ICICI Bank

DIAL CRM

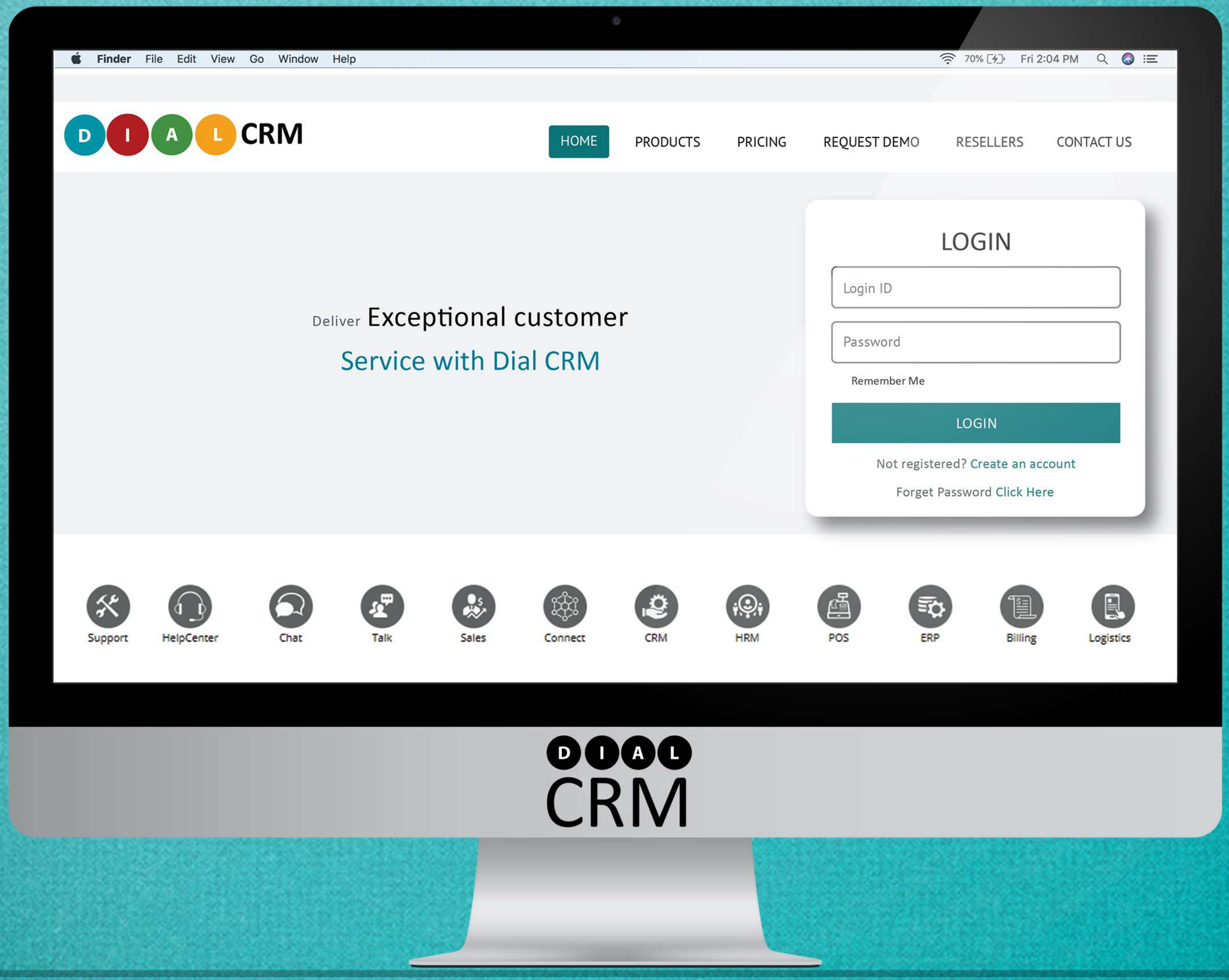
ICICI BANK & DIAL CRM INTEGRATION

ICICI Bank

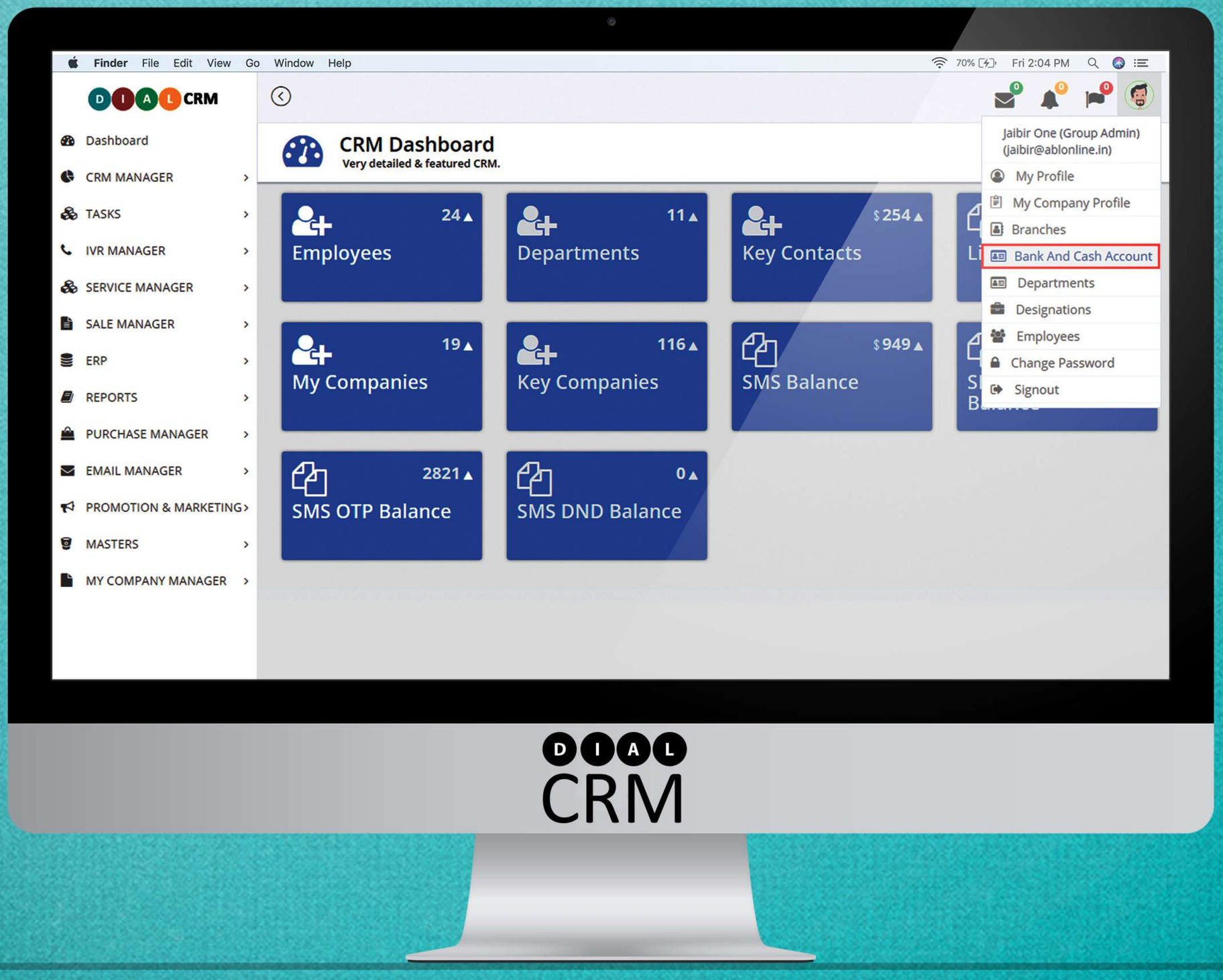
DIAL CRM

ONE TIME ICICI BANK INTERATION

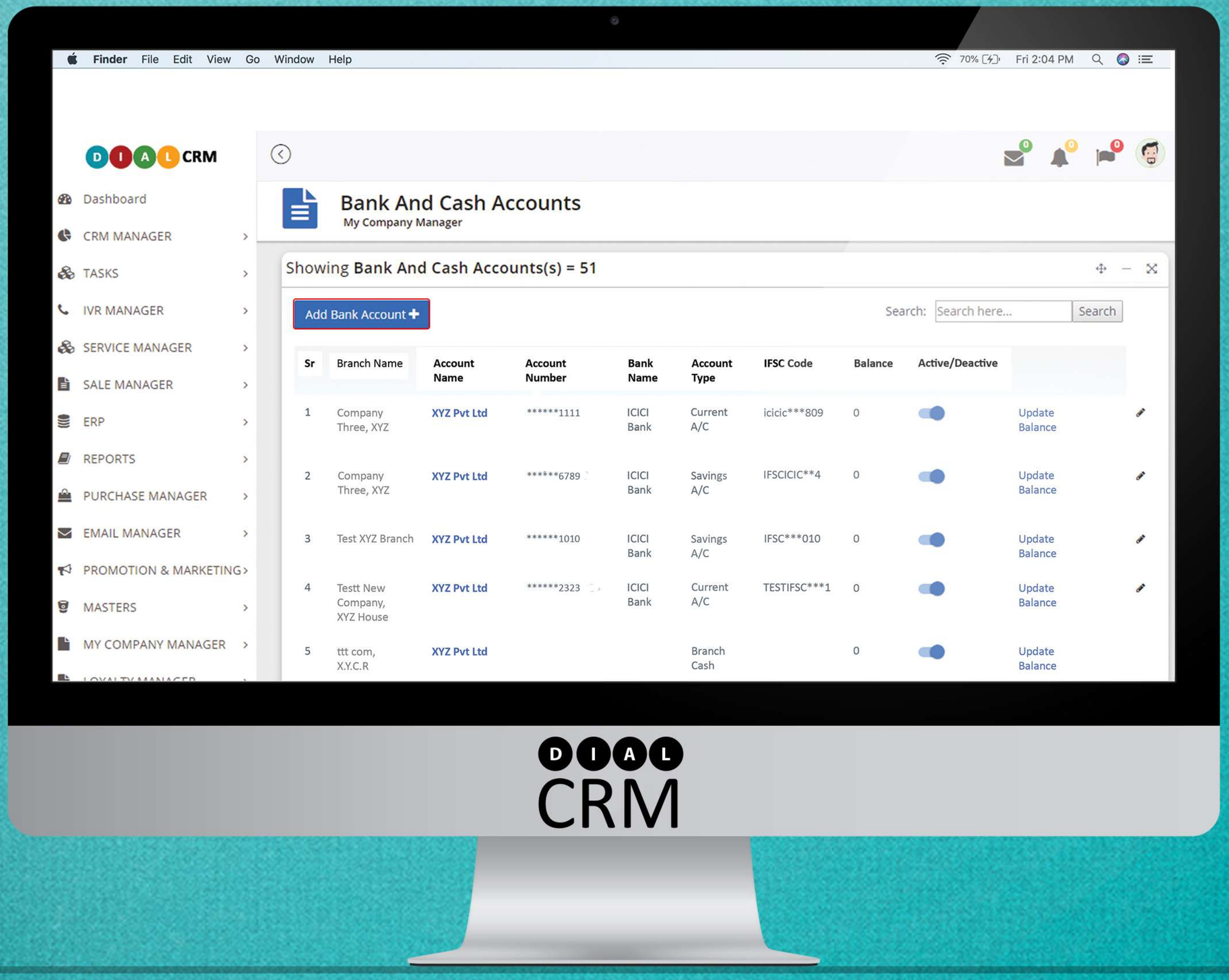
