



# **M-PESA C2B (Pay Bill) Operating Manual**

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## 1 INTRODUCTION

Welcome to the M-PESA customer to Business facility (C2B) also known as pay bill.

This facility will enable your organization to receive payments from individual M-PESA customers and proceed to make a business withdrawal (transfer the funds you have received to your bank account).

Access to the M-PESA web system will enable you to monitor the payments that will come through to your account.

You will be able to download a statement which is a record of payments received. The M-PESA web system is also used to settle the costs of transactions (where applicable) that come through to your business number then make a withdrawal request.

The login credentials that you have been supplied with are to be treated as private and confidential.

## 2 M-PESA WEB BROWSER CERTIFICATE APPLICATION PROCESS

To access the M-PESA website, the user must first install a digital M-PESA web browser certificate in the computer. The digital certificate enables an authorized M-PESA user to view the M-PESA website. The correct M-PESA URL is (<https://www.m-pesa.com/ke>)-One certificate is valid per user profile.

The process is as follows:-

- Certificate Application
- Certificate Installation

Note that the application must be made on:-

- Windows explorer version 7 or above as your browser and NOT Mozilla Firefox.
- Windows XP as your Operating System and NOT Windows Vista.

### **Step1:**



- 
- Load the page <https://vmtke.ca.vodafone.com/certsrv> confirm correct URL and use these particulars to login.
    - Username: **kecertenroll**
    - Password: **\*\*\*\*\*** (changes on a weekly basis)
  - In the form labeled **Submit New Request**; fill in ALL the details accurately then submit.
  - You will get a confirmation that your application has been received and you must wait for an administrator to issue the certificate you requested. You will also be advised to return to the web site in a day or two to retrieve the certificate.
  - The request ID will be given; please note down the number for reference.

**Note** that NO alerts will be sent once the certificate has been issued. You will need to go back to the website within 10 days to download and install the certificate.

**Step2:**

- Load the page <https://vmtke.ca.vodafone.com/certsrv> and login.
- Click on **View** the status of a pending certificate request.
- If the certificate has been issued, click on it then install otherwise a prompt will tell you to wait for the certificate to be issued by the administrator.
- Normally the administrator issues certificates between Mondays and Fridays from 8am-5pm.
- In case of a query on the same, kindly send an email to: [m-pesabusiness@safaricom.co.ke](mailto:m-pesabusiness@safaricom.co.ke) stating the request ID (certificate number) and the organization name.



### **3 WEB ACCESS GUIDELINES**

#### **3.1 CREATION OF USER NAMES**

User names created **MUST** be users' full names as they appear on their identification cards, and not initials, nicknames or company names. For example, John Smith is correct whereas J. Smith, J.S. or John's Shop are incorrect.

#### **3.2 E-MAIL ADDRESSES**

Valid official e-mail addresses **MUST** be entered during the creation exercise.

#### **3.3 VALID WEB OPERATORS**

M-PESA users under your organization **MUST** be staff members who are in current employment with your organization. Whenever an individual leaves an organization; their web access **MUST** be immediately closed. Operator accounts that have not been used for 60 days are considered inactive and **MUST** be closed.

#### **3.4 NUMBER OF USERNAMES PER OPERATOR**

Organizations **MUST** have at least 2 web operators to allow for initiating and finalizing of transactions. One individual **MUST** not have two or more user names.

#### **3.5 MAKER AND CHECKER**

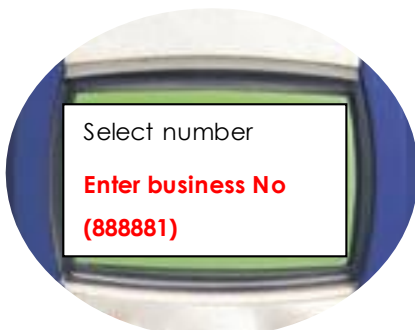
Organizations should have a maker and checker as separate individuals, one individual having two accounts is not allowed.

