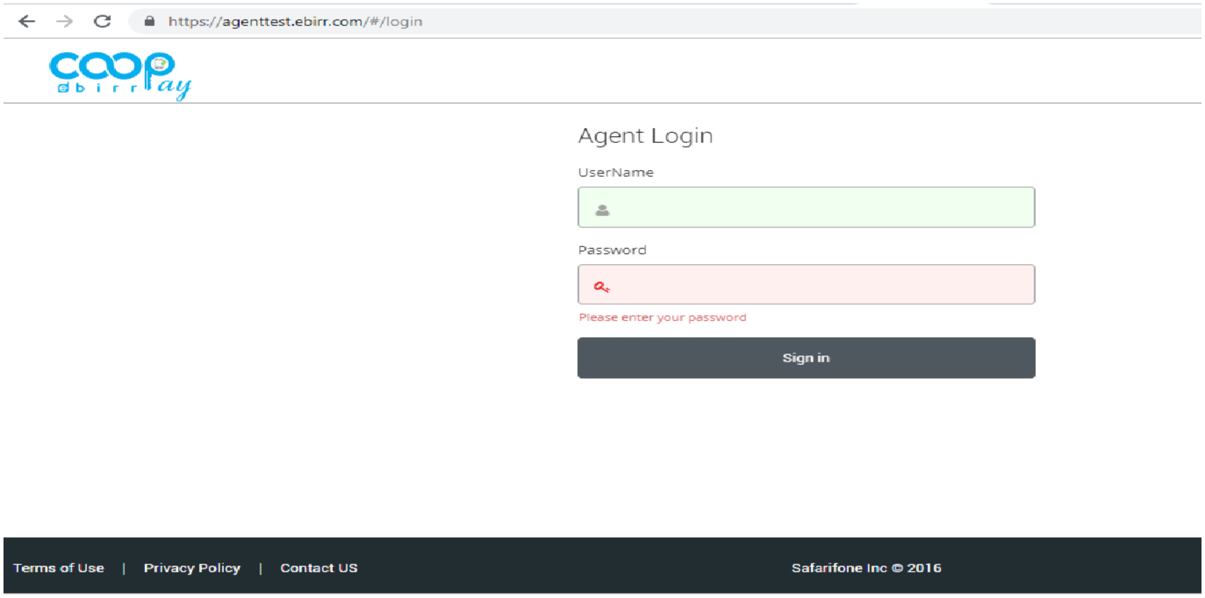
Agent portal user guide

Agent portal user guide

This portal is given to branch Tellers to create customers and manage customer activities. Agents receive float from dealers and transfers to customers.

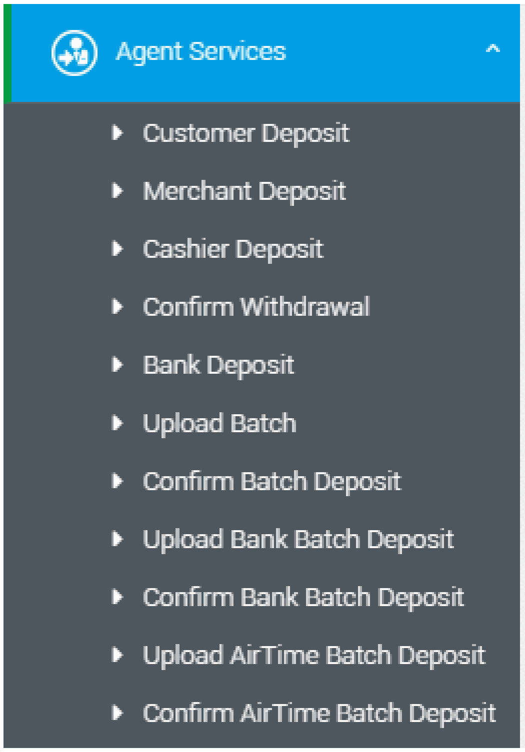
❖ Log in window



Enter user name, and password and click on sign in.

Agent Services

This menu comprises of services delivered by branch tellers. And these services include customer deposit,
Merchant deposit,
Cashier deposit,
Confirming withdraw,
Bank deposit,
Upload and confirm batch deposits



Customer deposit

To make customer deposit tellers will have to receive a deposit slip and an amount of cash equivalent to the one written on the deposit slip,