1. SIGN IN www.dialcrm.com



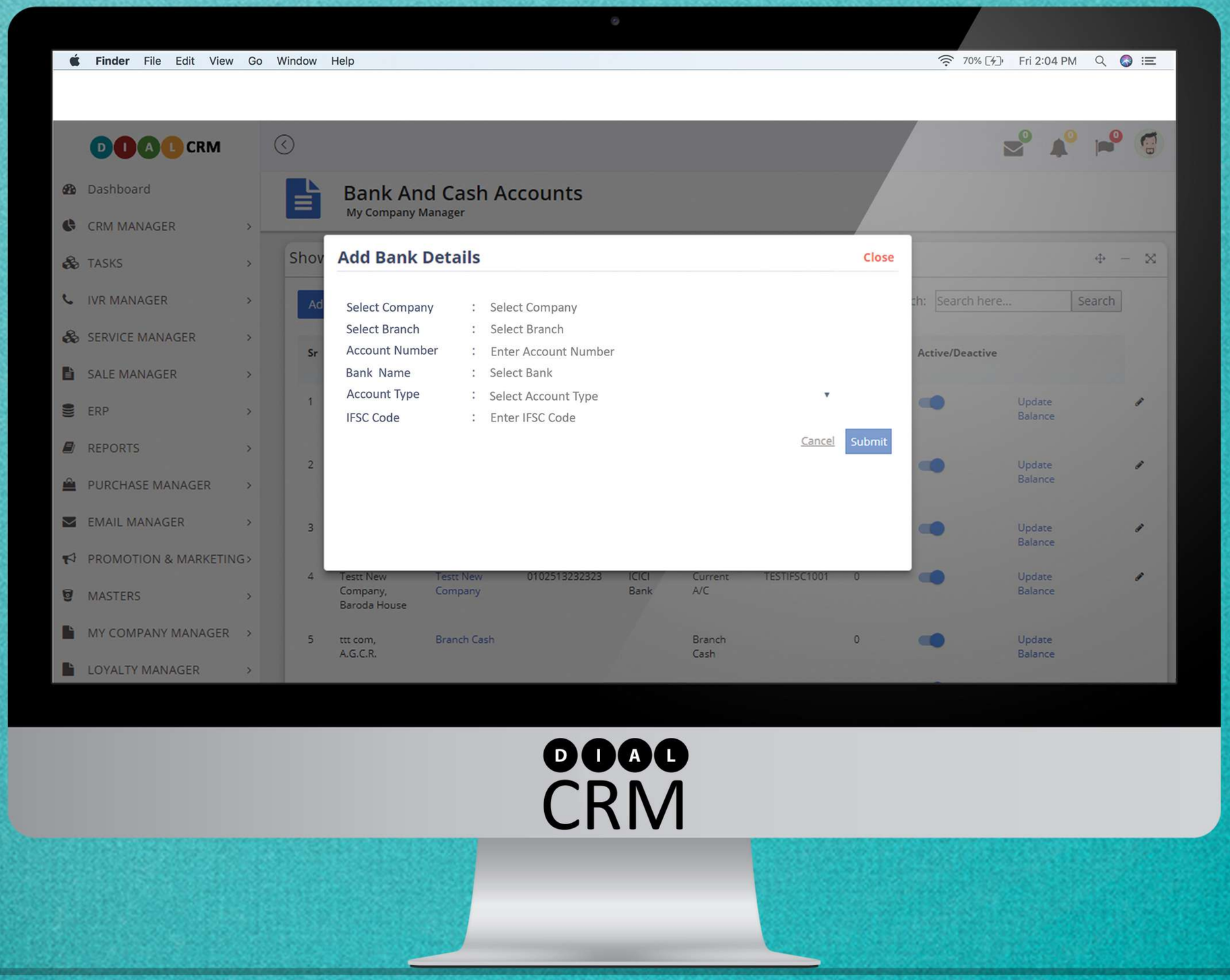
2. On CRM Dashboard Click on Bank & Cash A/C



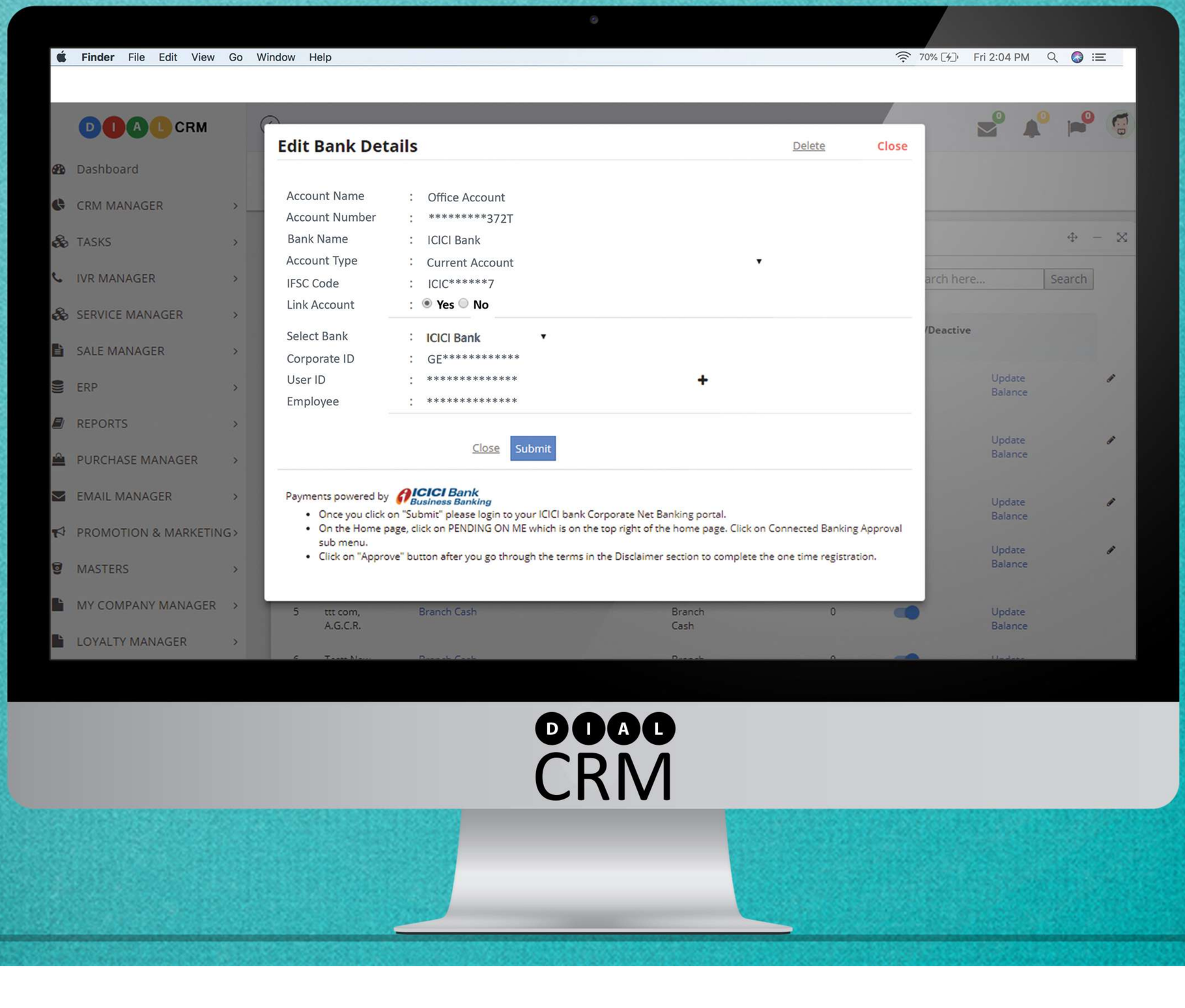
2. Add Bank Account



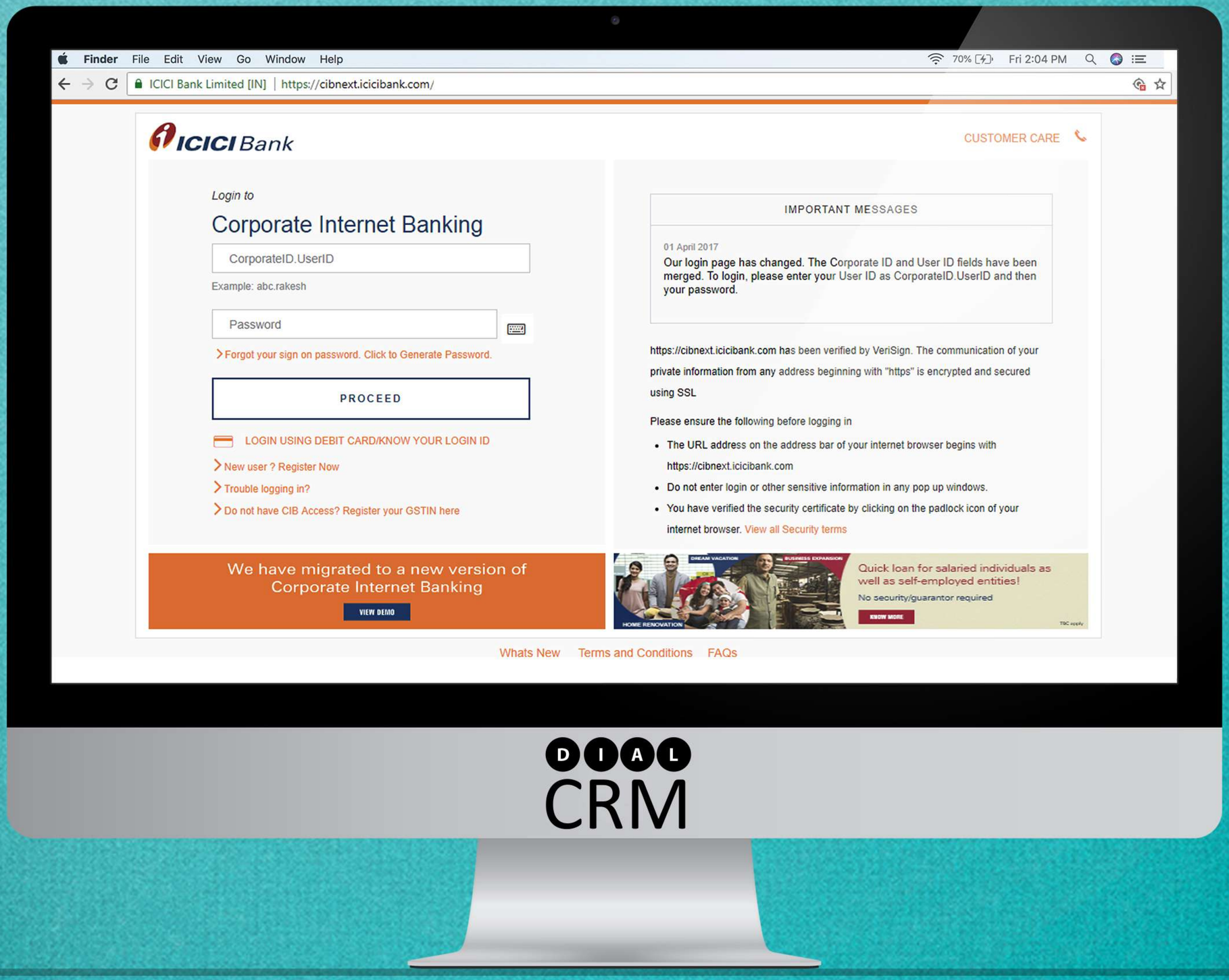
3. Add Bank Details.



