

## **Online Payment, Integration & Bank Reconciliation Registration Process of AXIS in Marg ERP Software**

- [Introduction to Integration of Marg ERP & AXIS Bank](#)
- [Benefits of Integration of Marg ERP & AXIS Bank \(Customers\)](#)
- [Process of AXIS Registration in Marg ERP Software](#)
- [Process of Online Payment in Marg ERP Software](#)
- [Process of AXIS Bank Reconciliation in Marg ERP Software](#)
- [Process to view Online Statement in Marg ERP Software](#)

### **INTRODUCTION TO INTEGRATION OF MARG ERP & AXIS BANK**

- Marg ERP; a leading software application provider in GST has introduced a faster and easier Payment Reconciliation in order to help simplify and ease the banking transactions.
- A seamless integration of Marg ERP & AXIS Bank will help to easily manage the bank transactions i.e. IMPS, NEFT, RTGS, Same Bank Transfer.

### **BENEFITS OF INTEGRATION OF MARG ERP & AXIS BANK (CUSTOMERS)**

- Get Paid Faster for your invoices
- Offer customer multiple payment methods
- Easy Salary disbursement/ Easy Expense disbursement
- Create Flexible Payment Schedule for vendors, expenses
- Centralized Account Management

### **PROCESS OF AXIS REGISTRATION IN MARG ERP SOFTWARE**

1. Go to Digital> Registration >connected banking> >>AXIS Bank

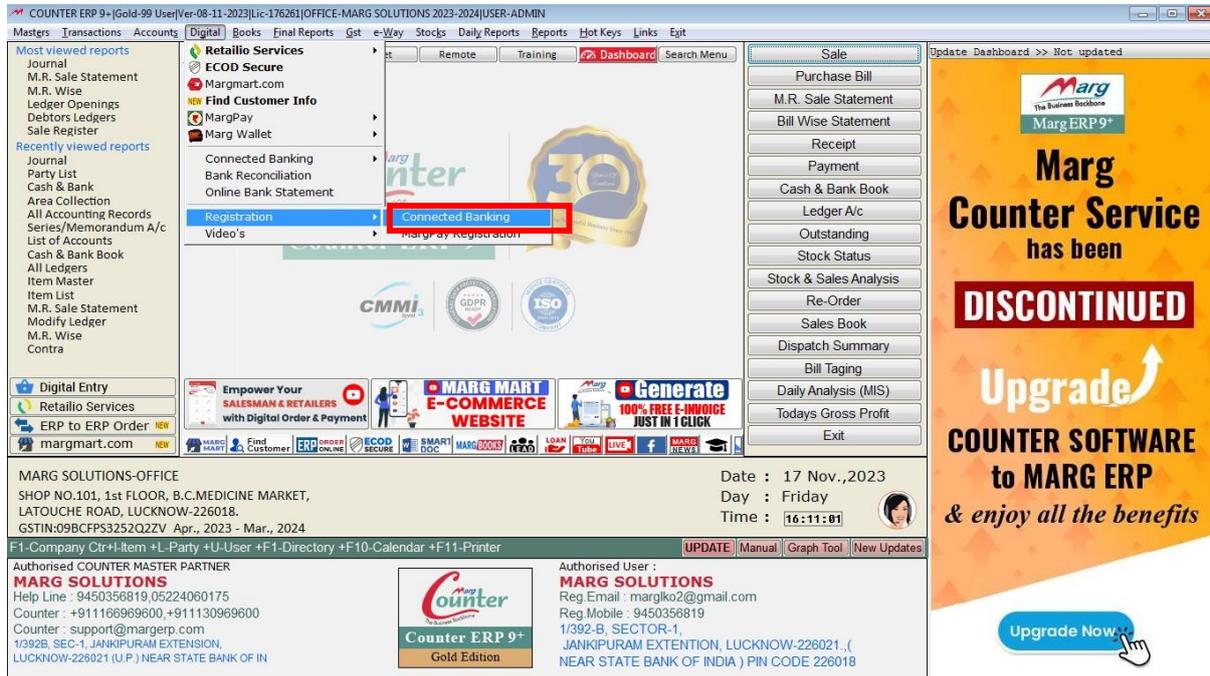
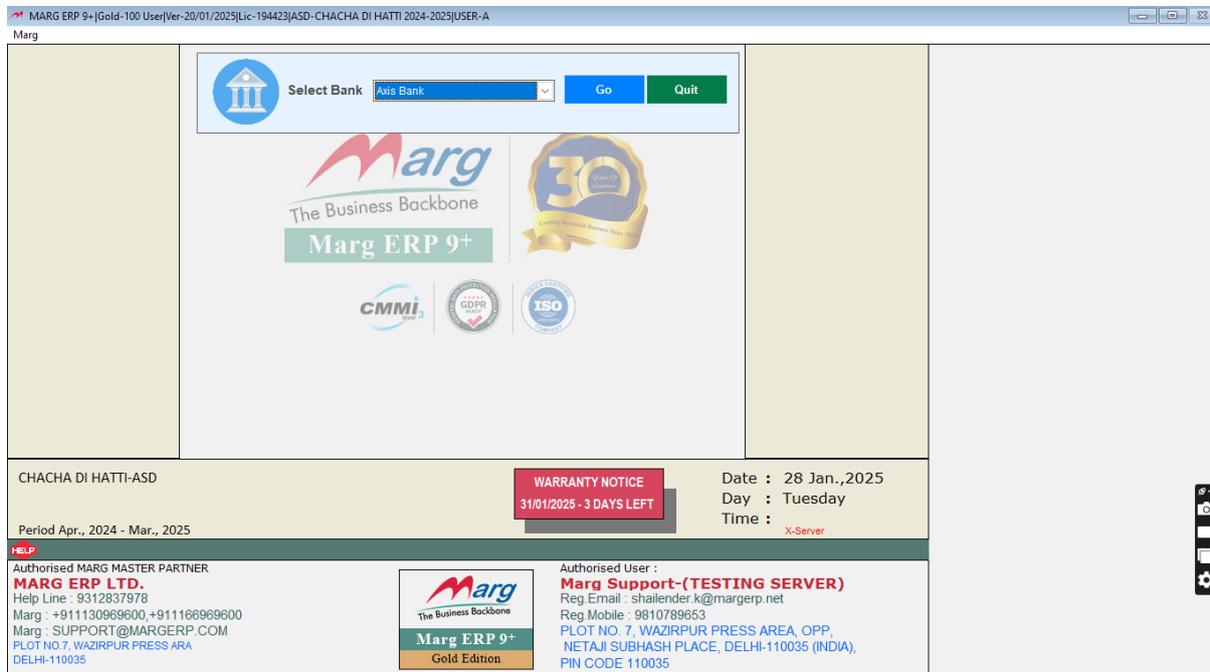


