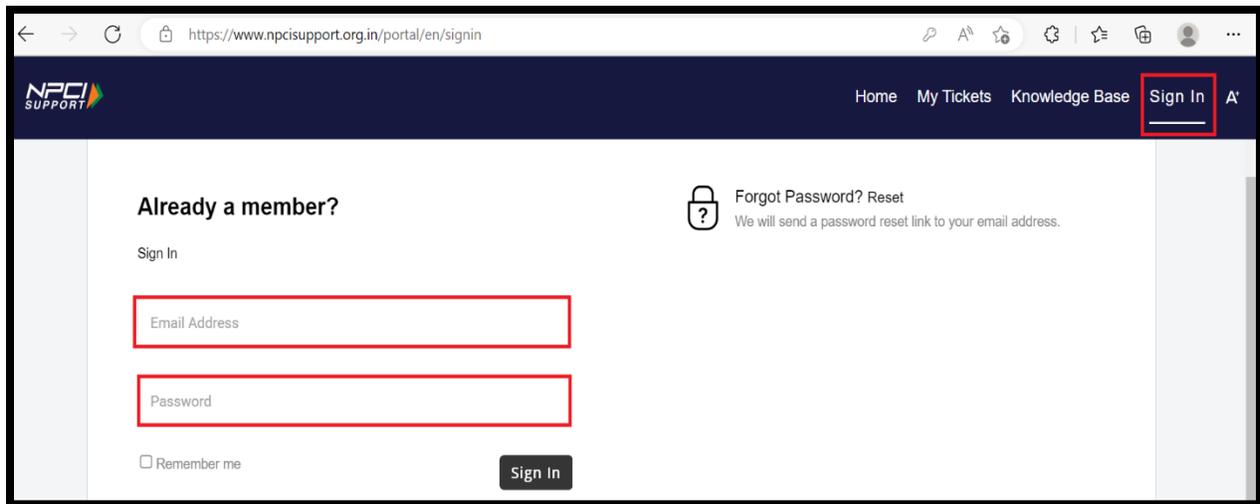
Annexure-I



User Guide For Invoice Retrieval

Sign-In to Help Centre Portal

- Visit: <https://www.npcisupport.org.in/portal/en/home>
- Enter your email address and password and click on “**Sign In**” button.
- Users can use the Forgot Password option to reset the password.

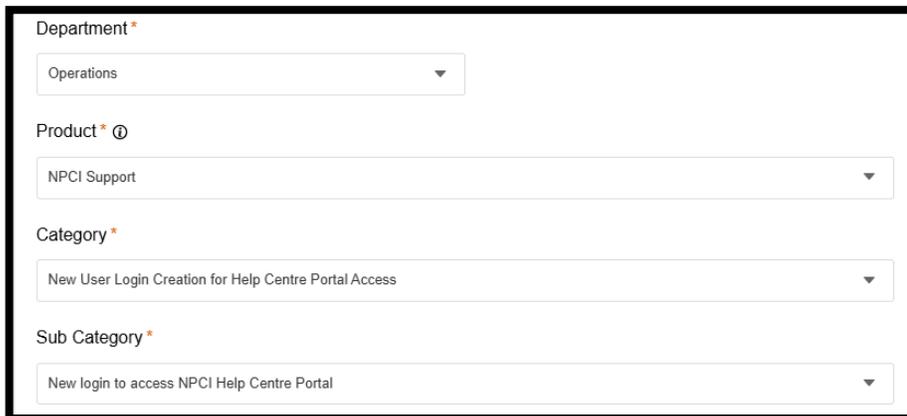


The screenshot shows the sign-in page of the NPCI Support Portal. The URL in the browser is <https://www.npcisupport.org.in/portal/en/signin>. The page features a dark blue navigation bar with the NPCI Support logo on the left and links for 'Home', 'My Tickets', 'Knowledge Base', and 'Sign In' on the right. The 'Sign In' link is highlighted with a red box. Below the navigation bar, the main content area is white. On the left, it says 'Already a member?' and 'Sign In'. There are two input fields: 'Email Address' and 'Password', both highlighted with red boxes. Below these fields is a 'Remember me' checkbox and a 'Sign In' button. On the right, there is a 'Forgot Password? Reset' link with a lock icon and a sub-link that says 'We will send a password reset link to your email address.'

There are two ways to get a registration link.

- 1- Existing portal user can raise a new user access request through help center portal add ticket option.

Path: Existing User Login->Click on Add Ticket button under My tickets section -> Select Operations department -> Select NPCI Support product ->Select New user creation request category -> Select Login creation sub category and enter required details and Click on submit button.