Click on Agent services

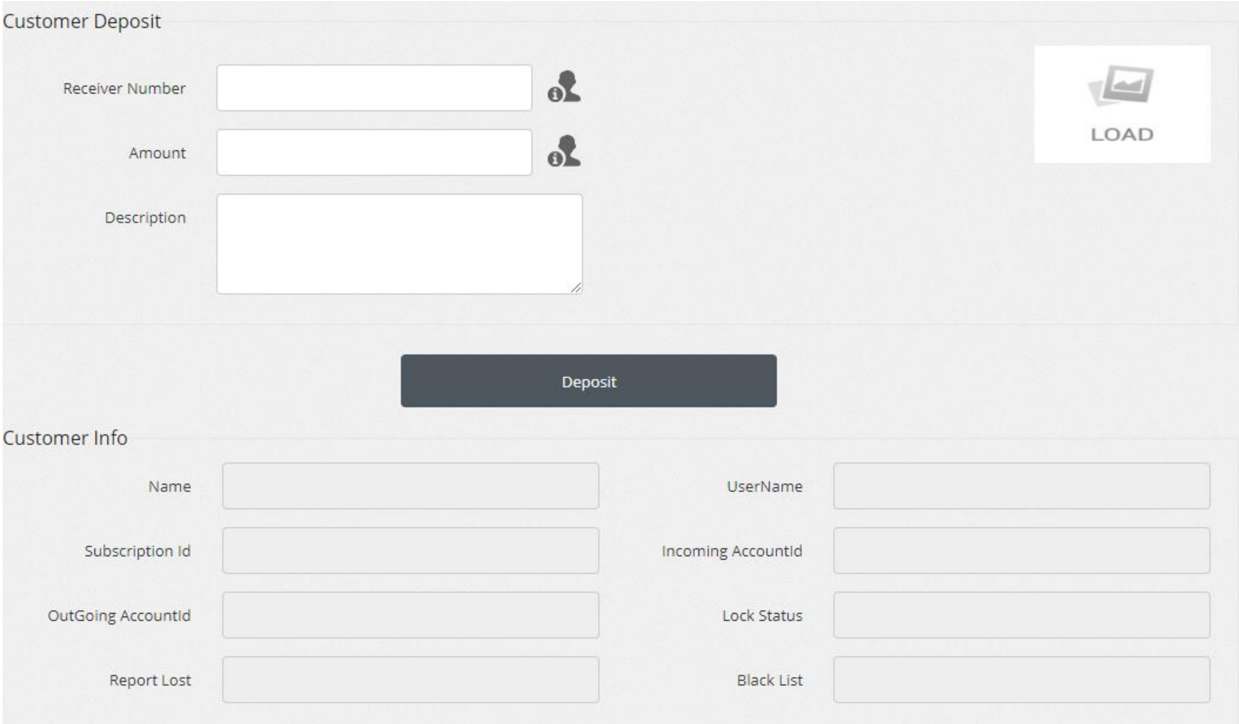
Click on customer deposit

Enter receiver's/customers' number

Enter amount

Enter Narration/description and

Click on deposit



Merchant deposit

To make merchant deposit tellers will have to receive a deposit slip and an amount of cash equivalent to the one written on the deposit slip from the merchant.

Click on Agent services

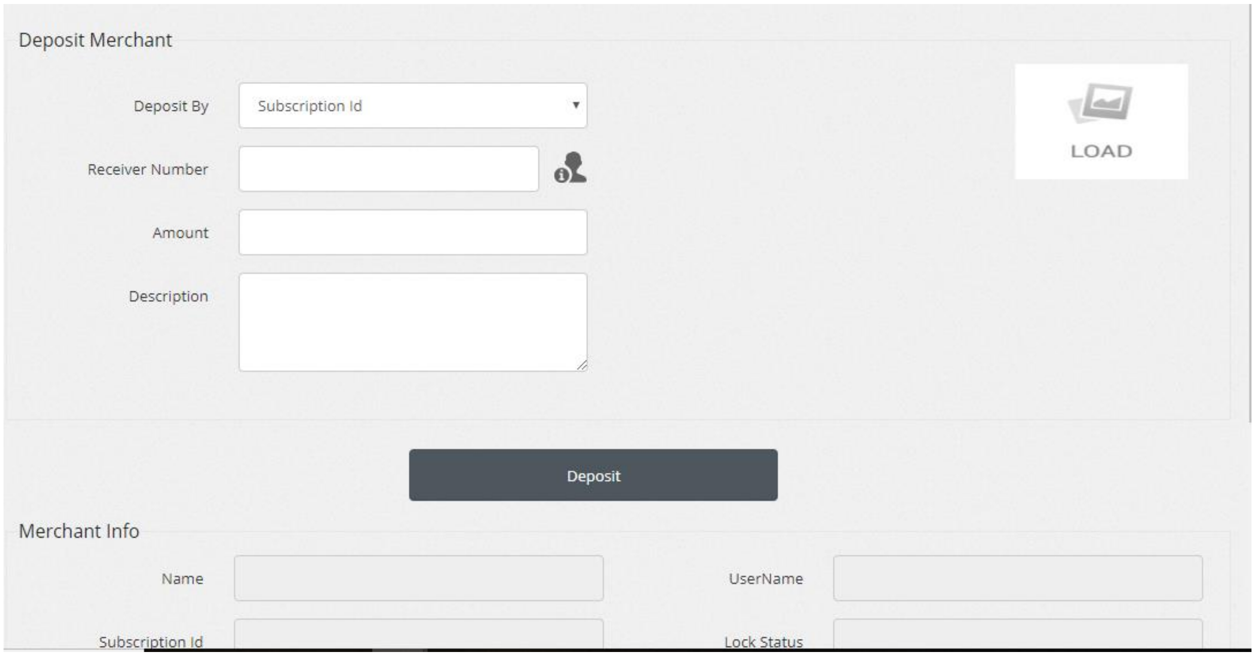
Click on merchant deposit

Enter receiver's/merchants' number

Enter amount

Enter Narration/description and

Click on deposit



Cashier deposit

To make cashier deposit tellers will have to receive a deposit slip and an amount of cash equivalent to the one written on the deposit slip from the cashier.