4. Edit Bank Detail page & Submit.



5. Login ICICI Corporate Net Banking Account.



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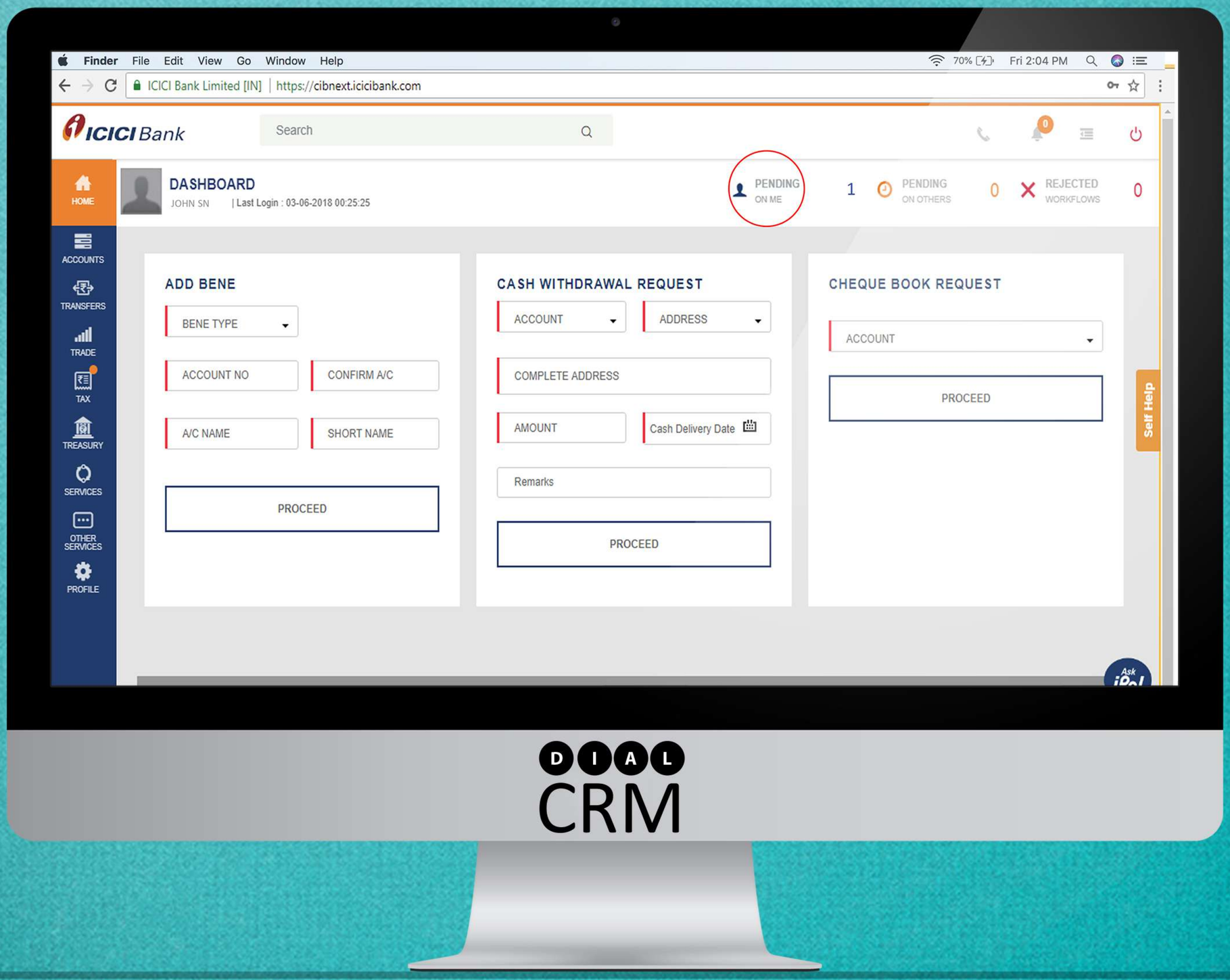
6. On the home page click on pending on me on top right.



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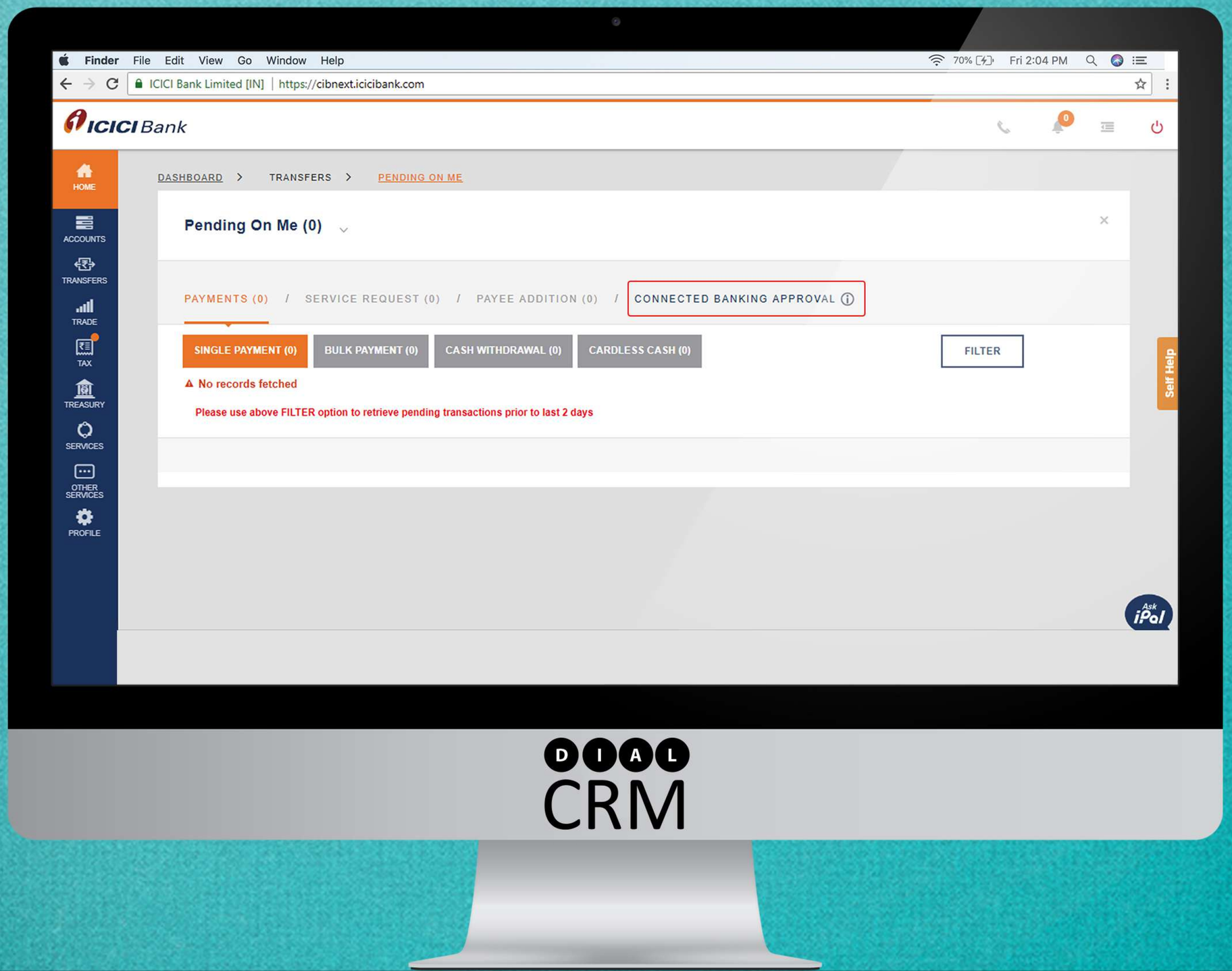
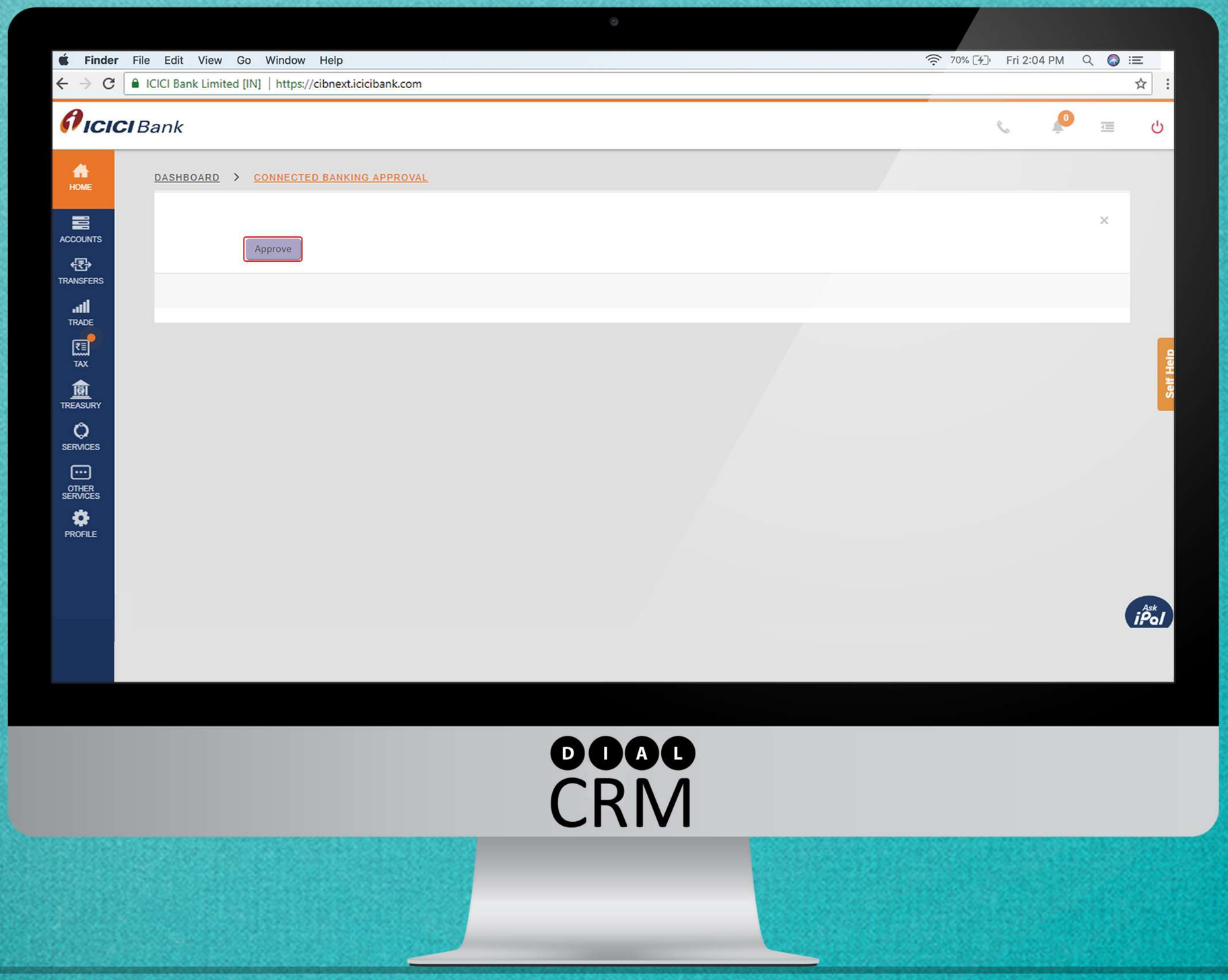
7. Click on Connected Banking Button.