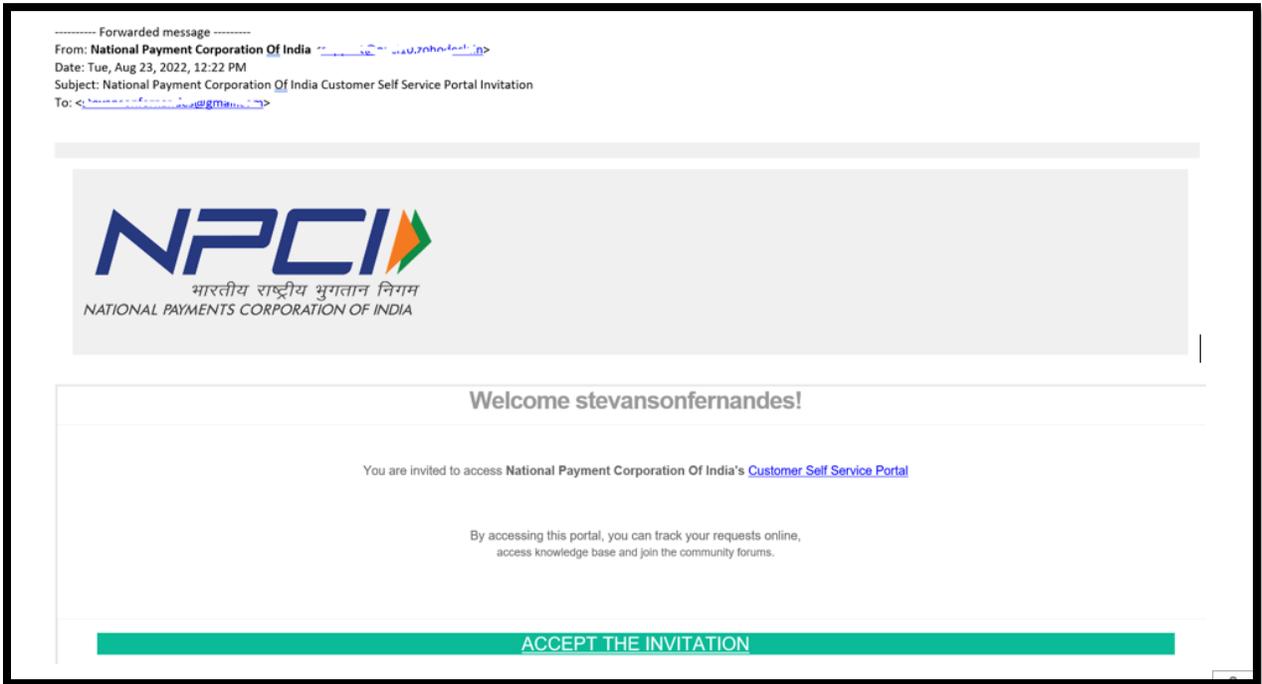


The screenshot shows a form for creating a ticket. It has four dropdown menus:

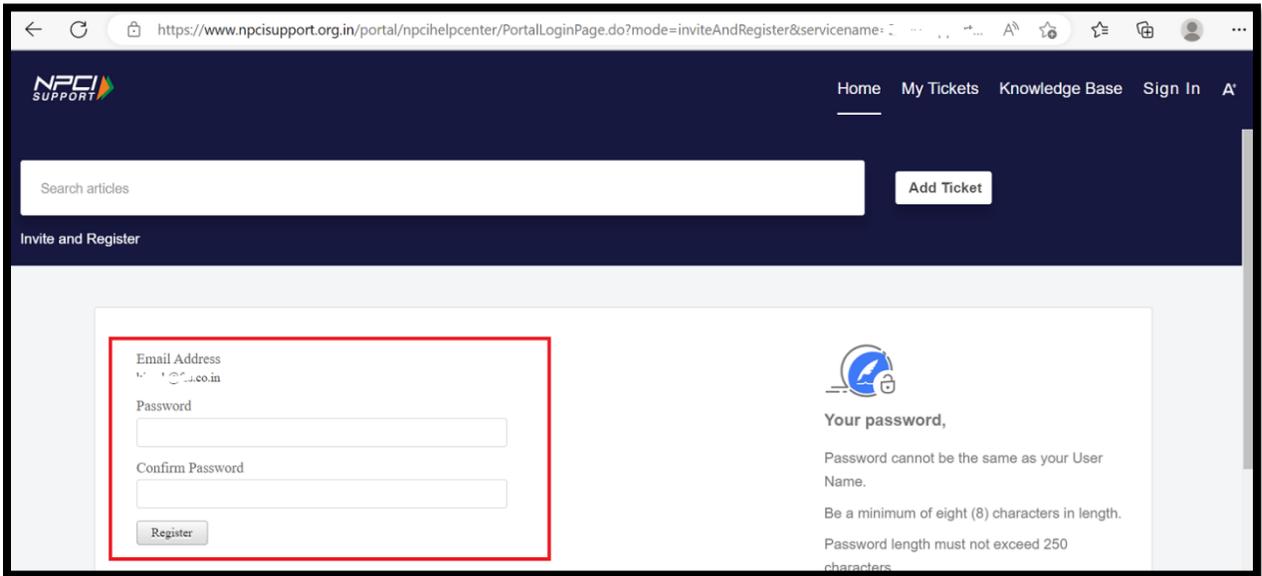
- Department *: Operations
- Product * @: NPCI Support
- Category *: New User Login Creation for Help Centre Portal Access
- Sub Category *: New login to access NPCI Help Centre Portal