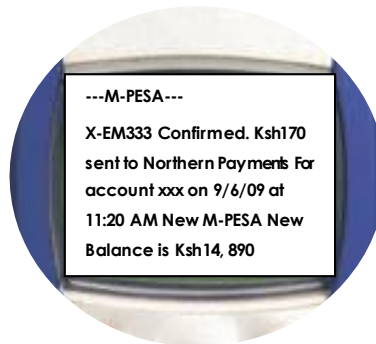
### **4 CUSTOMER PAYMENTS**

Payments to businesses via M-PESA can only be made by registered M-PESA customers.

- Customer makes payments by scrolling down to **M-PESA** on the phone.
- The customer then chooses **Lipa na M-PESA** from the M-PESA menu
- Customer selects **Pay Bill**
- Customer enters the **Business Number**
- Customer enters the **Account Number**

- Customer enters the **Amount**
- Customer enters their **M-PESA PIN** and presses **OK**
- A summary page appears which shows the details of the customer's payments.
- The customer is expected to **OK** the summary before the payment can be sent.





## 5 ACCOUNT TYPES IN C2B ORGANIZATION

An M-PESA C2B organization has three accounts:

### 5.1 MMF ACCOUNT FOR ORGANIZATION

When an organization wants to make a business withdrawal, the funds are transferred to this account before the withdrawal request is made.

### 5.2 UTILITY ACCOUNT

Payments from customers are credited into the utility account.

### 5.3 CHARGES PAID ACCOUNT

For payments received from customers, depending on the tariff, a charge is levied on the Organization or is split between the organization and the customer. The charges paid account is debited and always accrues a negative balance which has to be settled before an organization can make a withdrawal request.

### 5.4 ORGANIZATION SETTLEMENT ACCOUNT

This account does the calculations for the organization operator when s/he initiates a revenue settlement. This account settles the charges paid account and then moves the balance from the Utility Account to the MMF account automatically. You will notice that the transaction type "Move funds from Utility to MMF" is no longer available as the revenue settlement process takes care of this.

## 6 CREATION OF A WEB OPERATOR

### Why perform this action?

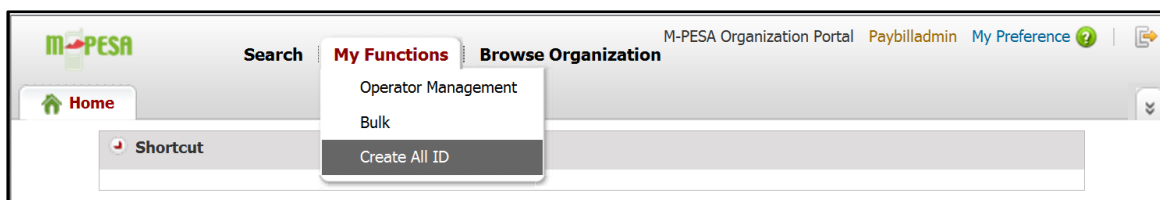
The M-PESA Web system is designed to have a 'maker' (Initiating Operator) and a 'checker' (Finalizing Operator) for completion of any transaction done via web.

The **administrator** is created by Safaricom IT and given the mandate to create other operators within the organization platform.

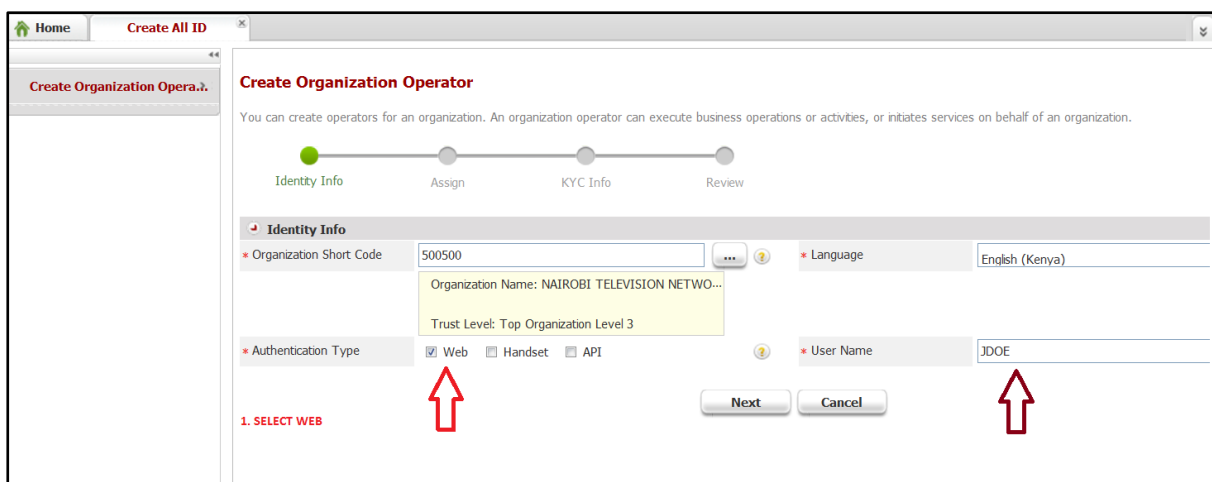
### What to expect?