8. Click on Approve Button.



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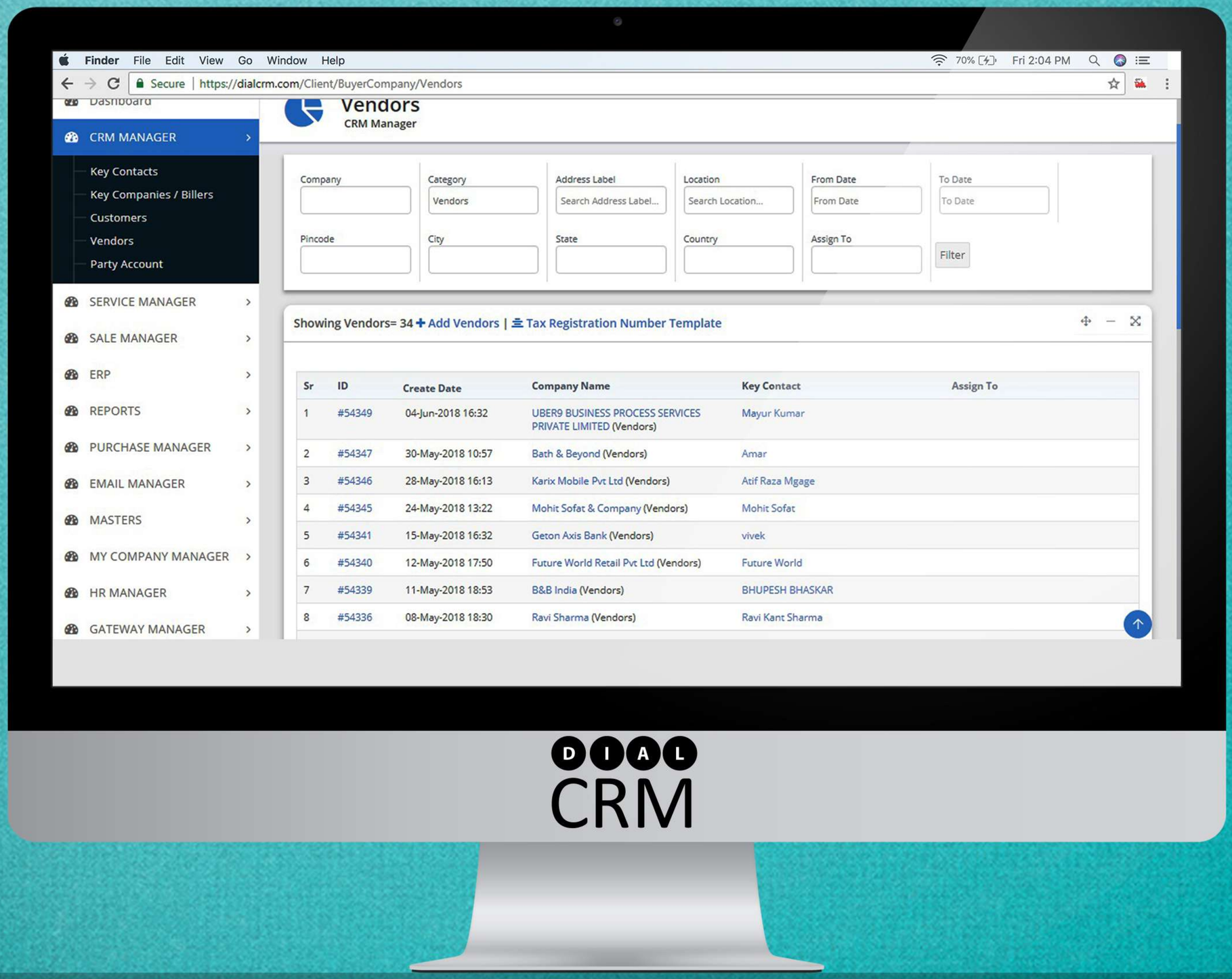
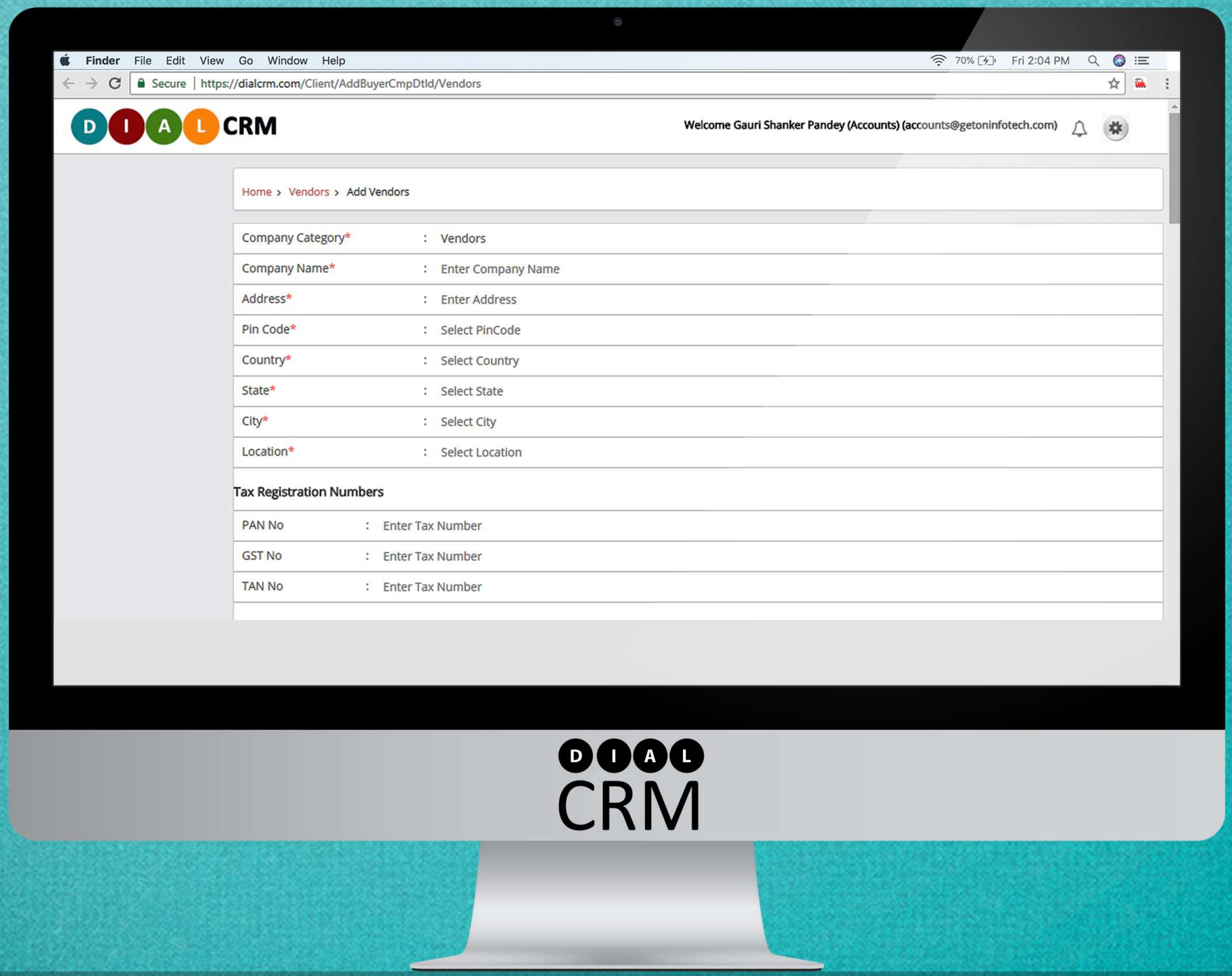
CREATE VENDOR

1. Select Vendor.



2. Add Vendor Details.



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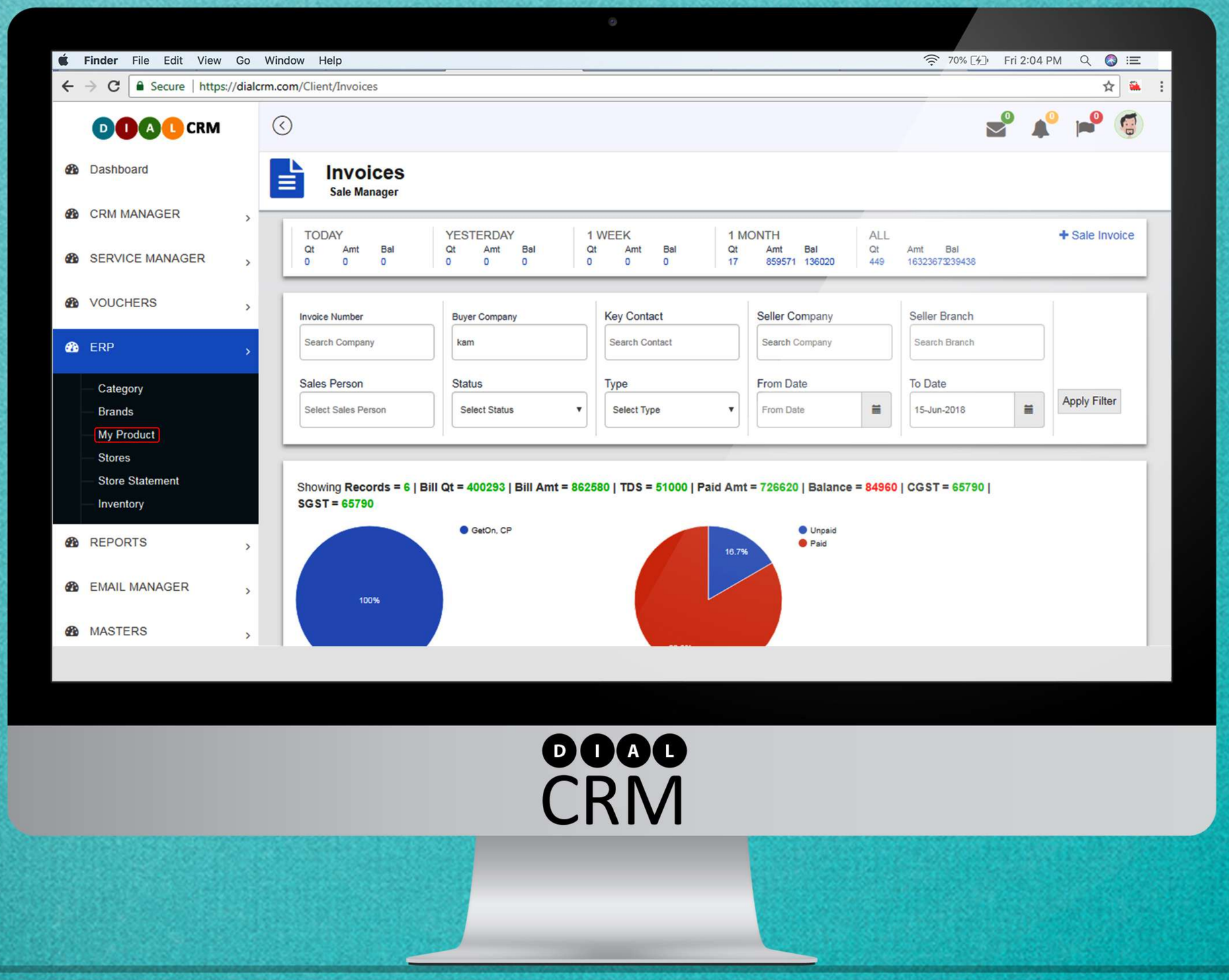
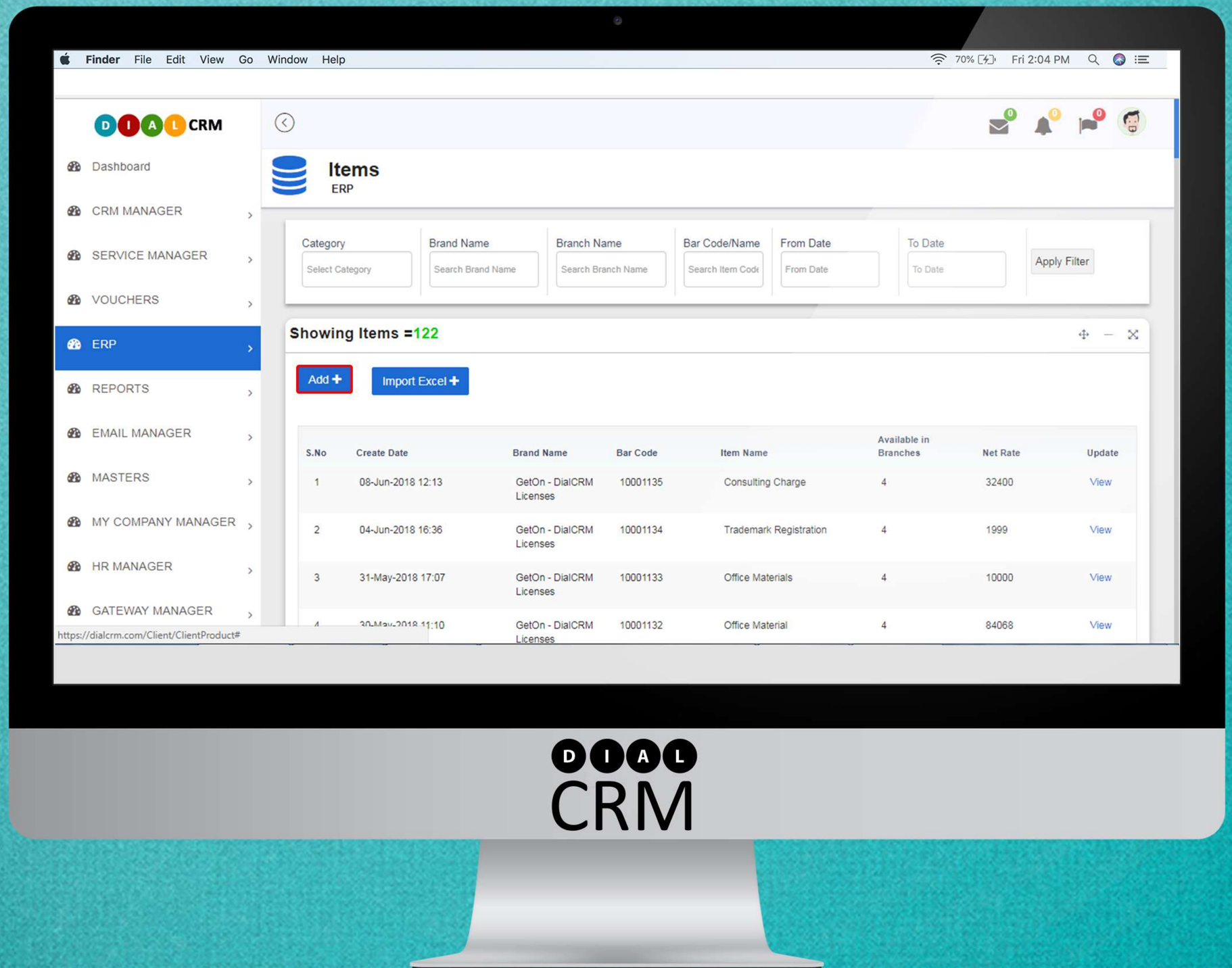
CREATE PRODUCT