- 2- User may connect with respective RM to get the registration link.

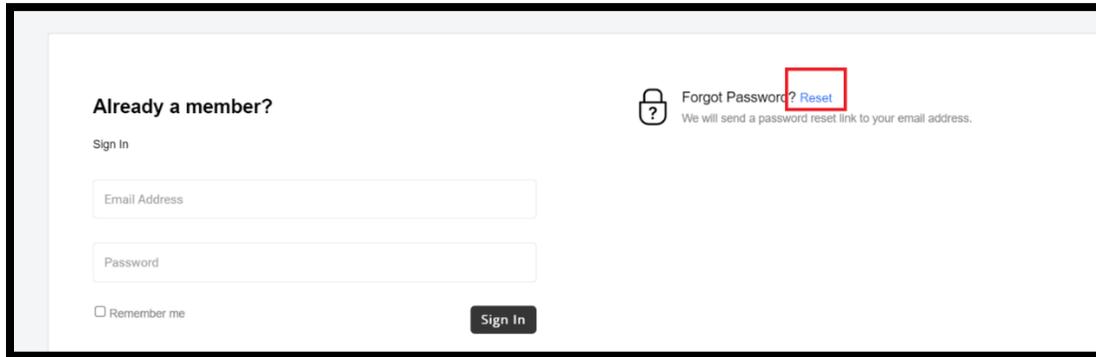
End user will receive an email from contact.us@npcisupport.org.in for sign up. Click on Accept the invitation link and create your account.



Set the password for help centre portal and click on **“Register”** button:



Reset Password : Also exiting user can change their password using reset password button



The image shows a login interface. On the left, there is a section titled "Already a member?" with a "Sign In" label. Below this are two input fields: "Email Address" and "Password". There is also a checkbox labeled "Remember me" and a "Sign In" button. On the right side, there is a "Forgot Password?" link with a question mark icon, and a "Reset" link highlighted with a red box. Below the "Forgot Password?" link, it says "We will send a password reset link to your email address."

Guideline for Invoice Retrieval from CRM

To ensure a smooth and accurate process for retrieving invoices from the CRM system, please follow the steps below:

1. Select the Date Range - Use the date filter to specify the desired period.

Important: The selected date range should not exceed 15 days. If you require invoices beyond this period, perform multiple searches.

2. Enter the Correct Amount Range- Input the exact invoice amount range in the provided field. Ensure that the amount matches the records provided. (Make sure to enter the amount in decimal point only, for example, if you are trying to retrieve invoice for Rs. 152, then enter amount range as 150.00 to 160.00)

3. Select the Correct Product Code – Select the correct product code from the dropdown.

4. Enter Other Details (Optional) – Enter Invoice Number, UTR Number to narrow down the search results effectively

5. Submit & Retrieve– Click on Submit button to retrieve the invoices matching your criteria.

6. Download - Once you have identified the correct invoice, use the Download option to save a copy for your records.

7. For Assistance

If you encounter any issues or need further help, please contact the Support Team. Provide details such as the date range and invoice amount for faster resolution.