Click on Agent services

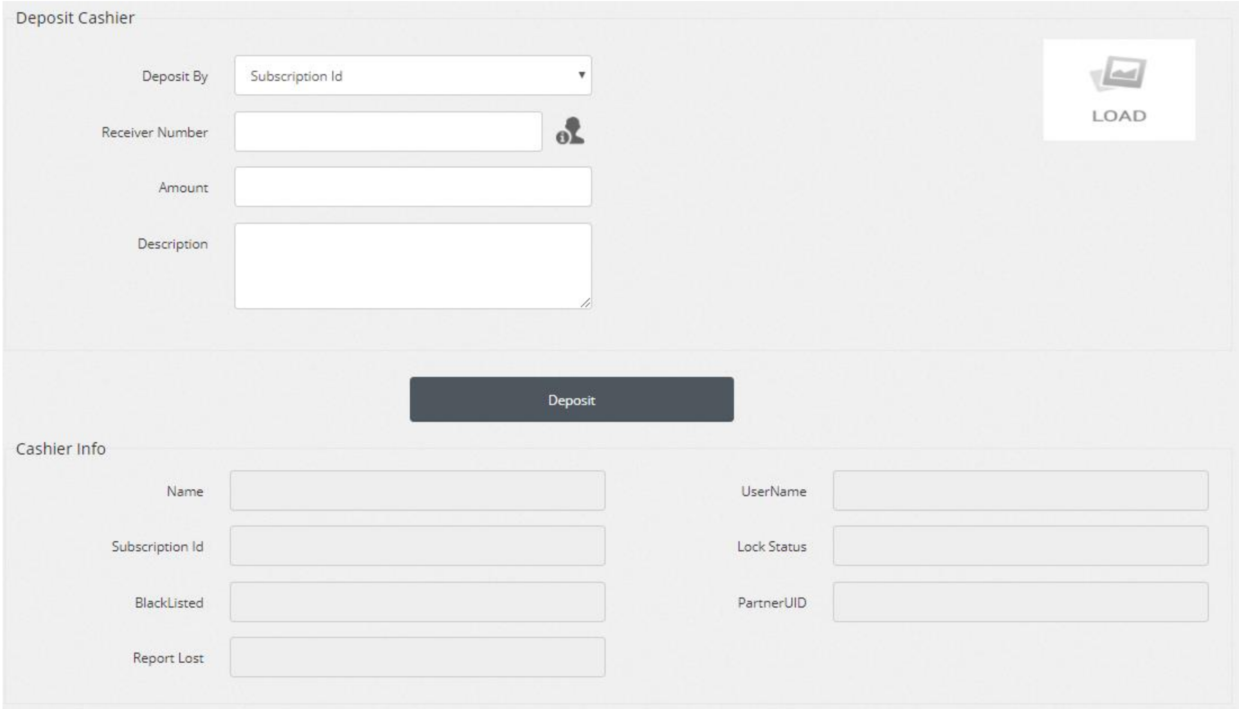
Click on cashier deposit

Enter receiver’s/cashiers’ number

Enter amount

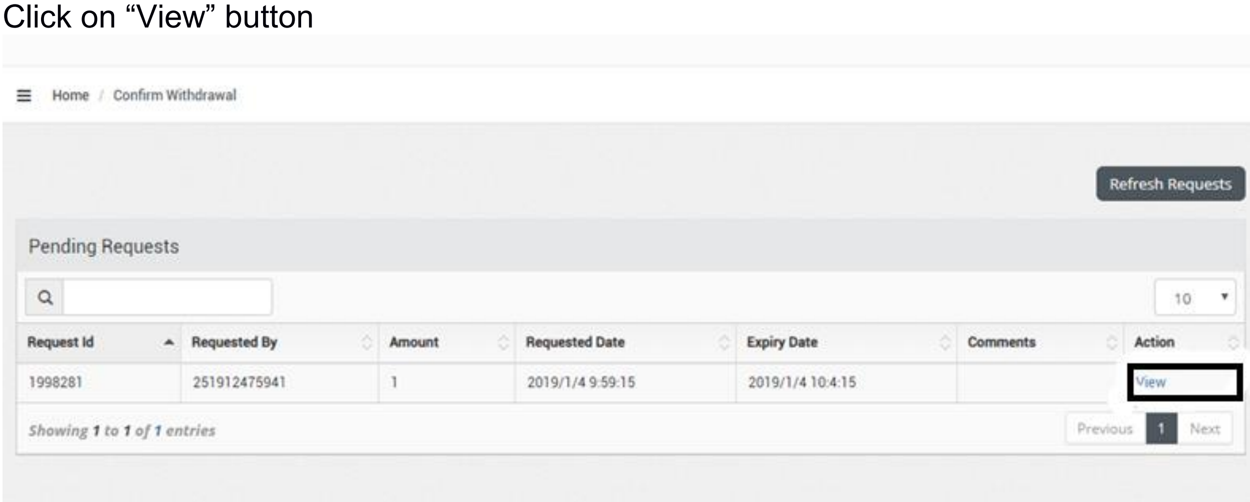
Enter Narration/description and

Click on deposit



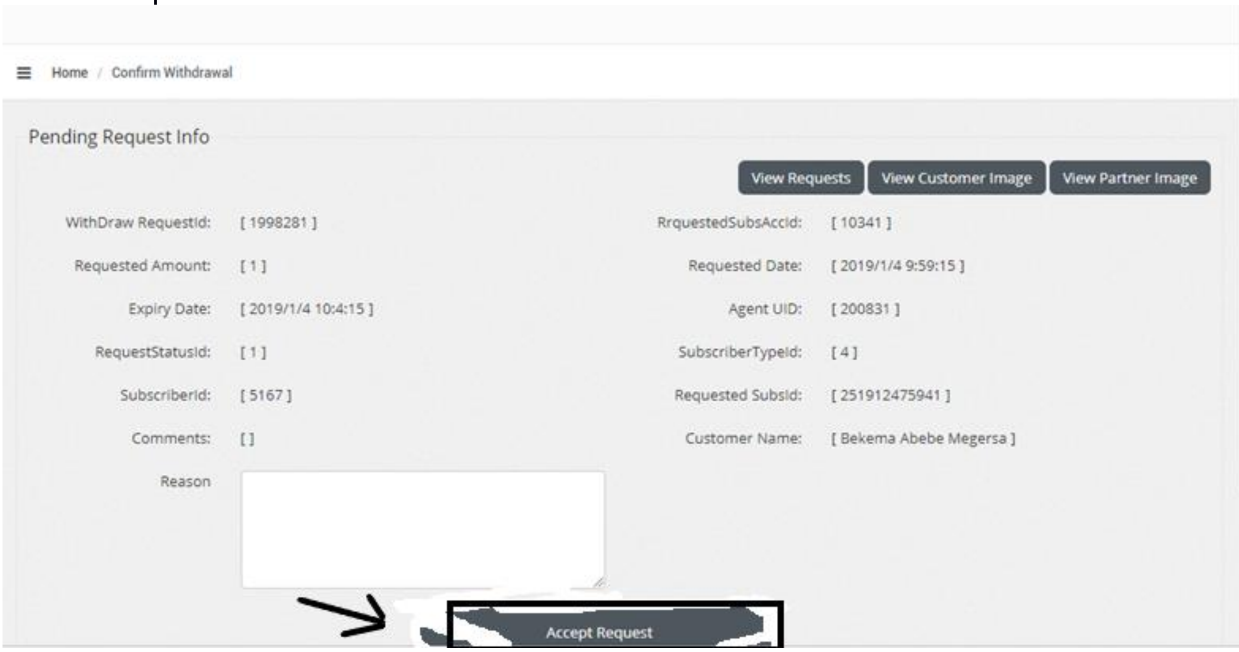
Confirming withdraw

This menu is used when tellers make withdraw for customers, merchants and cashiers.
First customers, merchants and cashiers send withdraw request to the teller then
Click on Agent services
Click on confirm withdraw, if there is a withdraw request it it will automatically appear on the page
Click on "View" button



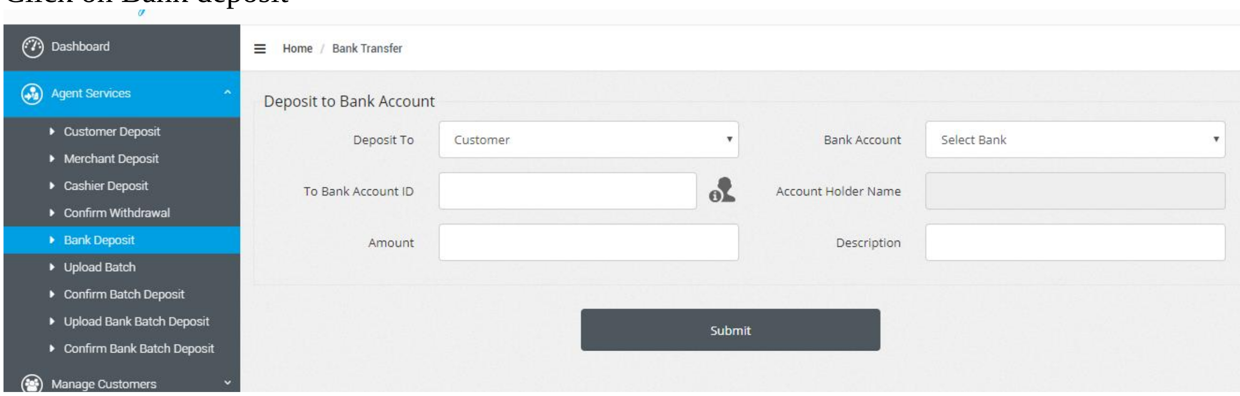
On the next page,
Write reason and

Click Accept withdraw.