Fig. 1.1 Bank list will be available here user have to select AXIS Bank

1. Select AXIS Bank from Dropdown list



- A window of “Admin/Supervisor Detail” will be displayed in which the user will fill the details for security of the owner’s data/protect the data so that it doesn’t get misused.

Marg

**ADMIN/SUPERVISOR DETAILS**

ADMIN / SUPERVISOR DETAILS

Licence No. :  Branch Name :

Company UID :

Contact Person :

Regd E-mail :

Regd Mobile :

Show Values

BANK PAYMENT-BAPA

Date : 23 May.,2018  
Day : Wednesday [.]  
Time :

Financial Period : Apr., 2018 - Mar., 2019

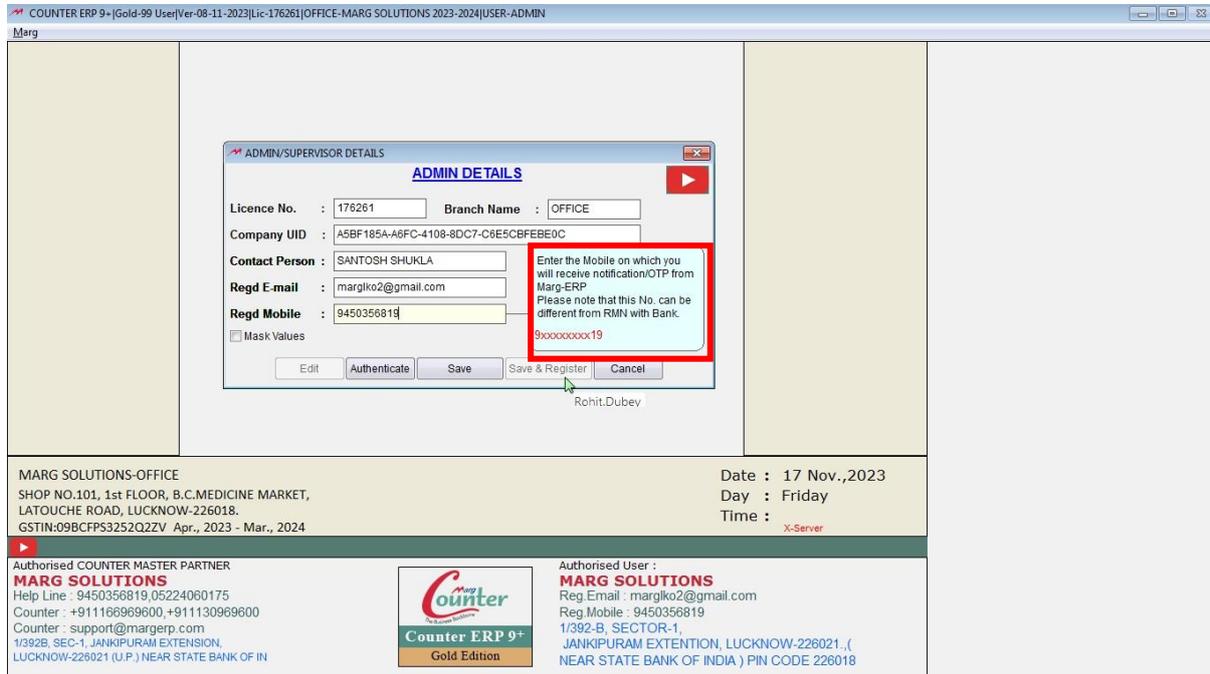
**Fig. 1.2 View of Admin/Supervisor Details Window in Marg ERP Software**



*It is mandatory to fill the details as if someone takes the backup of the data and then restores it somewhere else or copy Marg Folder then with the help of this option the data will not get misused.*

*Any kind of operations related to AXIS will not get executed so if any unknown user/authorized person visits to AXIS Registration then the information will be sent to the Admin/Supervisor in form of an OTP.*

- In order to fill this window the user will click on “Edit” and then click on “Save & Register” once the details are being filled.