At the end of this action, the organization will have an operator who will be able to transact in regard to their role within the system.

Administrator logs in M-PESA Portal > Select **My Functions** > Select **Create All ID**



The **Create Organization Operator** page will open at the **Identity Info** stage as shown below.

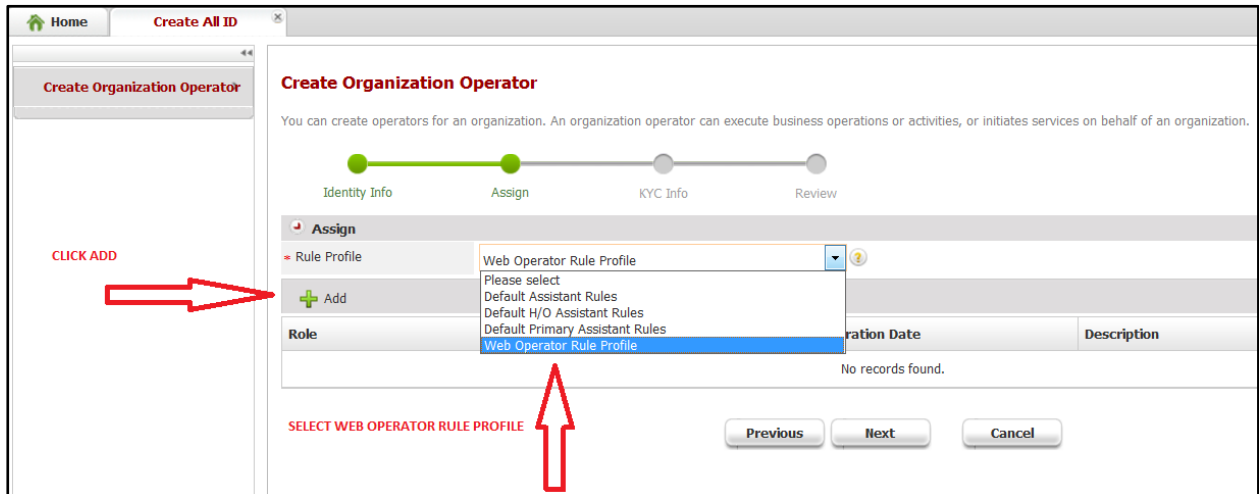
A screenshot of the 'Create Organization Operator' page. The page title is 'Create Organization Operator'. Below the title is a progress bar with four stages: 'Identity Info' (active), 'Assign', 'KYC Info', and 'Review'. The 'Identity Info' stage is expanded, showing fields for 'Organization Short Code' (500500), 'Language' (English (Kenya)), 'Authentication Type' (Web, Handset, API), and 'User Name' (JDOE). A tooltip is visible over the 'Organization Short Code' field, showing 'Organization Name: NAIROBI TELEVISION NETWO...' and 'Trust Level: Top Organization Level 3'. Red arrows point to the 'Web' checkbox under 'Authentication Type' and the 'JDOE' text in the 'User Name' field. The page also includes 'Next' and 'Cancel' buttons.