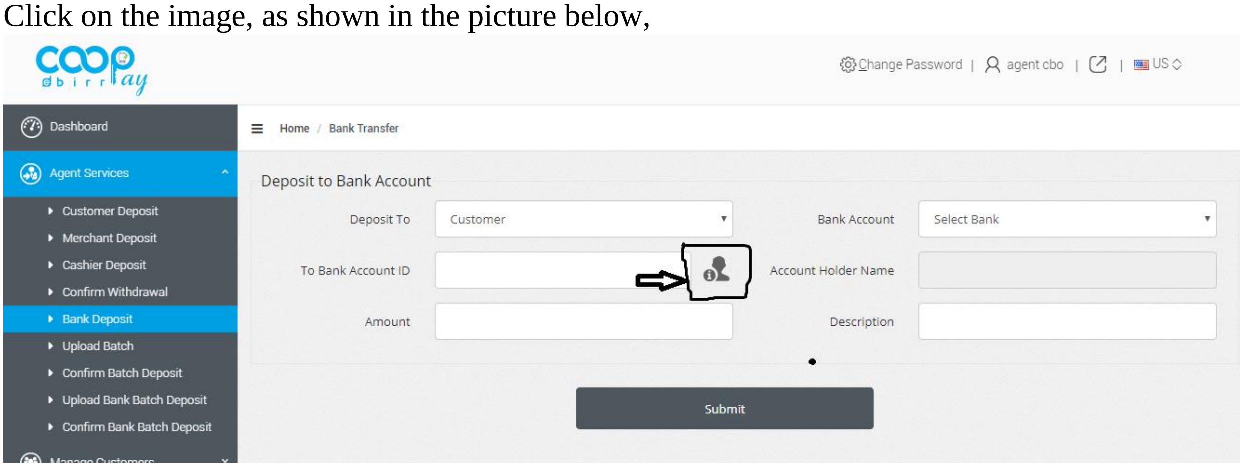


Deposit to Bank Account

This menu is used to make a direct bank deposit from coopay-ebirr to customers and murchants.
Click on Agent services
Click on Bank deposit



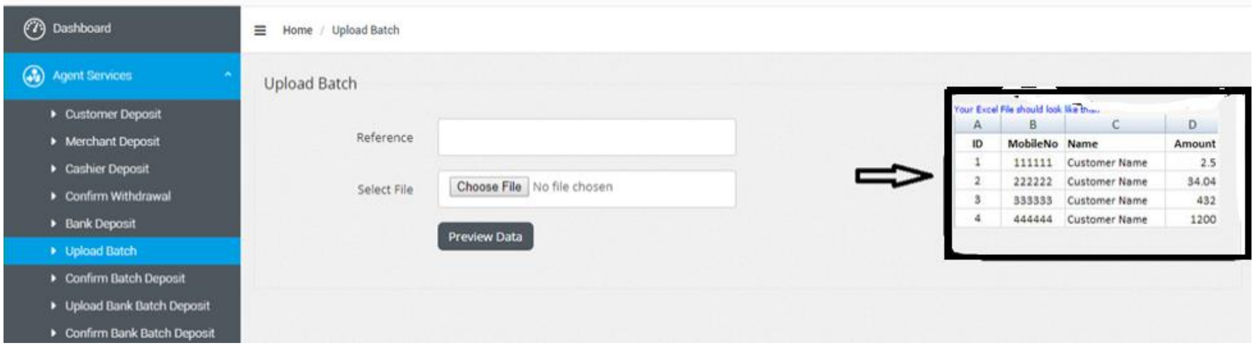
Insert Bank account number- customer or merchant CBS account number to whom it will be deposited
Click on the image, as shown in the picture below,



Account holder name will be automatically displayed for your confirmation
Insert amount
Insert description
Click Submit.

Upload Batch

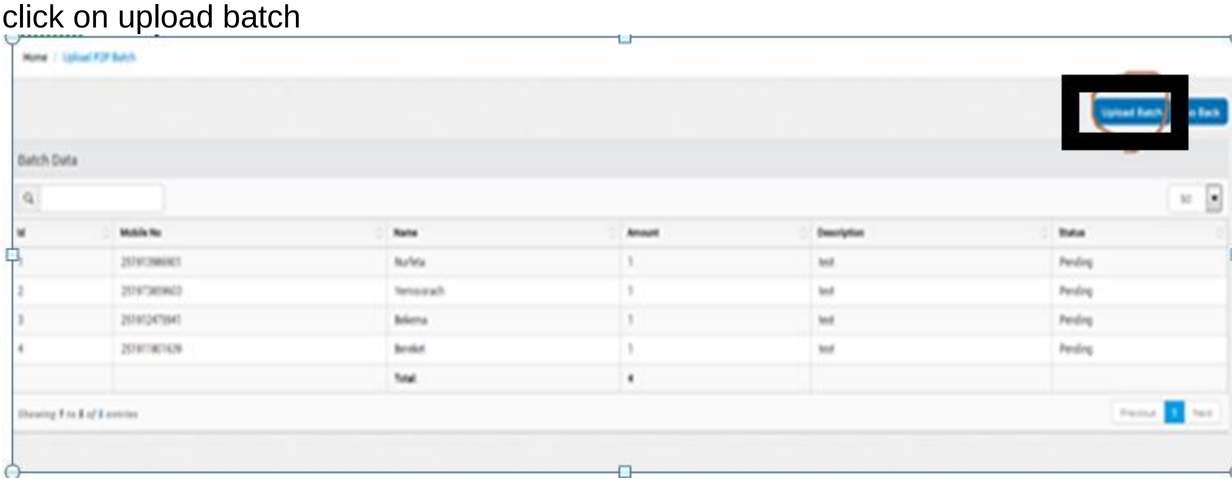
This menu is used to make multiple float deposits from one particular debit float (wallet) account.
Click on Agent services
Click on Upload Batch