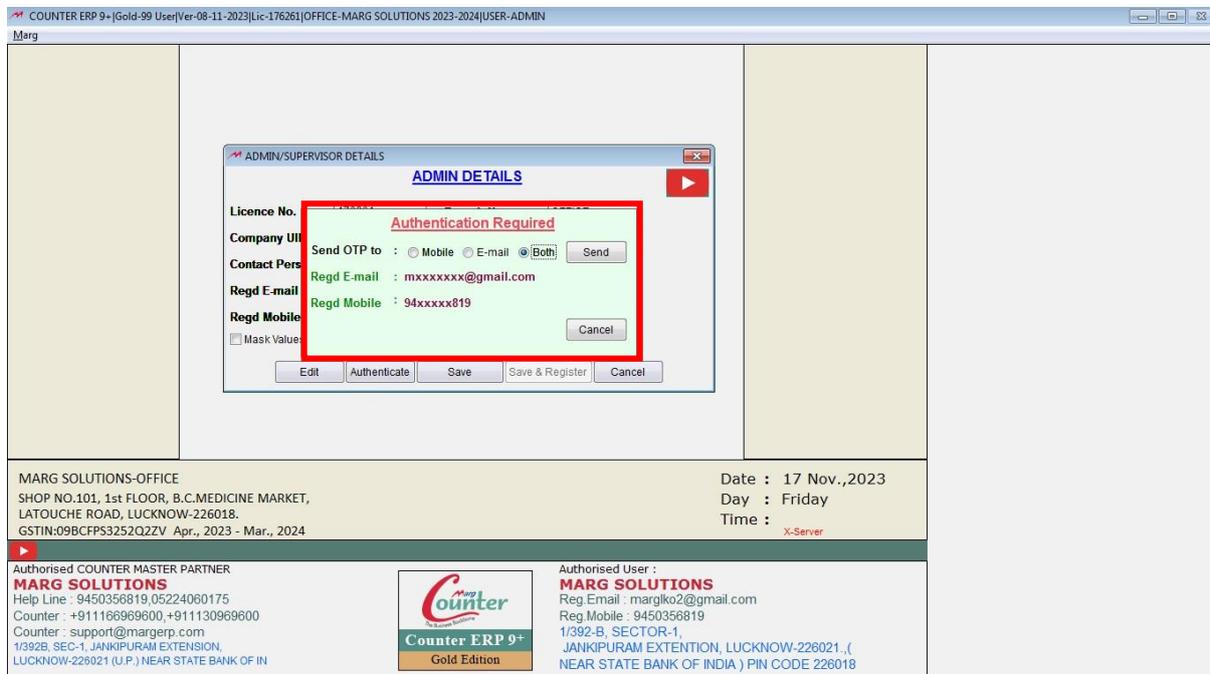
The screenshot shows the 'ADMIN/SUPERVISOR DETAILS' window in Marg ERP 9+. The 'ADMIN DETAILS' section contains the following fields:

- Licence No. : 176261
- Branch Name : OFFICE
- Company UID : A5BF185A-A6FC-4108-8DC7-C8E5CBFE8E0C
- Contact Person : SANTOSH SHUKLA
- Regd E-mail : margiko2@gmail.com
- Regd Mobile : 9450356819

A red box highlights the 'Regd Mobile' field with a tooltip that reads: "Enter the Mobile on which you will receive notification/OTP from Marg-ERP. Please note that this No. can be different from RMN with Bank." Below the fields are buttons for 'Edit', 'Authenticate', 'Save', 'Save & Register', and 'Cancel'. The 'Save & Register' button is highlighted with a mouse cursor.

At the bottom of the window, there is a footer section containing company information, date (17 Nov., 2023), day (Friday), time, and server status (X-Server).

**Fig. 1.3 Process to Fill the Admin/Supervisor Details in Marg ERP Software and click on Authenticate**



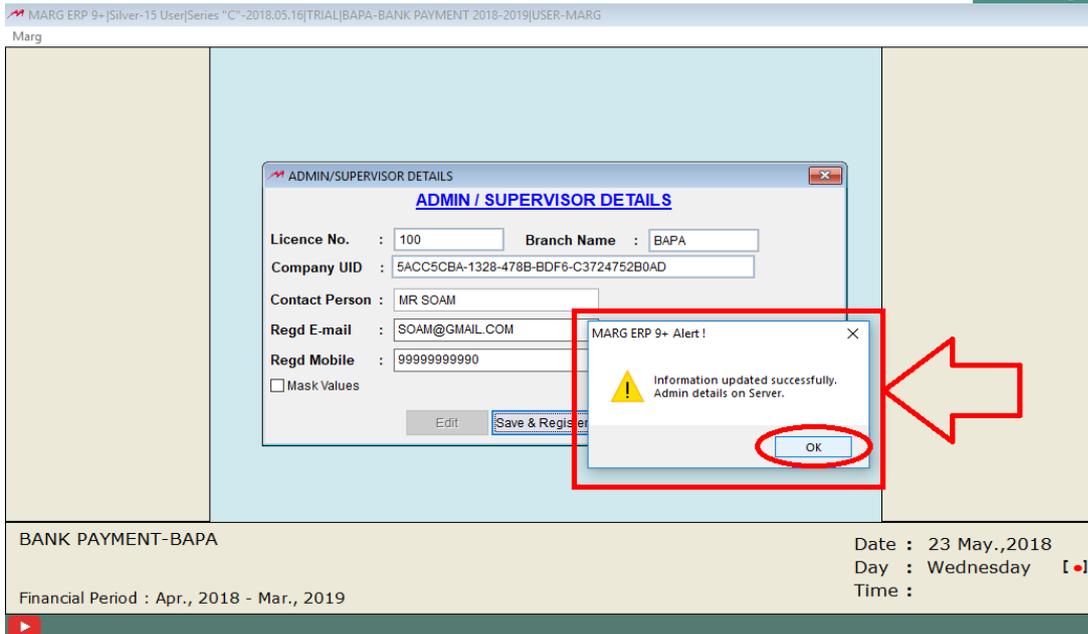
The screenshot shows the 'ADMIN/SUPERVISOR DETAILS' window in Marg ERP 9+ with an 'Authentication Required' dialog box overlaid. The dialog box contains the following fields:

- Send OTP to :  Mobile  E-mail  Both
- Regd E-mail : mxxxxxxx@gmail.com
- Regd Mobile : 94xxxxx819

A red box highlights the 'Authentication Required' dialog box. Below the fields are buttons for 'Edit', 'Authenticate', 'Save', 'Save & Register', and 'Cancel'. The 'Authenticate' button is highlighted with a mouse cursor.