1. IN ERP CLICK ON MY PRODUCT.



2. CLICK ON ADD BUTTON TO ADD ITEMS.



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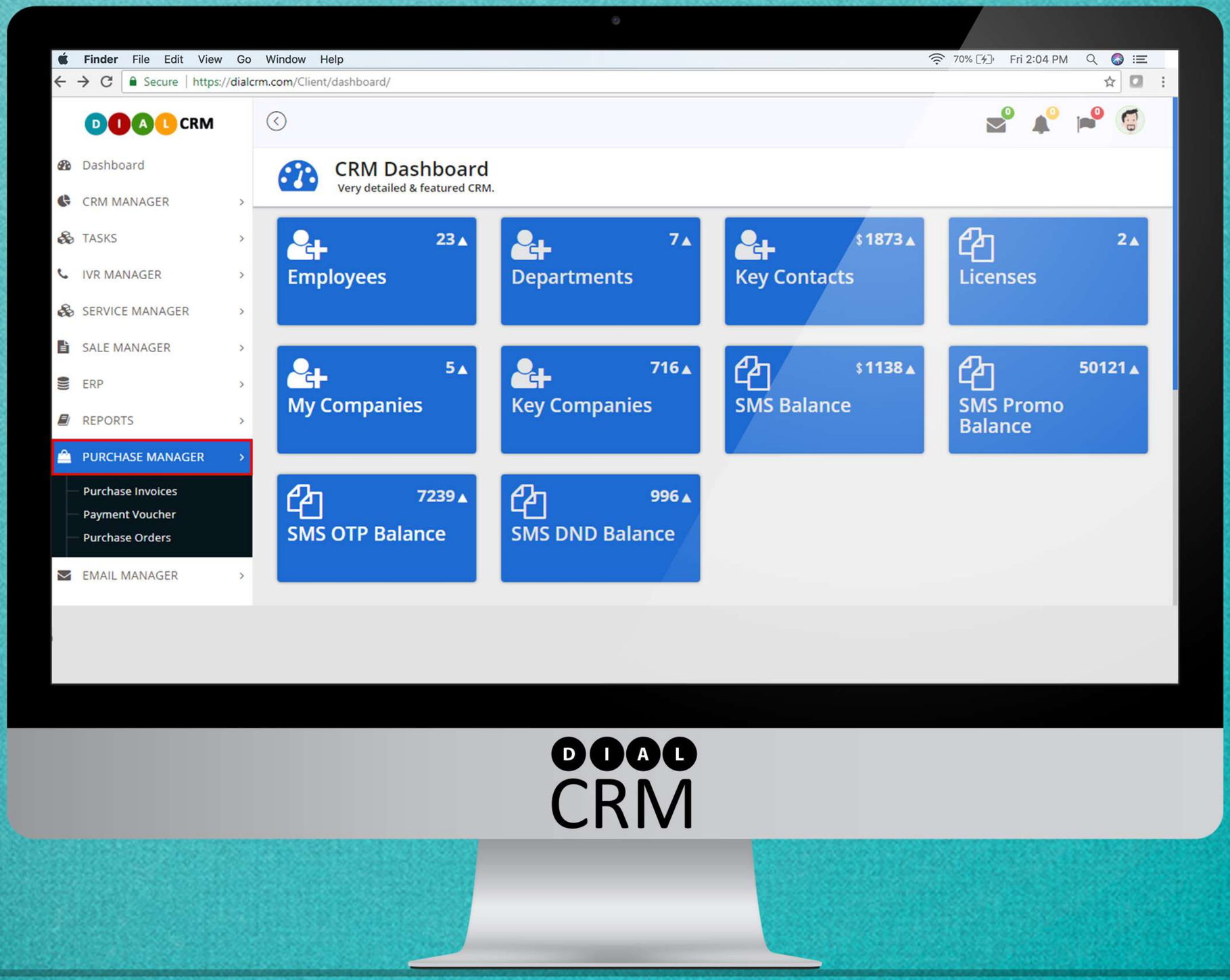
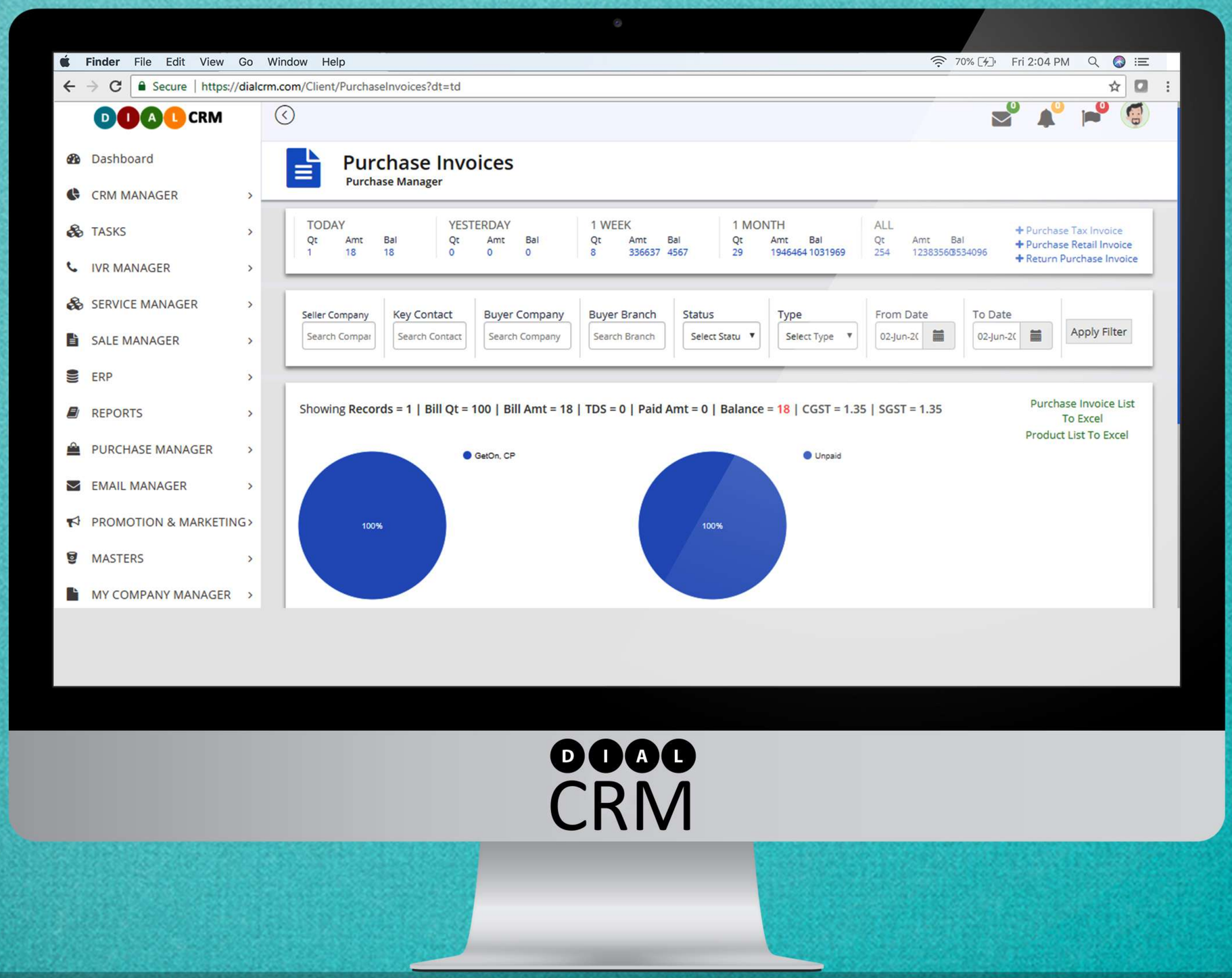
CREATE INVOICE

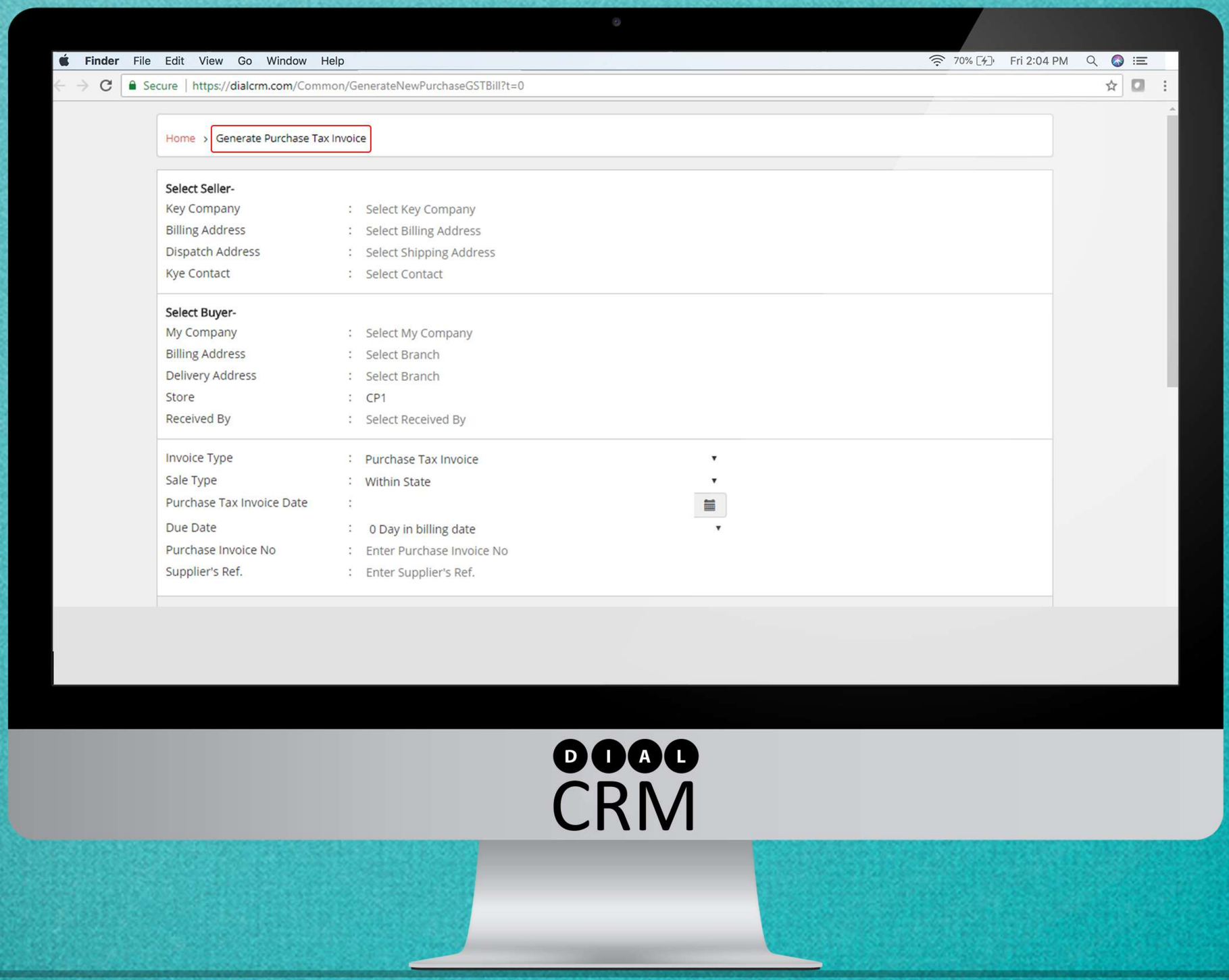
1. Select Purchase Manager in the CRM Dashboard page