Insert any reference number that you will not forget
Prepare the list of the beneficiaries (credit accounts) on excel sheet as shown in the picture above
. Format for the batch should look like;

ID	MobileNo	Name	Amount	Description
1	2519XXXXXXXX	Abebe	1	test
2	2519XXXXXXXX	Abebech	1	test
3	2519XXXXXXXX	Kebede	1	test
4	2519XXXXXXXX	Bekele	1	test

Upload the prepared excel sheet (Select file)
Click on preview data
click on upload batch



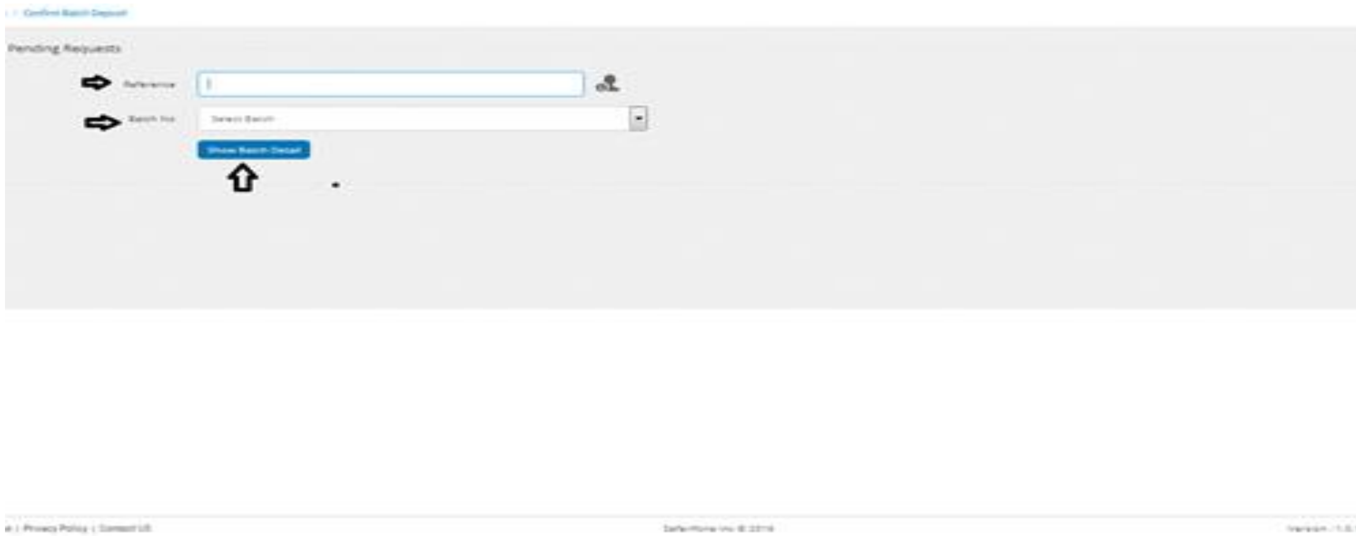
Confirm Batch Deposit

- ❖ Uploaded batch should be confirmed to effect payment.

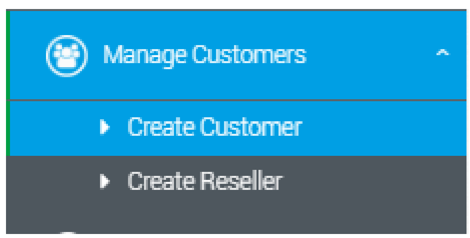
To confirm batch,

- ➢ Click on confirm batch deposit

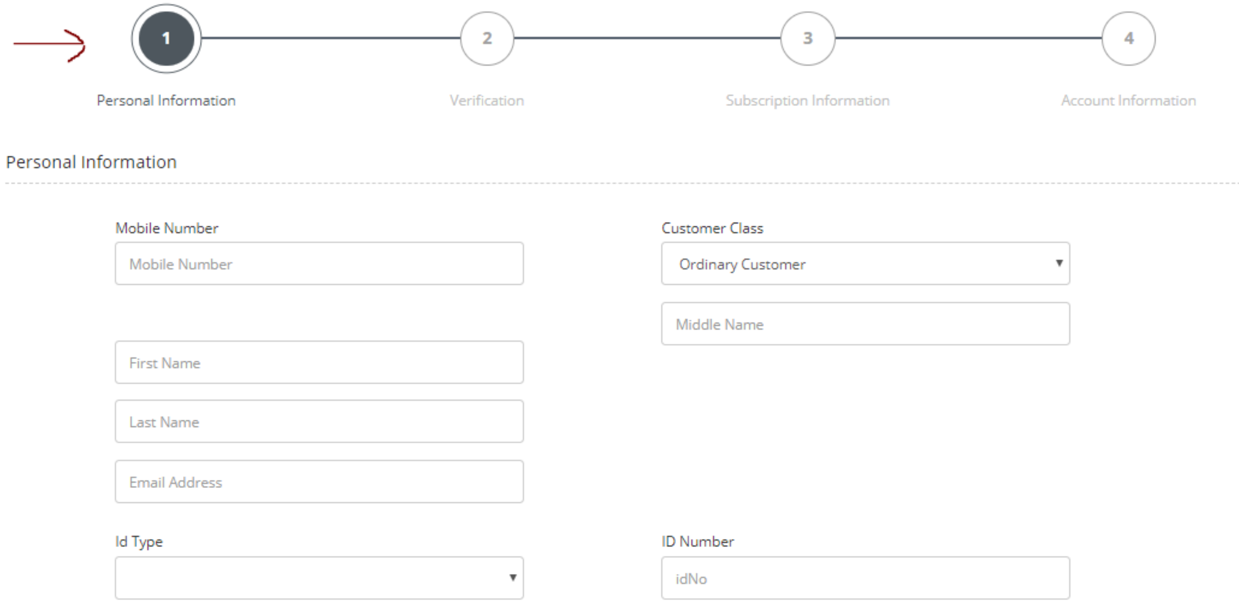
- Enter reference number
- Enter batch number
- Click on show batch detail and confirm