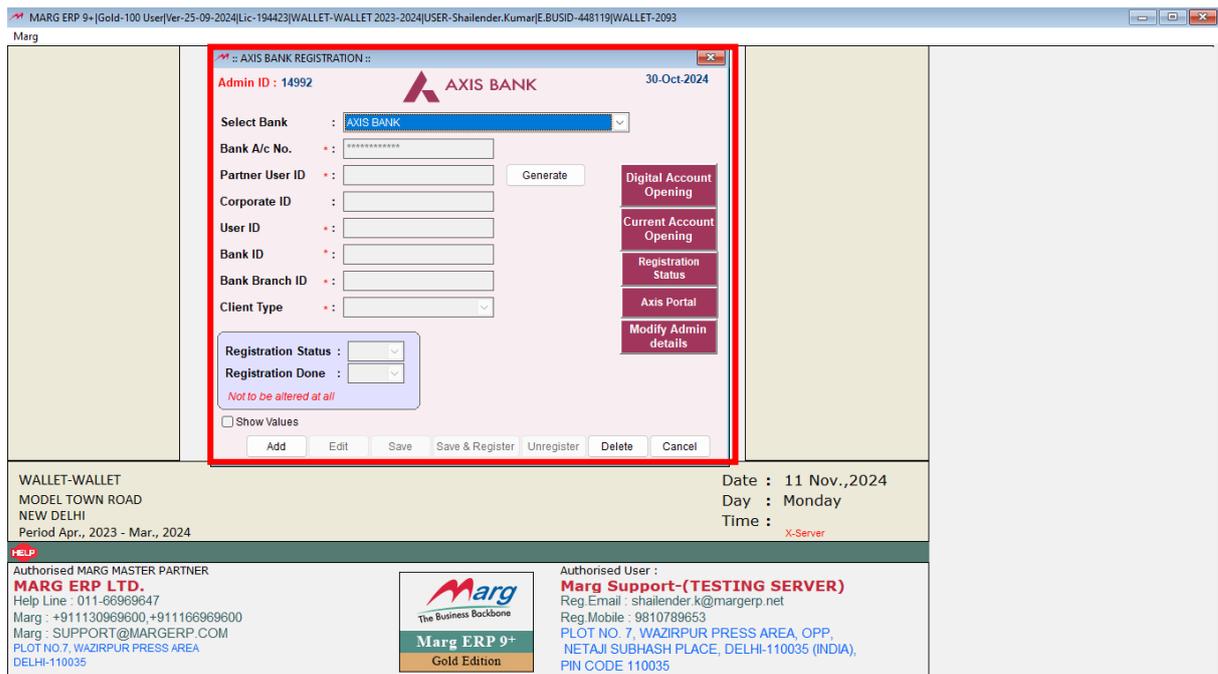
The background window shows the same 'ADMIN DETAILS' section as in the previous screenshot, with the 'Save & Register' button highlighted.

- A window of “Authenticate is visible. Select both and send OTP>>Click “SEND”.

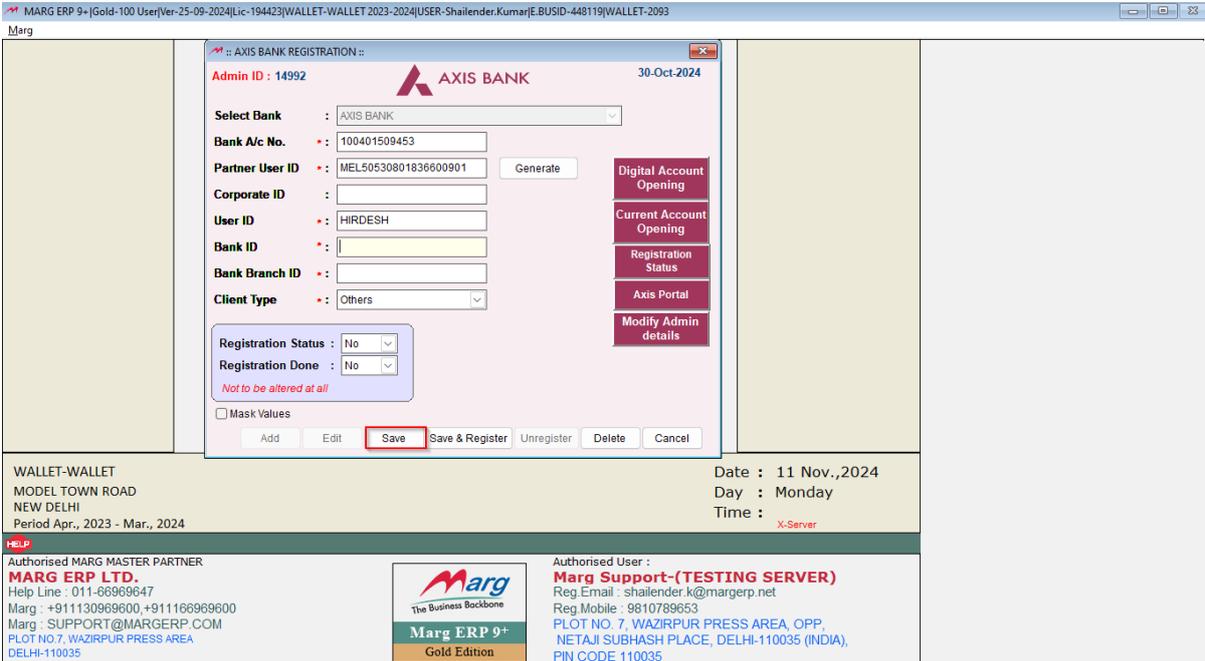


**Fig. 1.4 View of Information Updated Successfully in Marg ERP Software**

- Now, **AXIS Registration window will get displayed**. As the user is registering for the first time; click on **"Add"**.
- **Select AXIS Bank**: All the Bank accounts which exists in the organization will get displayed. **Select the bank account which needs to be registered>>Click on "OK"**.
- **AXIS Bank A/c No.:** Enter the Account No. If it exists in the ledger then it will be picked by Marg Software automatically. **The user can click "Show Values" in order to view the values.**