Select Authentication type as **Web** and enter the preferred **Username**

Select **Next**

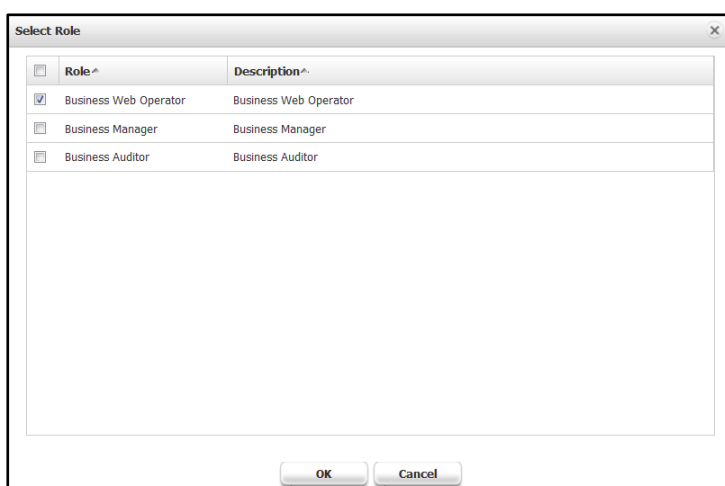
The **Create Organization Operator** page will open at the **Assign** stage as shown below.



- Click on the drop down arrow on **Rule Profile** and select **Web Operator Rule Profile**.
- Click on **ADD**

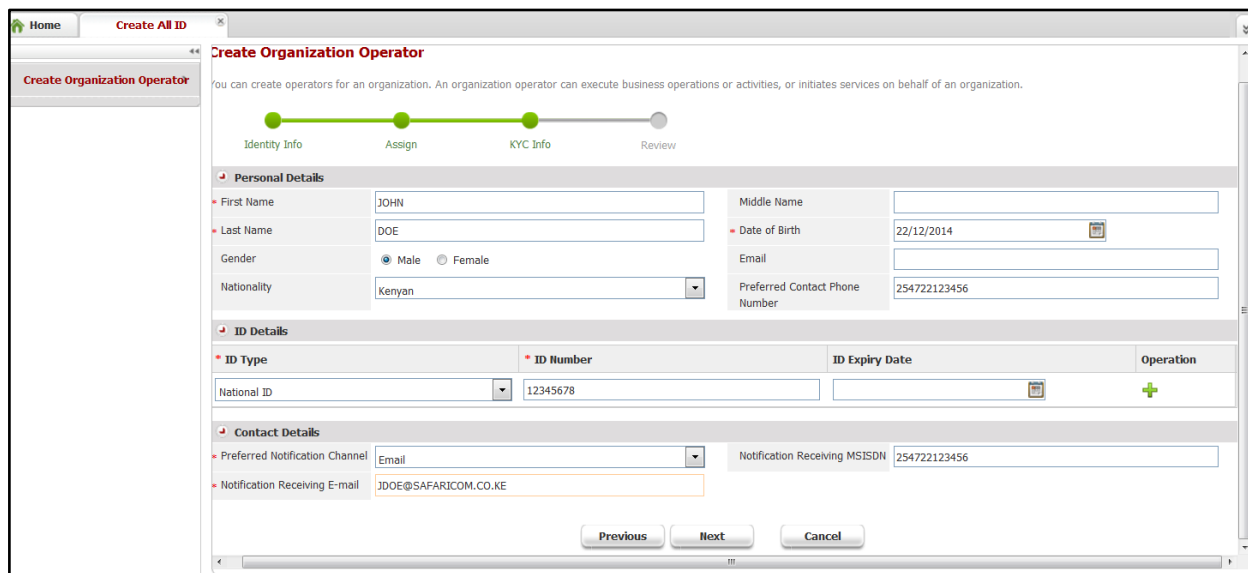
A **Select Role** pop up window will appear as shown below.

- Select the desired role and click **OK** and then click on **Next**



The **Create Organization Operator** page will open at the **KYC Info** stage as shown below.

- Fill in the Mandatory details and select **Next**



**Create Organization Operator**

You can create operators for an organization. An organization operator can execute business operations or activities, or initiates services on behalf of an organization.