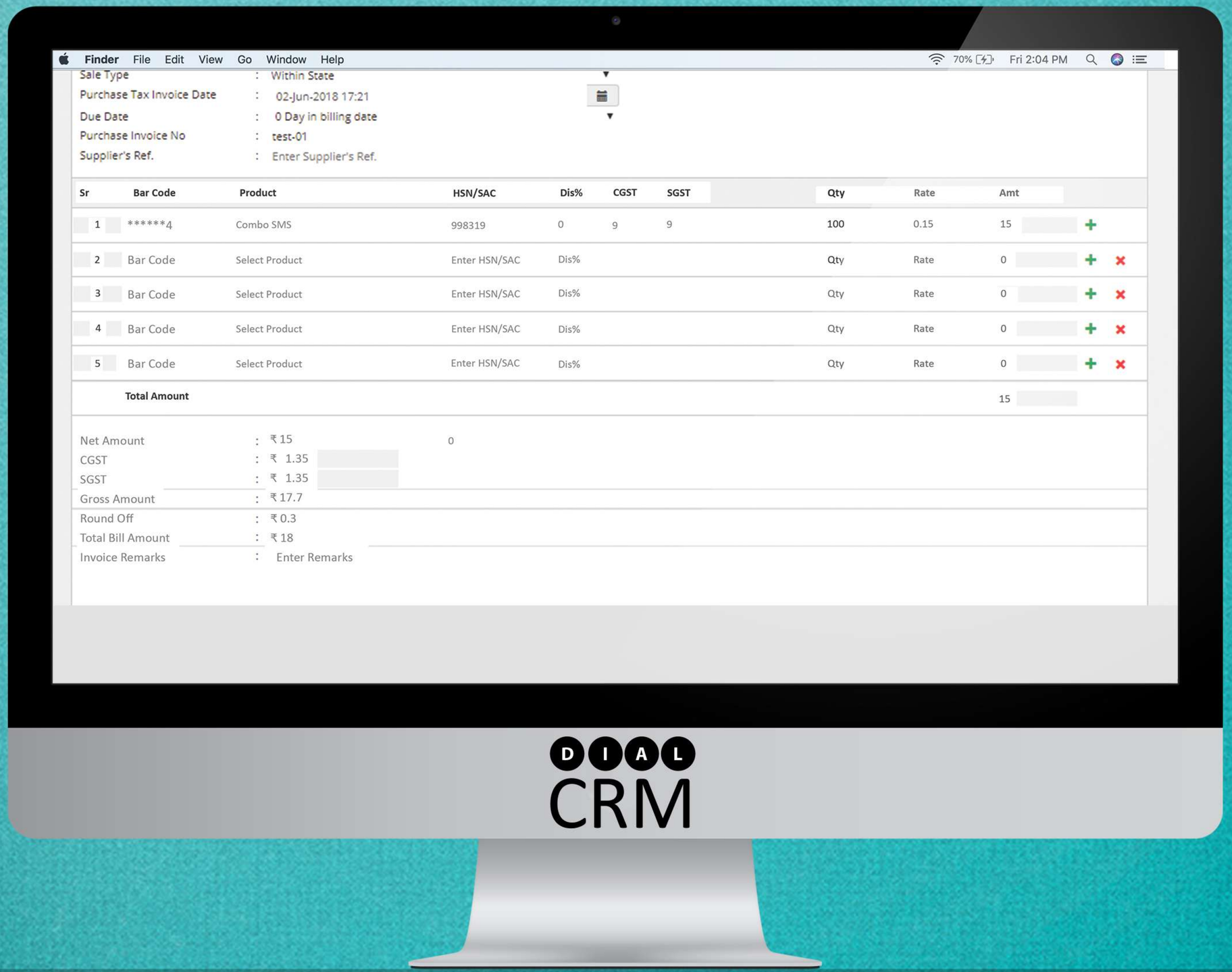
2. Add Purchase Tax Invoice on Purchase Invoice page.



3. Generate Purchase Tax Invoice.



4. Select Seller, Buyer, Product Details



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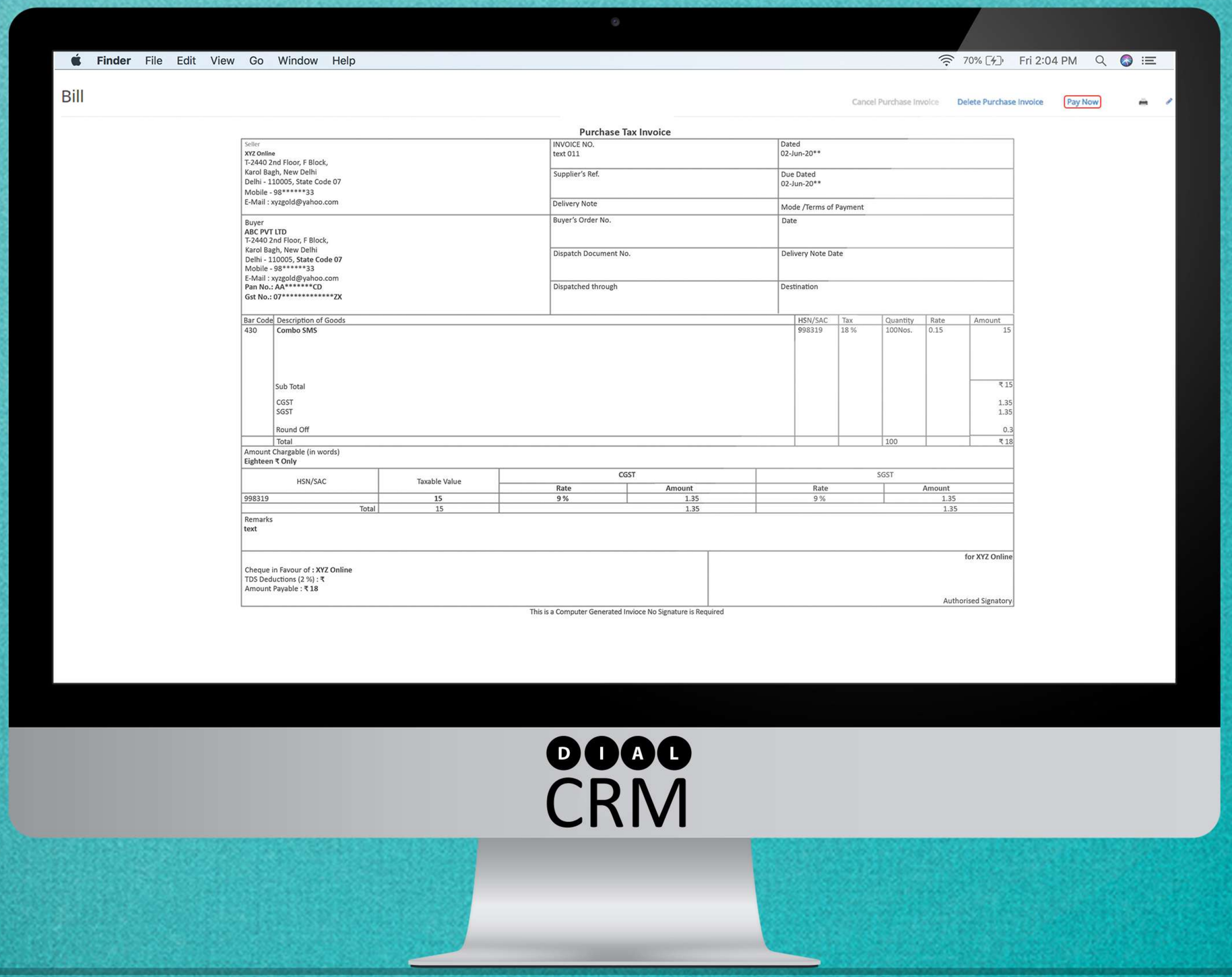
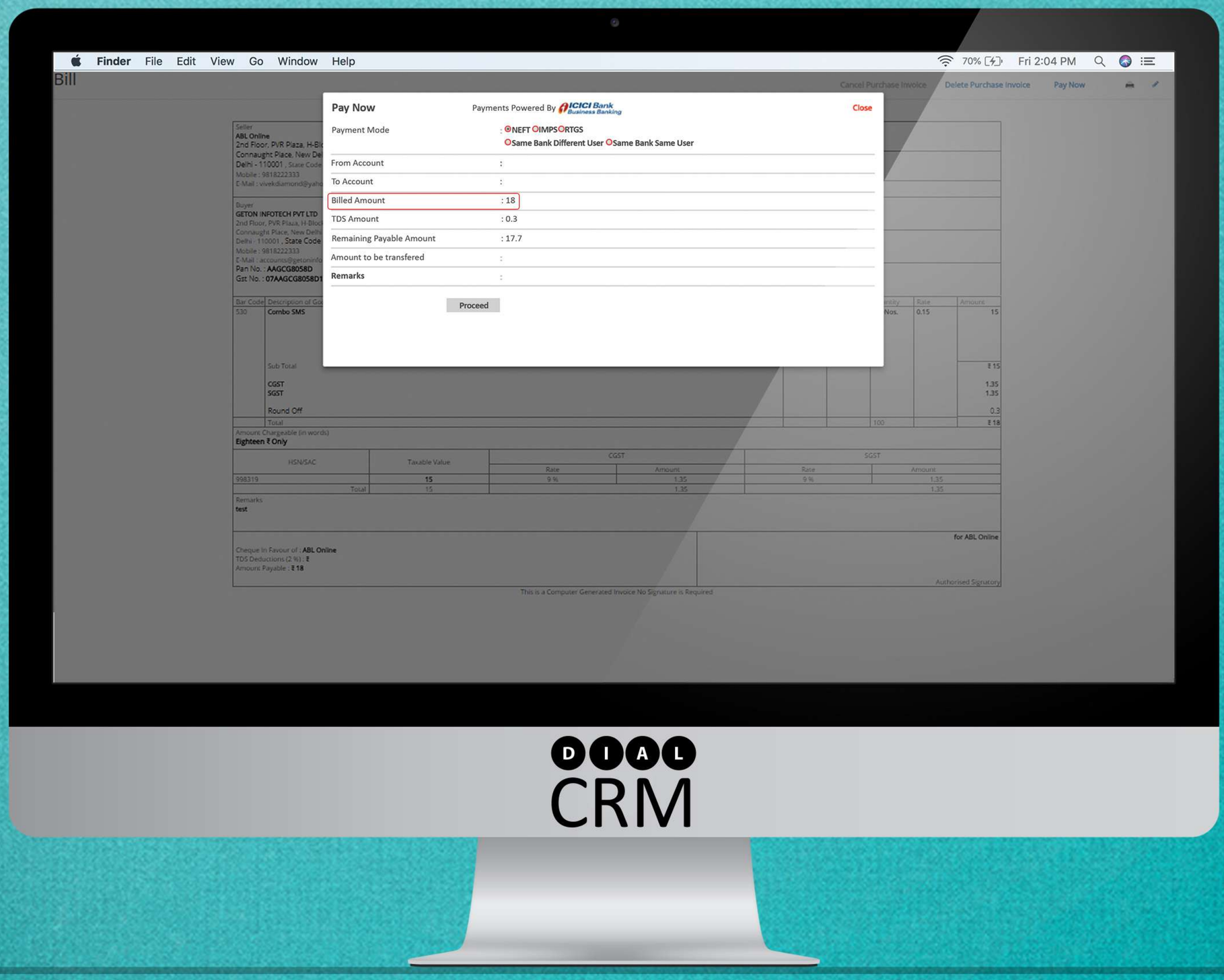
TO MAKE VENDOR PAYMENTS ONE TIME INTEGRATION WITH ICICI BANK NEEDS TO BE DONE.