- Users need to enter their **User ID**. Then, simply click the 'Save' button.
- If the user is a corporate id needs to fill in his **corporate ID**



MARG ERP 9+ [Gold-100 User|Ver-25-09-2024|Lic-194423|WALLET-WALLET 2023-2024|USER-Shailender.Kumar|E.BUSID-448119|WALLET-2093]

Admin ID : 14992      30-Oct-2024

**AXIS BANK**

Select Bank : AXIS BANK

Bank A/c No. : 100401509453

Partner User ID : MEL50530801836600901      Generate

Corporate ID :

User ID : HIRDESH

Bank ID :

Bank Branch ID :

Client Type : Others

Registration Status : No

Registration Done : No

*Not to be altered at all*

Mask Values

Add   Edit   **Save**   Save & Register   Unregister   Delete   Cancel

WALLET-WALLET  
MODEL TOWN ROAD  
NEW DELHI  
Period Apr., 2023 - Mar., 2024

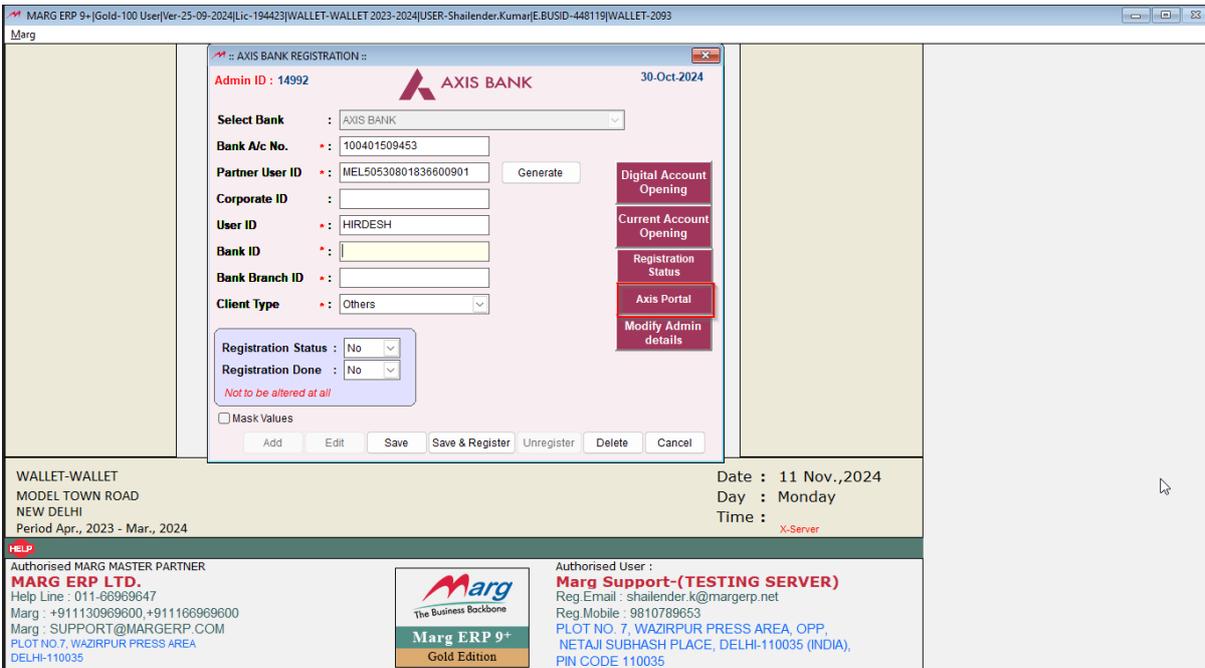
Date : 11 Nov., 2024  
Day : Monday  
Time : X-Server

HELP  
Authorised MARG MASTER PARTNER  
**MARG ERP LTD.**  
Help Line : 011-86969647  
Marg : +911130969600,+911166969600  
Marg : SUPPORT@MARGERP.COM  
PLOT NO.7, WAZIRPUR PRESS AREA  
DELHI-110035



Authorised User :  
**Marg Support-(TESTING SERVER)**  
Reg.Email : shailender.k@margerp.net  
Reg.Mobile : 9810789653  
PLOT NO. 7, WAZIRPUR PRESS AREA, OPP,  
NETAJI SUBHASH PLACE, DELHI-110035 (INDIA),  
PIN CODE 110035

- After clicking on the **Axis Portal** link, it should redirect to the **authorized permission** screen.