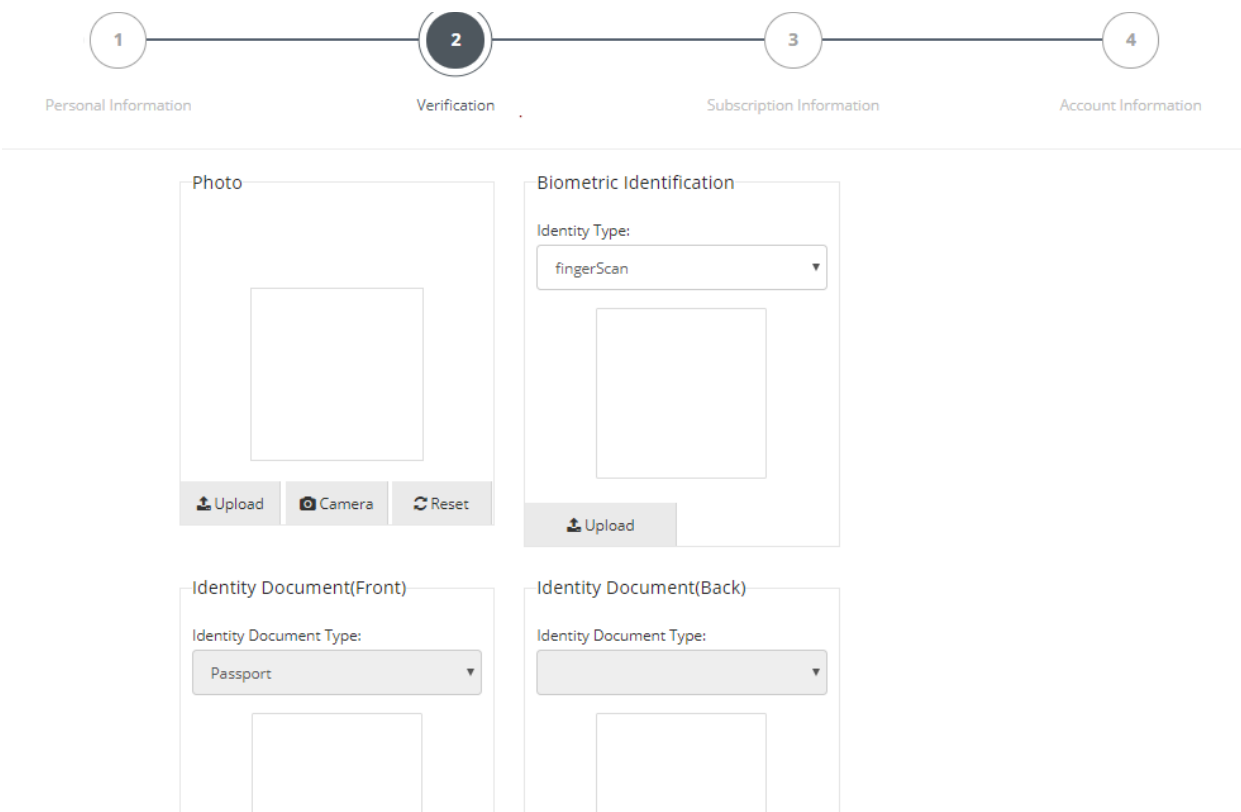


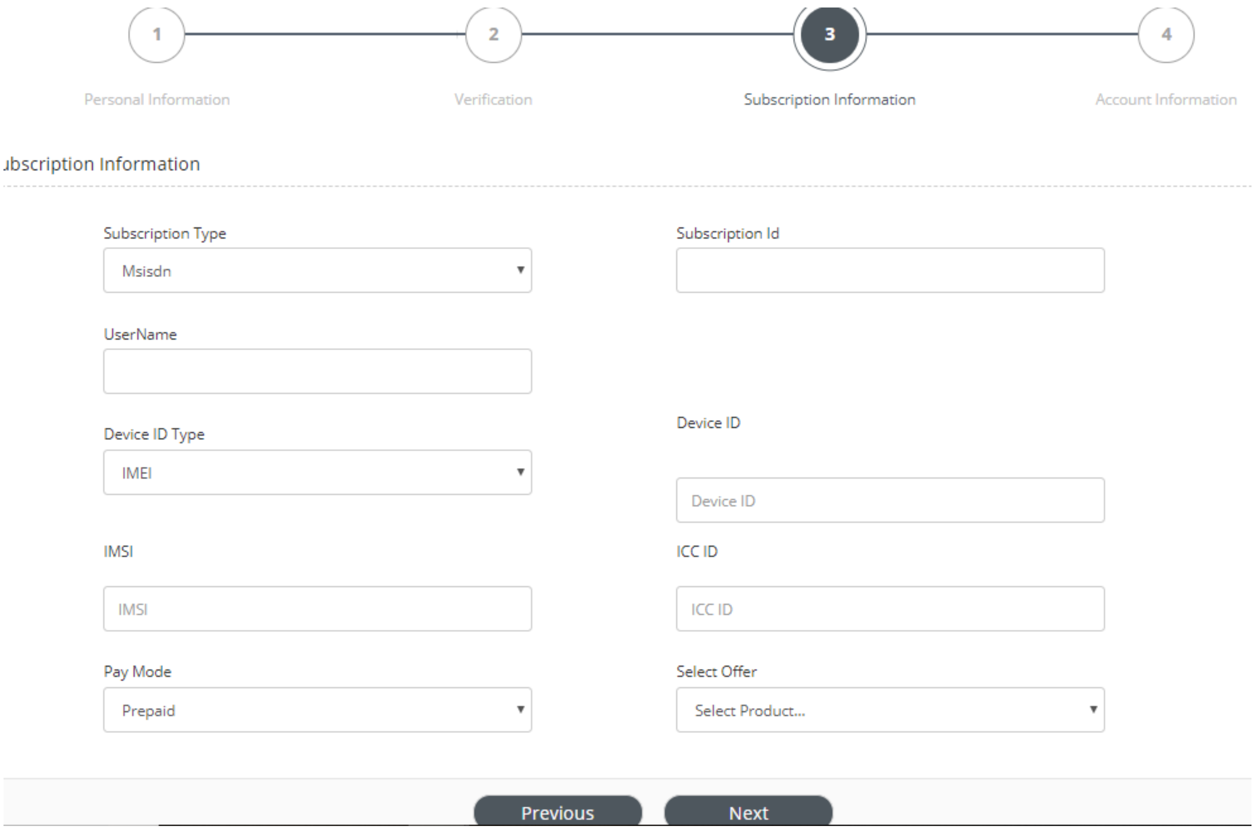
To create customers and resellers,

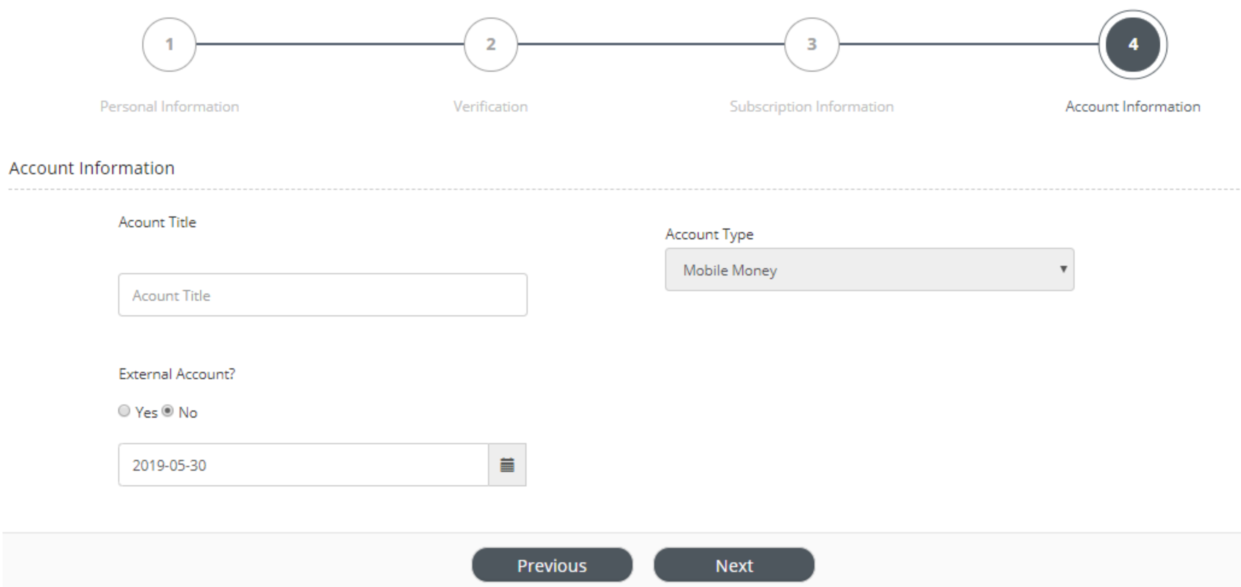


- Select create customers option from customer management menu
- Insert Personal Information and click on next
- Enter verification documents if any and click on next
- Enter customer subscription information and click next
- Insert account information and click on create customer.
  Refer the screen shots below.


1
2
3
4
Personal Information
Verification
Subscription Information
Account Information
Personal Information
Mobile Number
Mobile Number
Customer Class
Ordinary Customer
Middle Name
First Name
Last Name
Email Address
Id Type
ID Number
idNo


1
2
3
4
Personal Information
Verification
Subscription Information
Account Information
Photo
Upload
Camera
Reset
Biometric Identification
Identity Type:
fingerScan
Upload
Identity Document(Front)
Identity Document Type:
Passport
Identity Document(Back)
Identity Document Type:





New Local Transfers

To send new local transfer

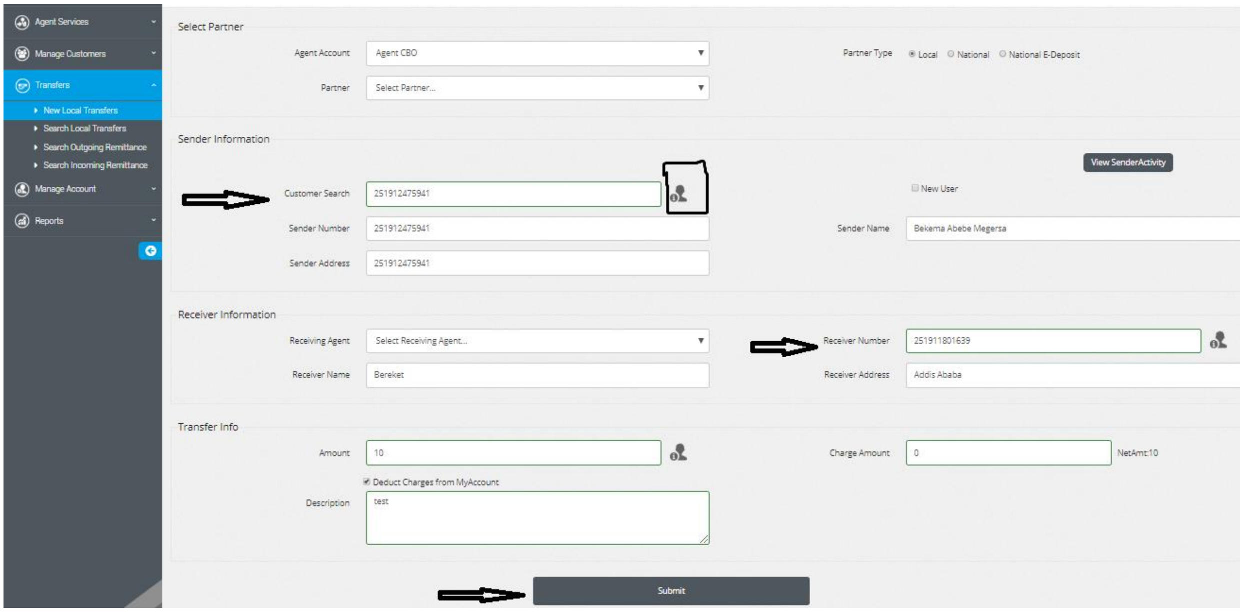
Click on Transfers, New local transfers

Enter the senders' number and click on the picture icon

Enter the receiver's number and click on the picture icon

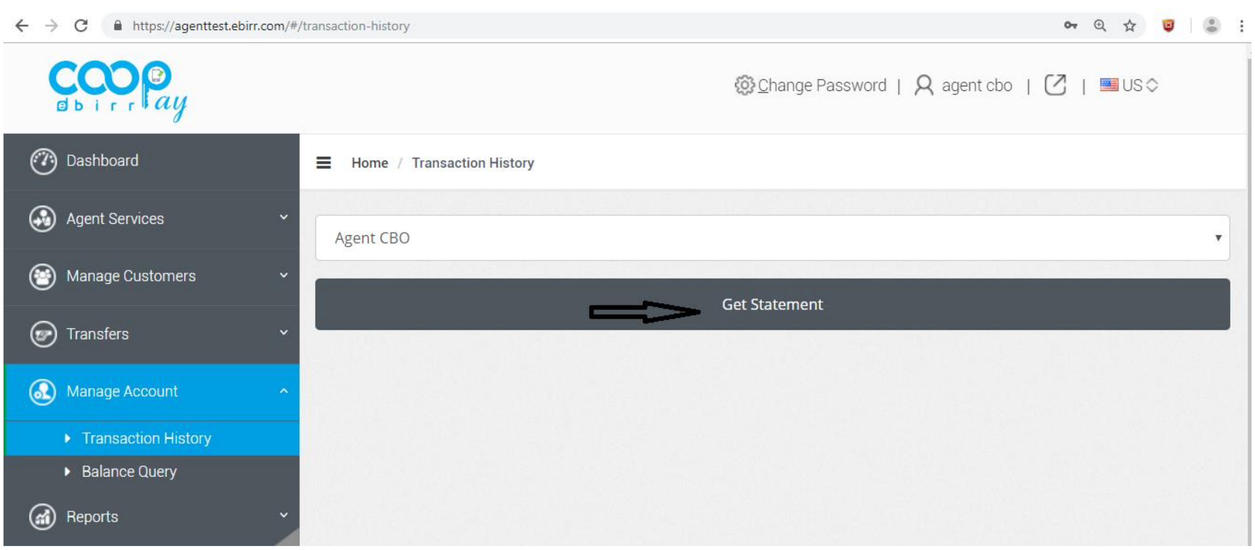
Enter amount

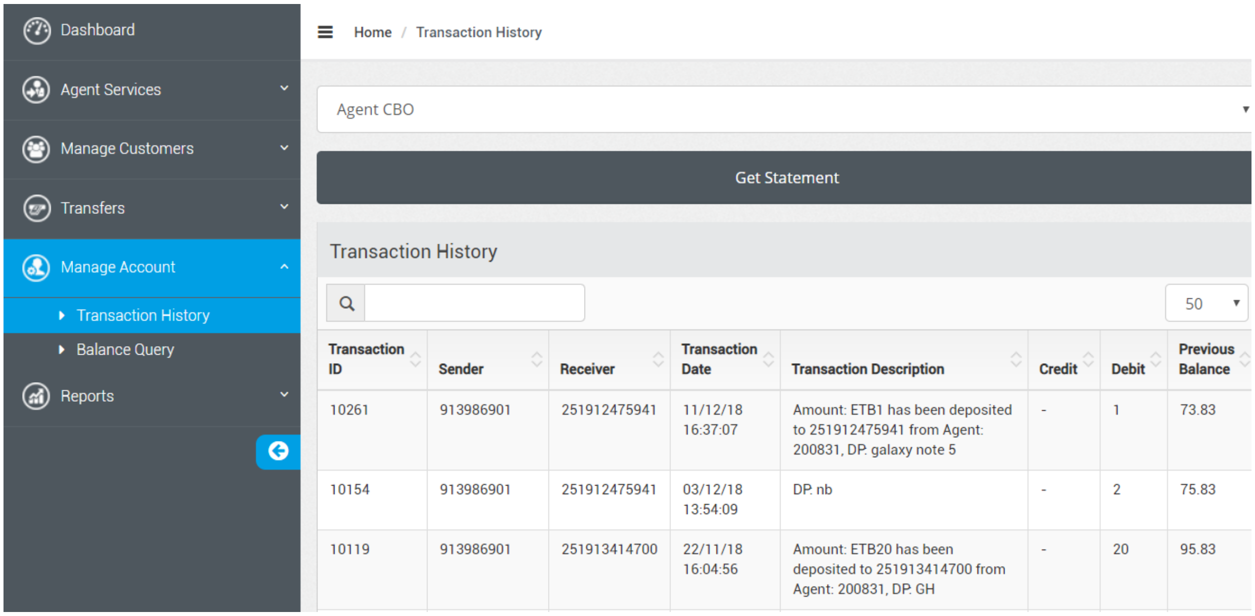
Click submit



To query agent balance and transaction history;

- Query teller transaction history under manage account