1. Go to Purchase Invoice & Click on Pay now in the Invoice Generated Earlier.



2. Select Payment Mode & Fill Billing Amount.



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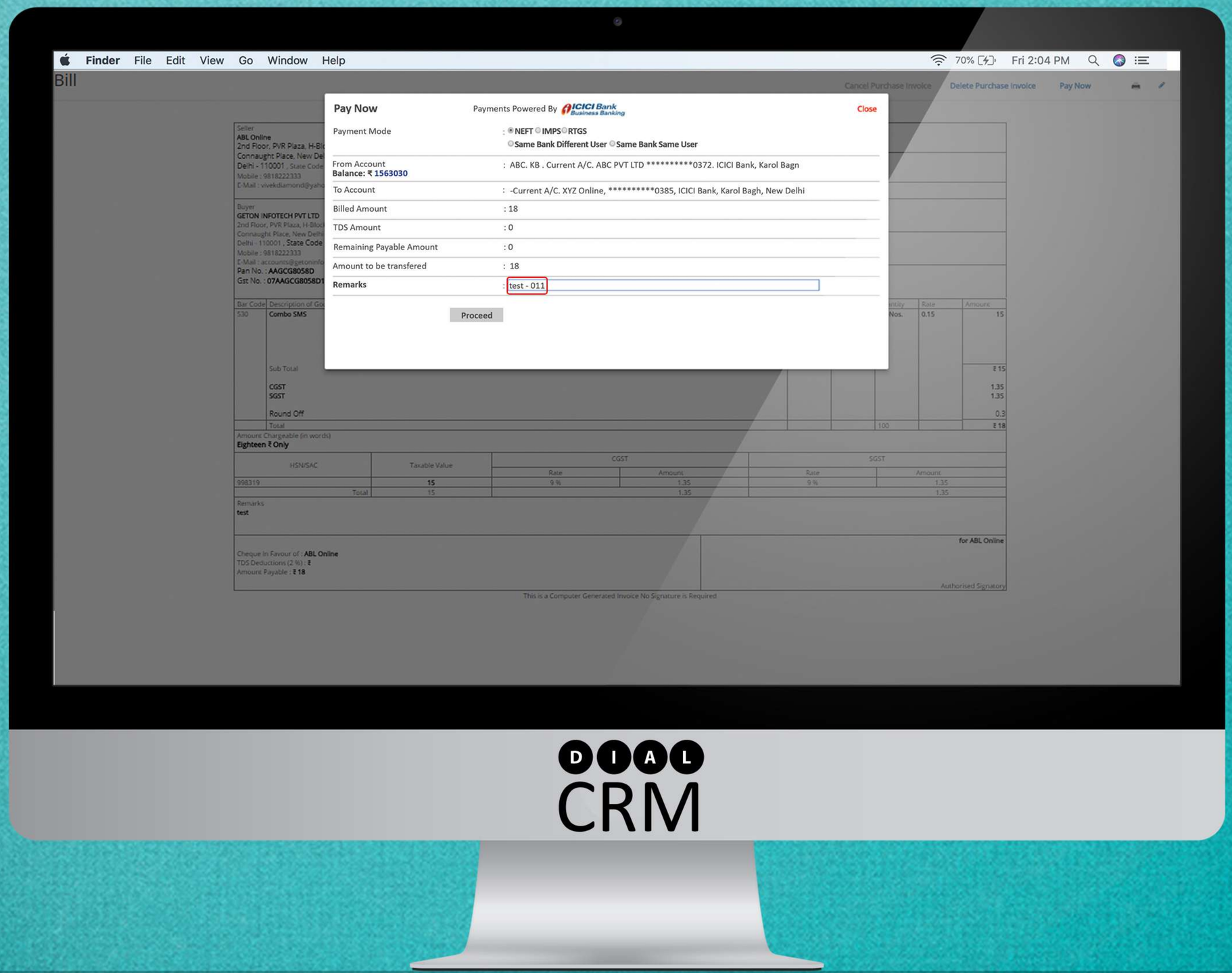
3. Fill Amount to be transferred & Remarks.



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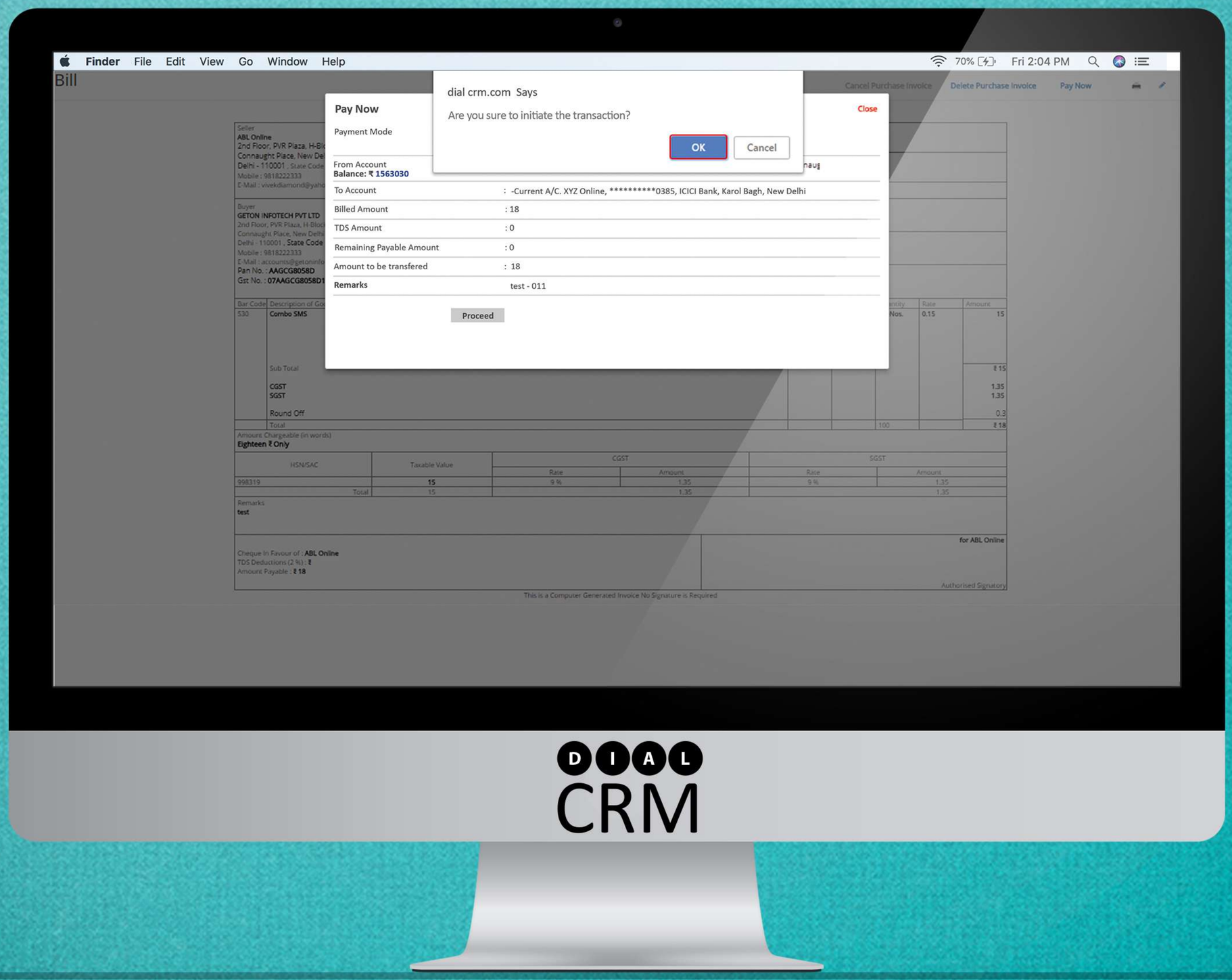
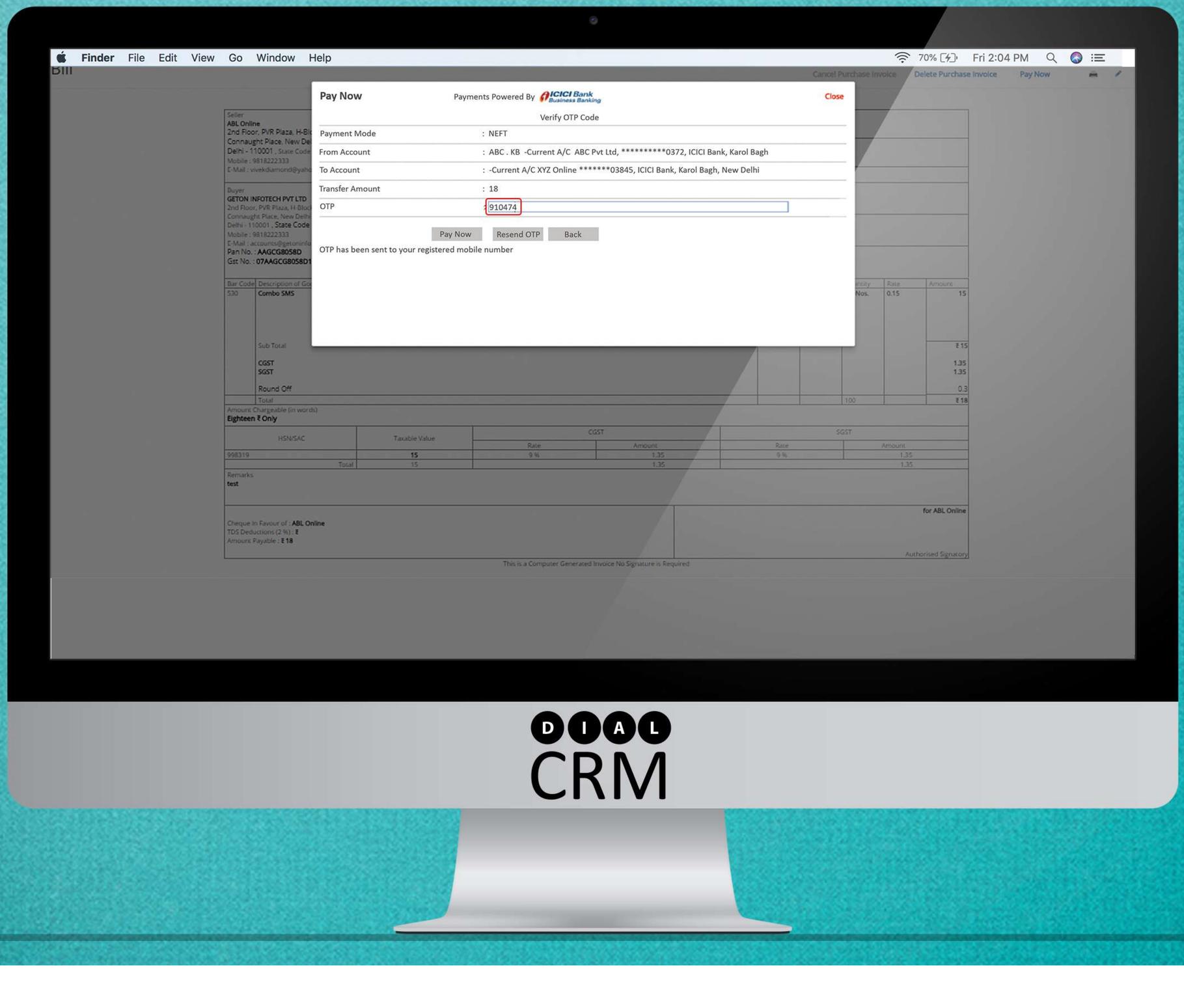
4. Confirm transaction & proceed