MARG ERP 9+ [Gold-100 User|Ver-25-09-2024|Lic-194423|WALLET-WALLET 2023-2024|USER-Shailender.Kumar|E.BUSID-448119|WALLET-2093]

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Select Bank : AXIS BANK

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Bank ID :

Bank Branch ID :

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NEW DELHI  
Period Apr., 2023 - Mar., 2024

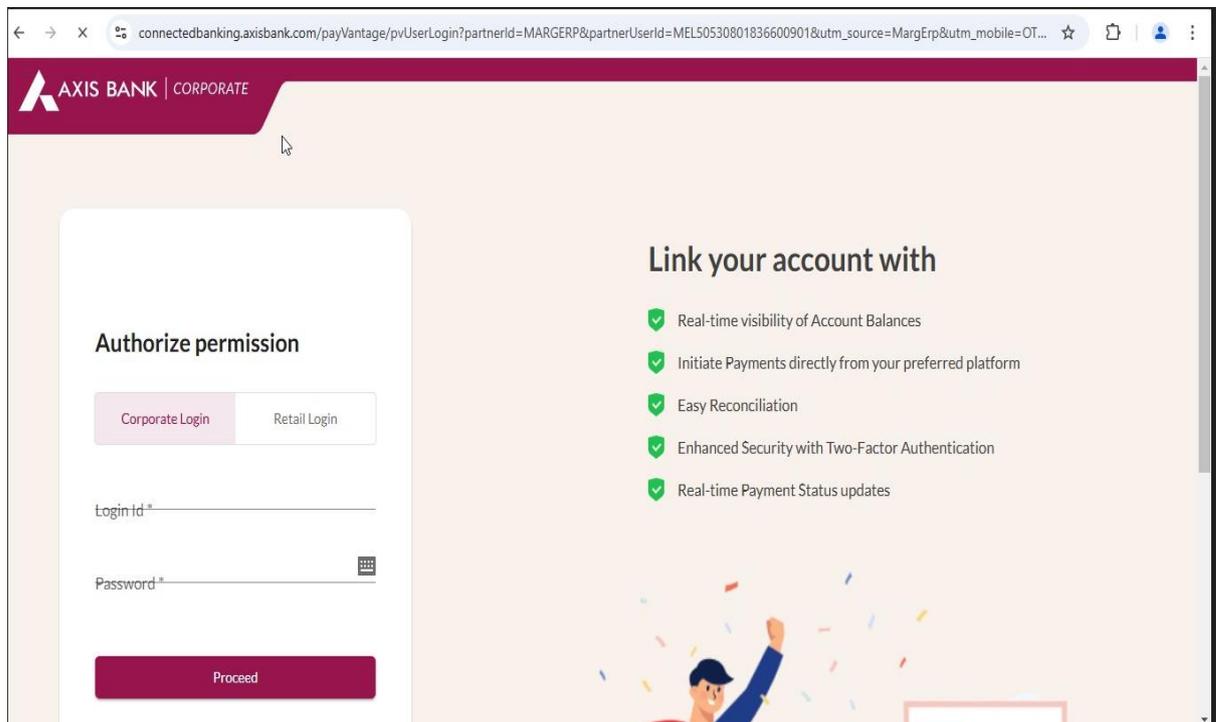
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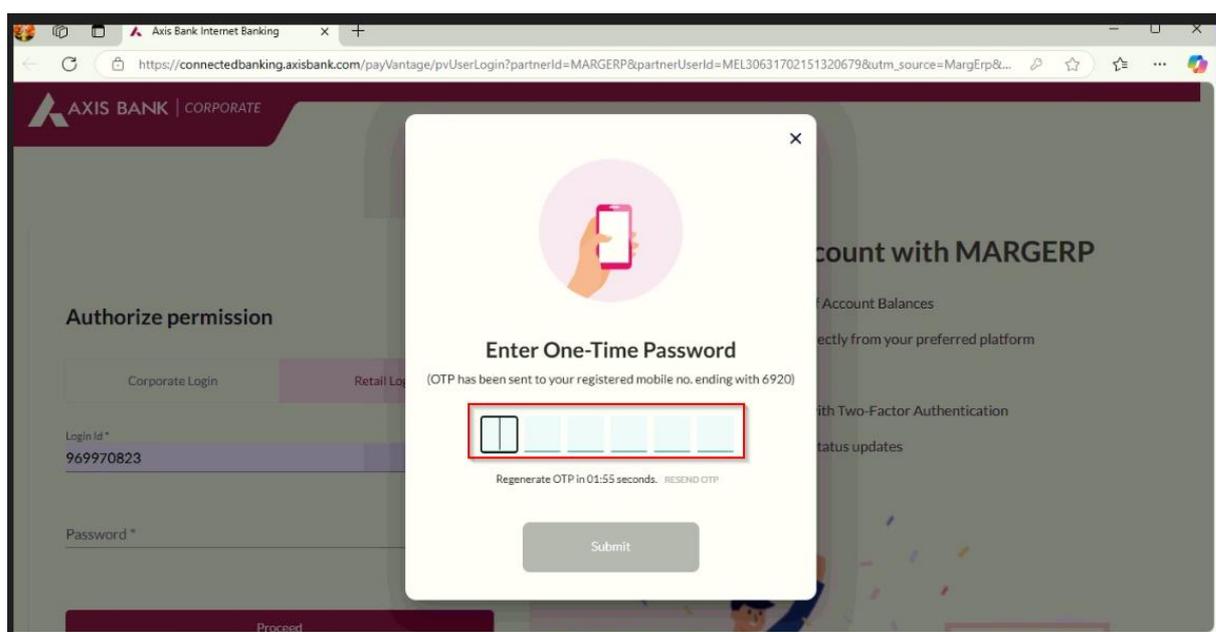
Authorised User :  
**Marg Support-(TESTING SERVER)**  
Reg.Email : shailender.k@margerp.net  
Reg.Mobile : 9810789653  
PLOT NO. 7, WAZIRPUR PRESS AREA, OPP,  
NETAJI SUBHASH PLACE, DELHI-110035 (INDIA),  
PIN CODE 110035

- If the user is corporate, select the **Corporate Login** tab. Otherwise, click on **Retail tab**
- Now, enter valid credentials and click on the **Proceed** button.