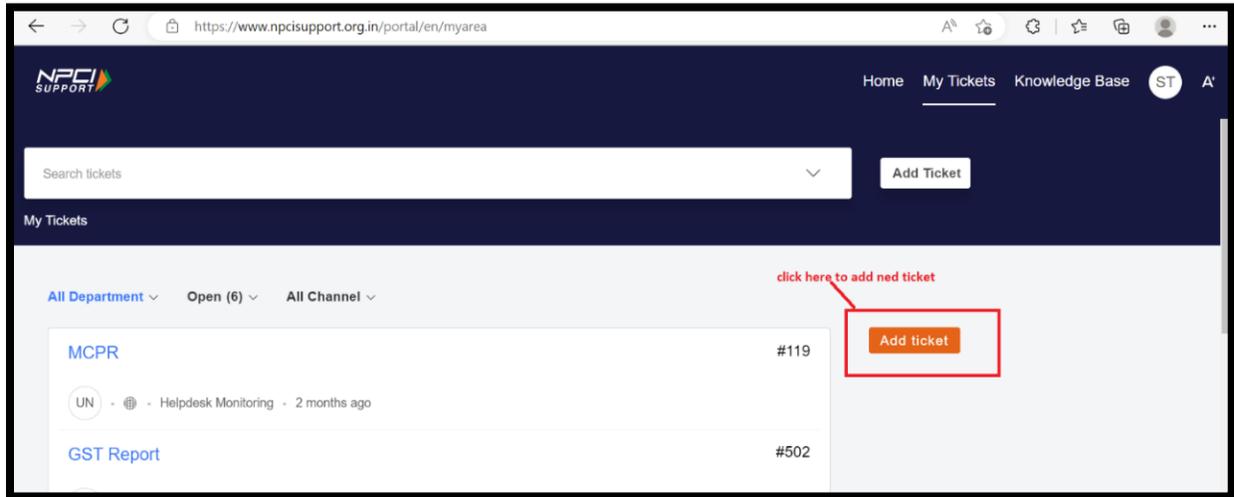
Note: Accuracy in entering the date range and amount will ensure quick and reliable retrieval of your invoices. So, try to narrow down your search parameters as much as possible.

Please note that at one time only a single invoice can be fetched.

Create Ticket to Generate the Invoice

Use below path to Raise a request for Invoice

Click on My Ticket Menu - > Click on Add Ticket Button



Submit a ticket

Ticket Information

Department *

Operations

Product * ⓘ

Invoice Retrieval

Category *

Invoice Retrieval

Sub Category *

Invoices / Credit Notes

Subject *

Invoice Related

Description *

- Select the Department - **Operations** and Product – **Invoice Retrieval**.
- Once the product is selected, system will automatically populate the Category and Sub-category from the drop-down option (**auto populated fields depending upon product / category selection**).
- Also, add a subject for the query. You can also add a description for the query.
- **Enter the Following details to Get the Correct Invoice file. Please make sure data entered by you is correct.**

Invoice Retrieval

Select 15 Days Date Range Only

Invoice Date FROM * ⓘ
01 Dec 2024

Invoice Date TO *
15 Dec 2024

Invoice Amount FROM *
Amount in Rupees and Paise
56982

Invoice Amount TO *
Amount in Rupees and Paise
60000

Invoice_Number
RuPD/04-24/0604

UTR Number
Enter the Invoice UTRN

Product Code

Once the details are entered correctly, click on submit button. After submission system will create one request in CRM to fetch the invoice details.

Kindly referesh your screen to Get the Invoice file.

Invoice required

27 Jan 2025 02:43 AM Reply Comment

SF · Stevanson Fernandes · 11 hours ago · 📎

Document retrieved successfully, please find the attachment here:

BEB_Cr Note_O... 130 KB Download

SF · stevanson fernandes · 11 hours ago · 🌐

Invoice

< Previous Next >

Ticket Properties

Ticket Id
#66271

Created On
27 Jan 2025 02:43 AM

Status
Open

Due On
29 Jan 2025 04:00 PM

Channel
Help Center

Ticket Information

Department
Operations

Old Invoice:

Old invoices can be downloaded in CRM by using below path. No need to raise the new request.

Click on My Tickets section - > Open the Ticket - > Click on Download link to get the file.

All Department ▾ All Channel ▾

Invoice required #66271 Open

UN · 🌐 · Operations · 11 hours ago

inv #66270 Open

UN · 🌐 · Operations · 11 hours ago

Invoice Required #66269 Open

UN · 🌐 · Operations · 11 hours ago

Need Invoice #65620 Open

UN · 🌐 · Operations · 3 days ago

Views

- My Tickets
- My Open Tickets
- My Closed Tickets
- My On Hold Tickets
- My Overdue Tickets
- Team Tickets
- Team Open Tickets
- Team Closed Tickets
- Team On Hold Tickets
- Team Overdue Tickets

Add ticket

Invoice required

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