5. Fill OTP & Pay Now.



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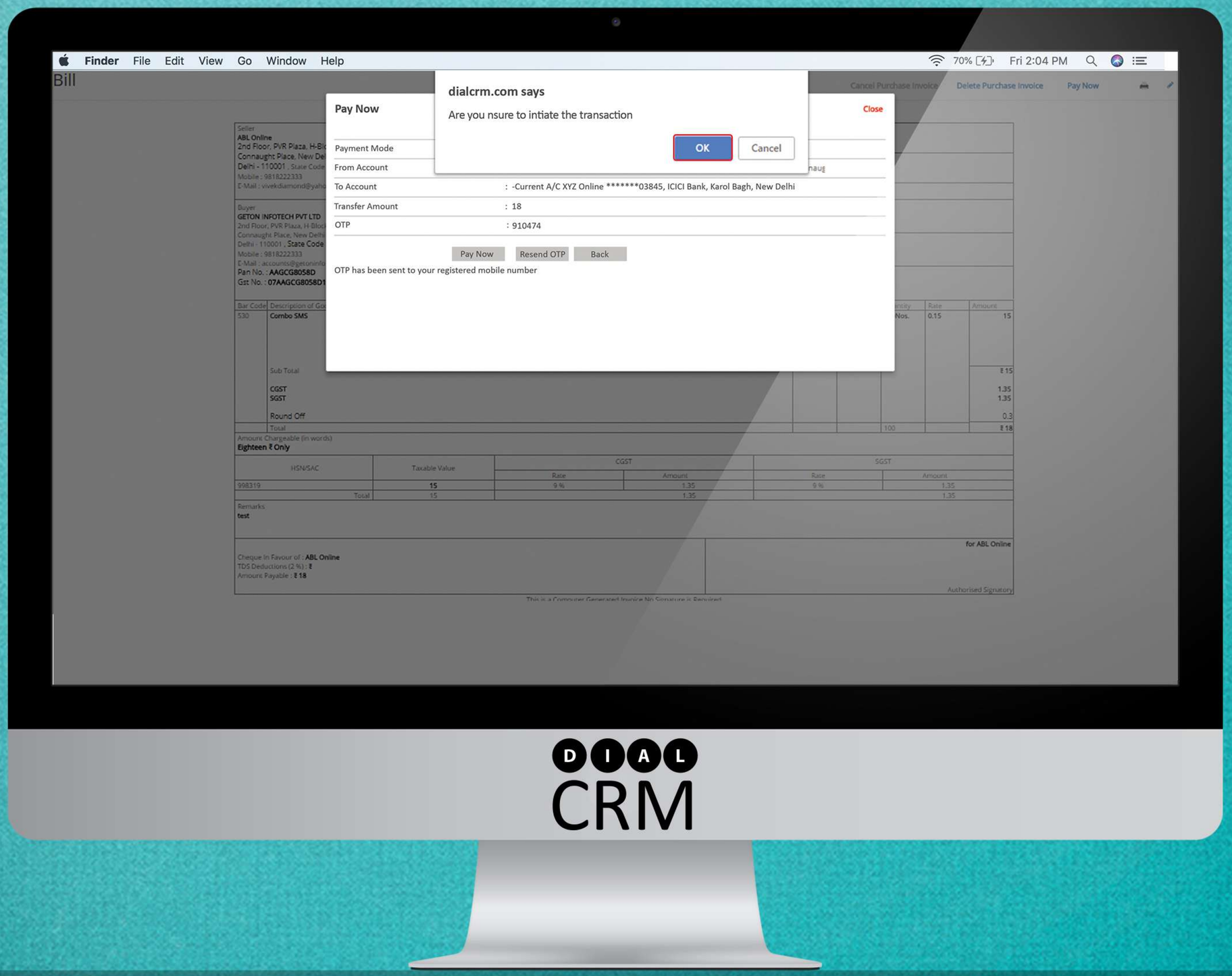
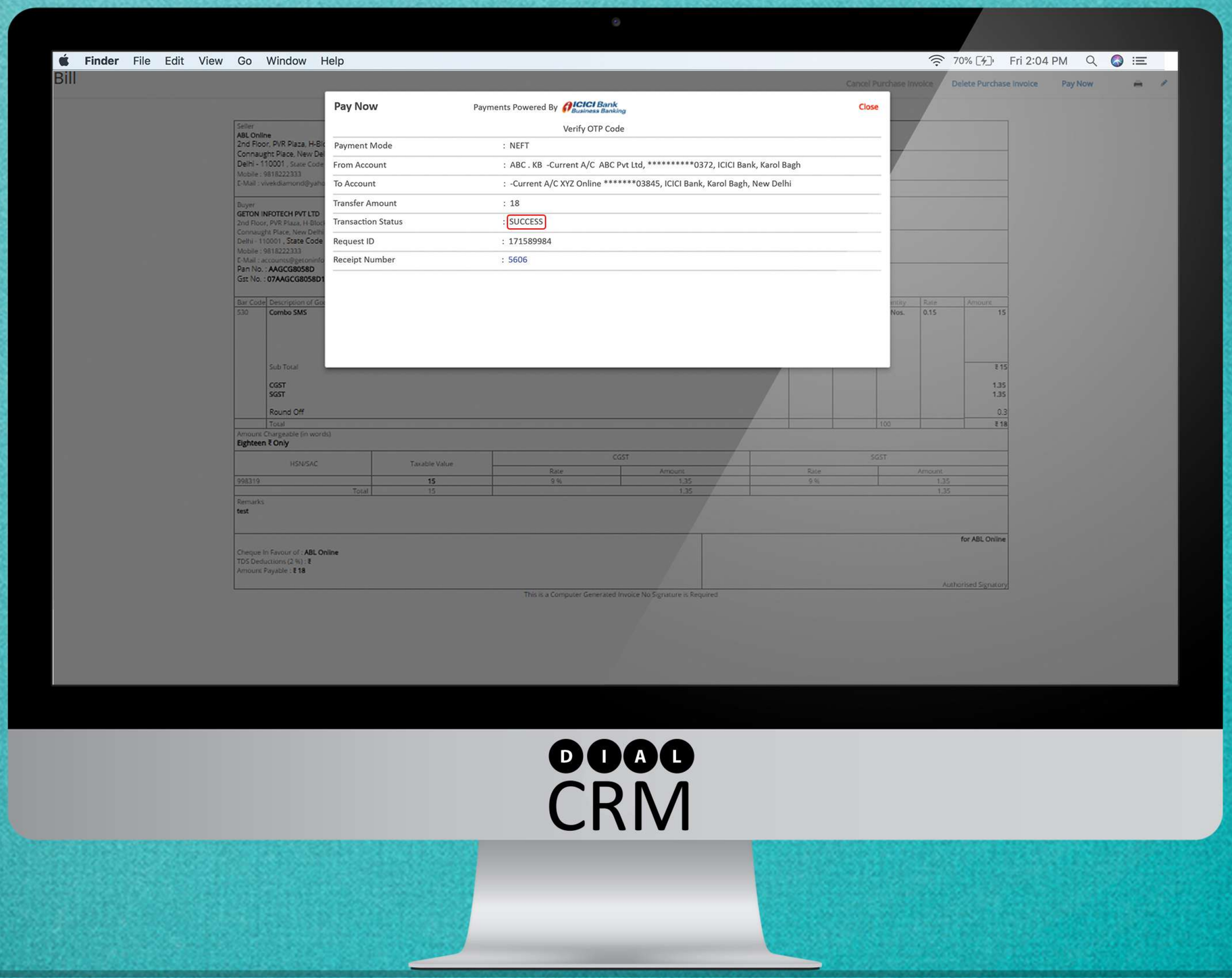
6. Confirm Ok


Finder File Edit View Go Window Help
70% Fri 2:04 PM
Bill
Cancel Purchase Invoice
Delete Purchase Invoice
Pay Now
dialcrm.com says
Are you nsure to intiate the transaction
OK
Cancel
Pay Now
Close
Payment Mode
From Account
To Account : -Current A/C XYZ Online *******03845, ICICI Bank, Karol Bagh, New Delhi
Transfer Amount : 18
OTP : 910474
Pay Now
Resend OTP
Back
OTP has been sent to your registered mobile number
Seller
ABL Online
Buyer
GETON INFOTECH PVT LTD
Pan No. : AAGCG8058D
Gst No. : 07AAGCG8058D1
Combo SMS
Sub Total
CGST
SGST
Round Off
Total
Amount Chargeable (in words)
Eighteen ₹ Only
HSN/SAC
Taxable Value
998319
Remarks
test
Cheque In Favour of : ABL Online
TDS Deductions (2 %) : ₹
Amount Payable : ₹ 18
for ABL Online
Authorised Signatory
DIAL
CRM

7. Amount Successfully Transferred Page.



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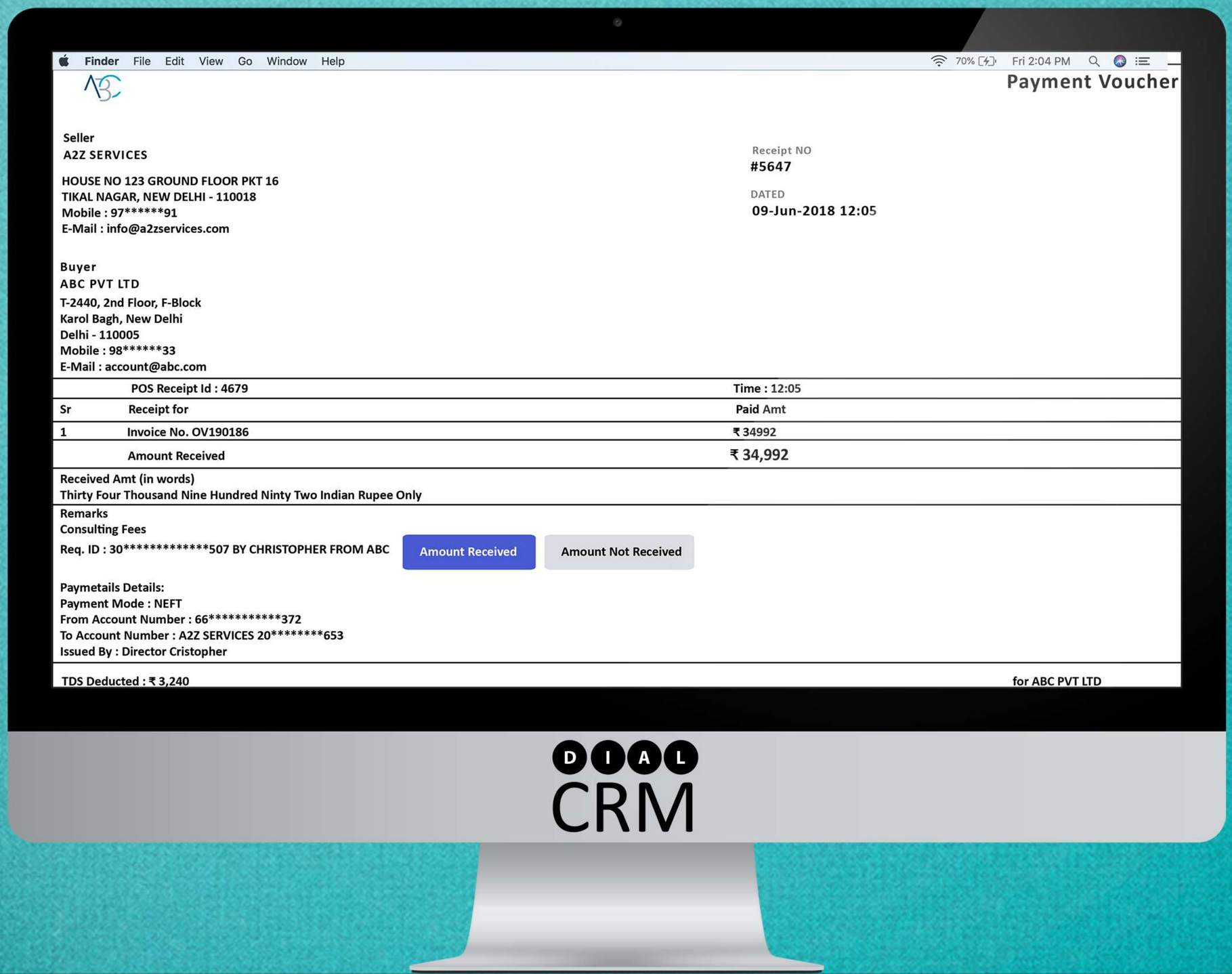
8. Payment Receipt