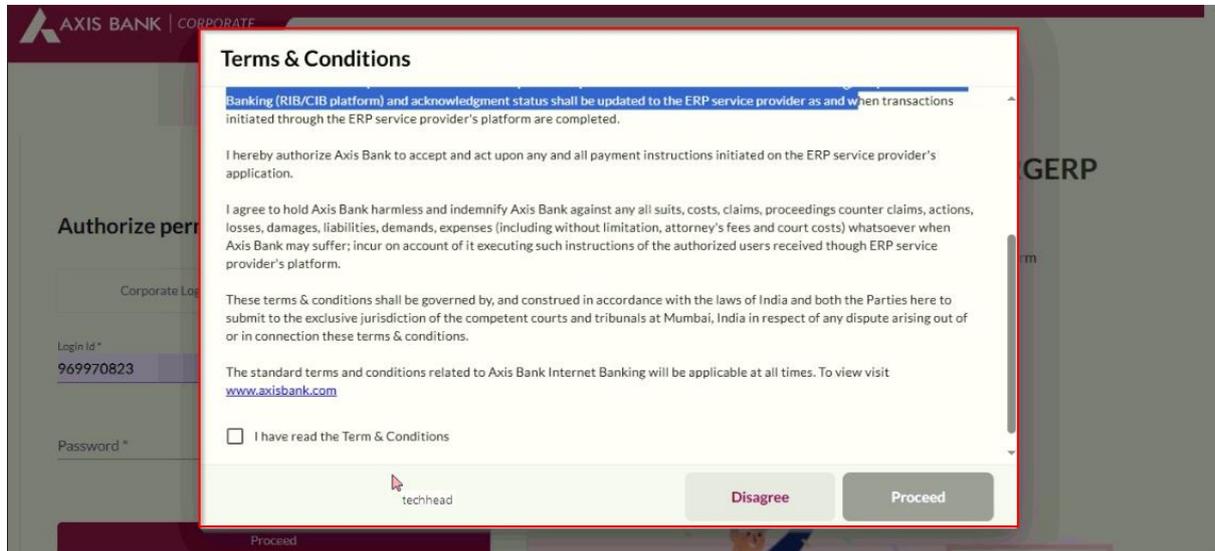
The screenshot shows the Axis Bank Corporate Login page. The header includes the Axis Bank logo and 'CORPORATE' text. The main content area is titled 'Authorize permission' and features two tabs: 'Corporate Login' (selected) and 'Retail Login'. Below the tabs are input fields for 'Login Id \*' and 'Password \*', followed by a 'Proceed' button. To the right, there is a section titled 'Link your account with' with a list of benefits: Real-time visibility of Account Balances, Initiate Payments directly from your preferred platform, Easy Reconciliation, Enhanced Security with Two-Factor Authentication, and Real-time Payment Status updates. An illustration of a person celebrating is visible at the bottom right.

- After clicking the Proceed button, the **OTP** window will appear.
- Now, enter the 6-digit OTP in the OTP field. After entering the OTP, the Submit button will be enabled.

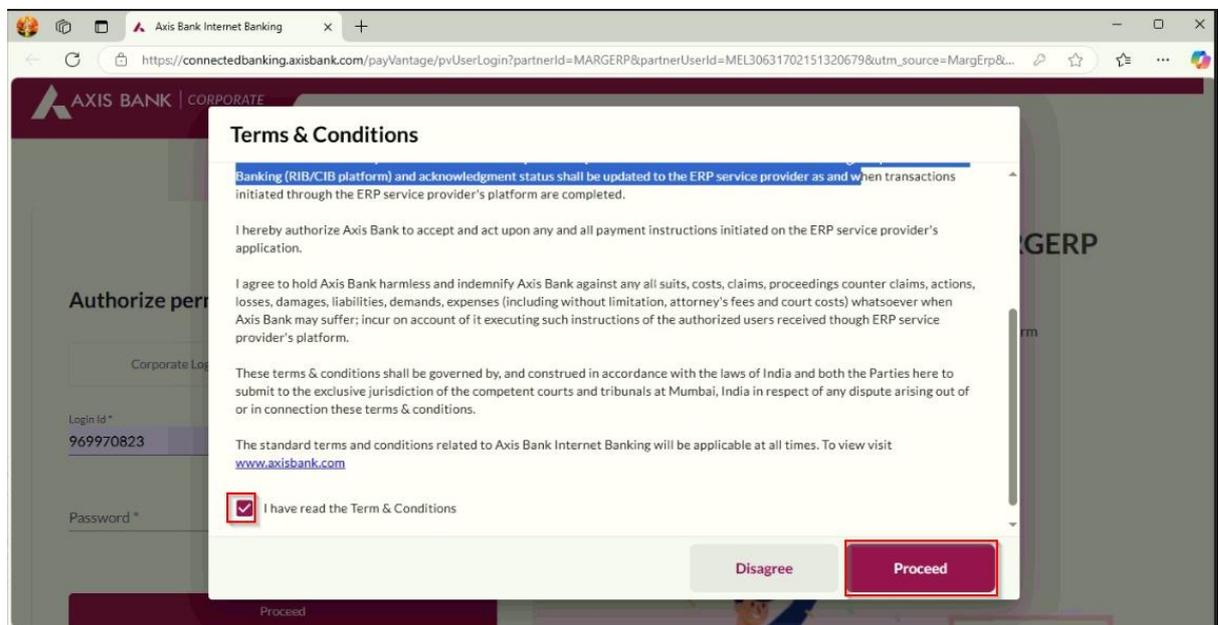


The screenshot shows the Axis Bank OTP verification window. The window is titled 'Enter One-Time Password' and includes a sub-header '(OTP has been sent to your registered mobile no. ending with 6920)'. Below this is a 6-digit OTP input field with a red border. A 'Submit' button is located at the bottom of the window. The background shows the 'Authorize permission' page with the 'Retail Login' tab selected and the 'Login Id \*' field containing the value '969970823'. The 'Proceed' button is visible at the bottom of the background page.