- Select transaction history
- Select teller name, and
- Click Get Statement
- Teller transaction statement will be displayed.





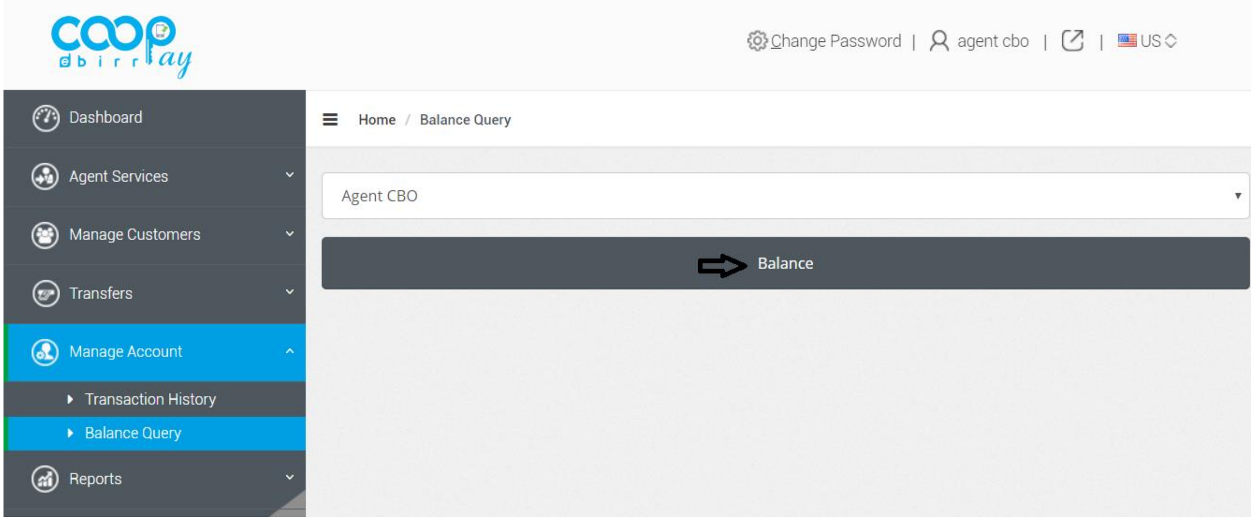
To see teller balance

Click on Mange account

Select Balance query

Select teller name

Click on "Balance" and teller's balance will be displayed



Reports

Reports can display different kinds of subscriber's transaction by time range and account types.