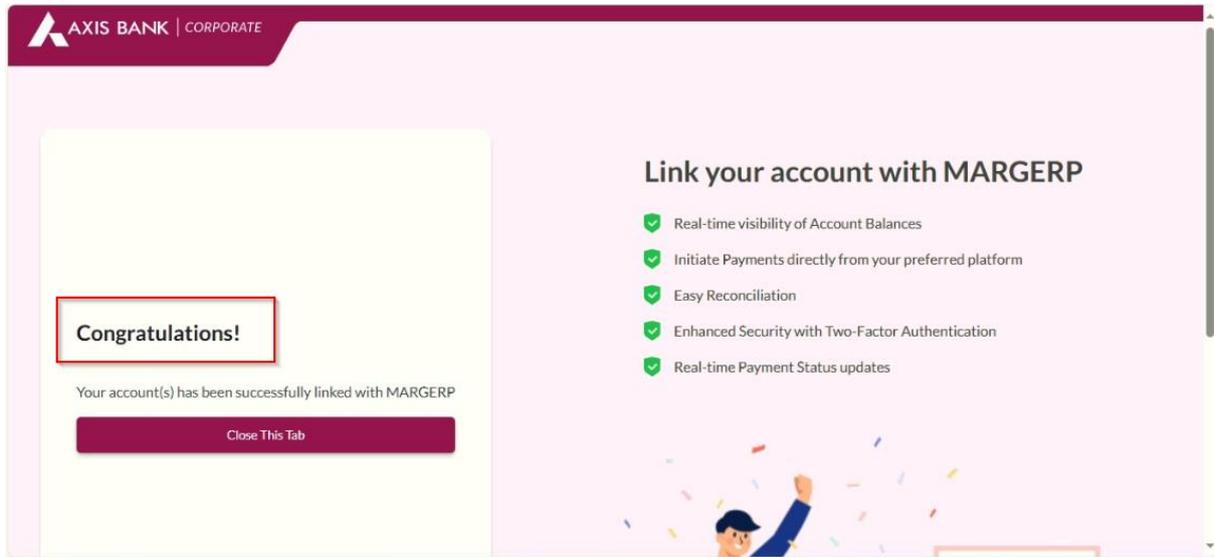
- After clicking the Submit button, the **Terms & Conditions** window will appear.



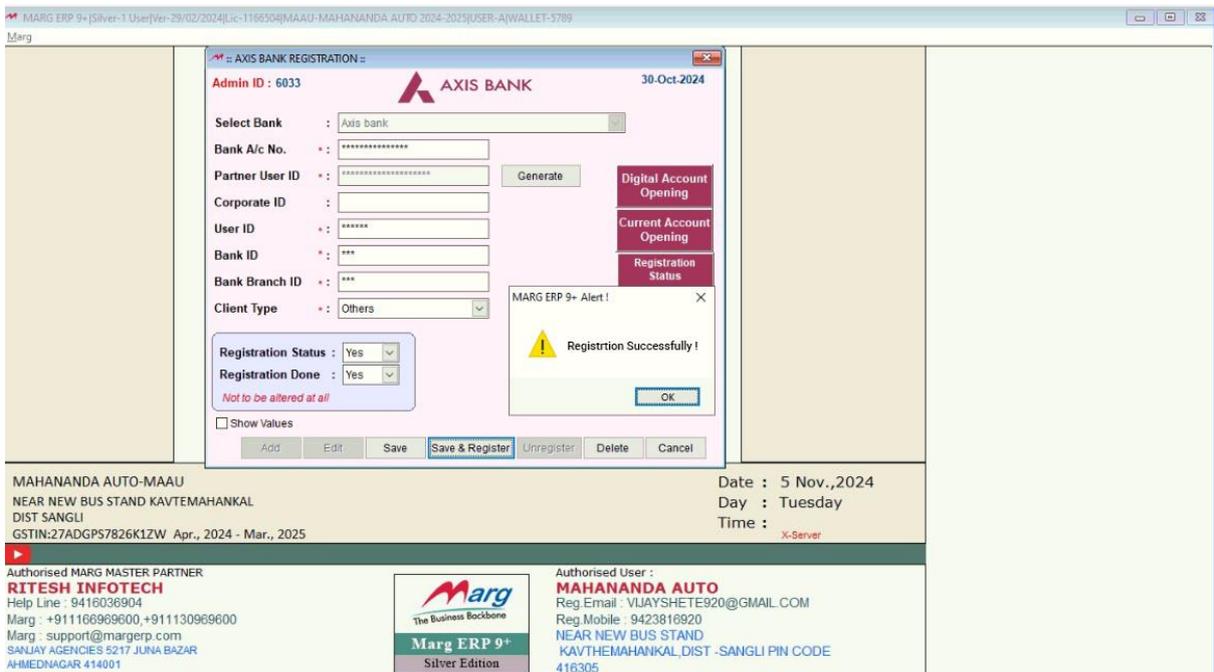
- Now, select the checkbox for "**I have read and agree to the Terms & Conditions.**"
- After selecting the checkbox, the **Proceed** button will be enabled.



- After clicking the Proceed button, it will redirect to the **Congratulations!** screen.



- Click on the **Save & Register** button, and it will show Registration successfully
- If the same user registers again and clicks the Save & Register button, they will receive the message, **"You are already registered!"**



# Thank You