Progress: Identity Info → Assign → **KYC Info** → Review

**Personal Details**

First Name: JOHN, Middle Name: , Last Name: DOE, Date of Birth: 22/12/2014, Gender: ☒ Male ☐ Female, Nationality: Kenyan, Email: , Preferred Contact Phone Number: 254722123456

**ID Details**

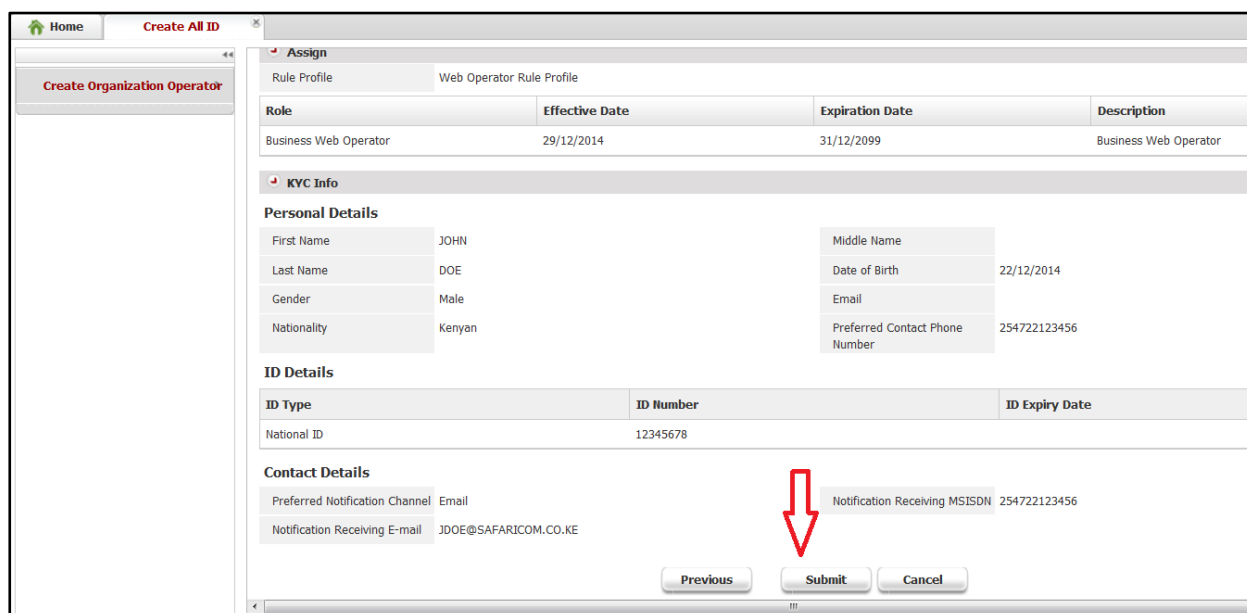
ID Type	ID Number	ID Expiry Date	Operation
National ID	12345678		<a href="#">+</a>

**Contact Details**

Preferred Notification Channel: Email, Notification Receiving MSISDN: 254722123456, Notification Receiving E-mail: JDOE@SAFARICOM.CO.KE

Buttons: Previous, **Next**, Cancel

The **Create Organization Operator** page will open at the **Review** stage as shown below. Confirm the details and click on **Submit**



**Create Organization Operator**

Progress: Identity Info → Assign → KYC Info → **Review**

**Assign**

Rule Profile: Web Operator Rule Profile

Role	Effective Date	Expiration Date	Description
Business Web Operator	29/12/2014	31/12/2019	Business Web Operator

**KYC Info**

**Personal Details**

First Name: JOHN, Middle Name: , Last Name: DOE, Date of Birth: 22/12/2014, Gender: Male, Nationality: Kenyan, Email: , Preferred Contact Phone Number: 254722123456

**ID Details**

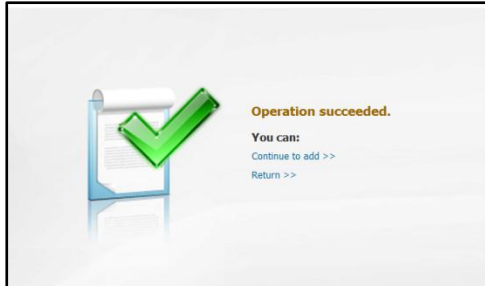
ID Type	ID Number	ID Expiry Date
National ID	12345678	

**Contact Details**

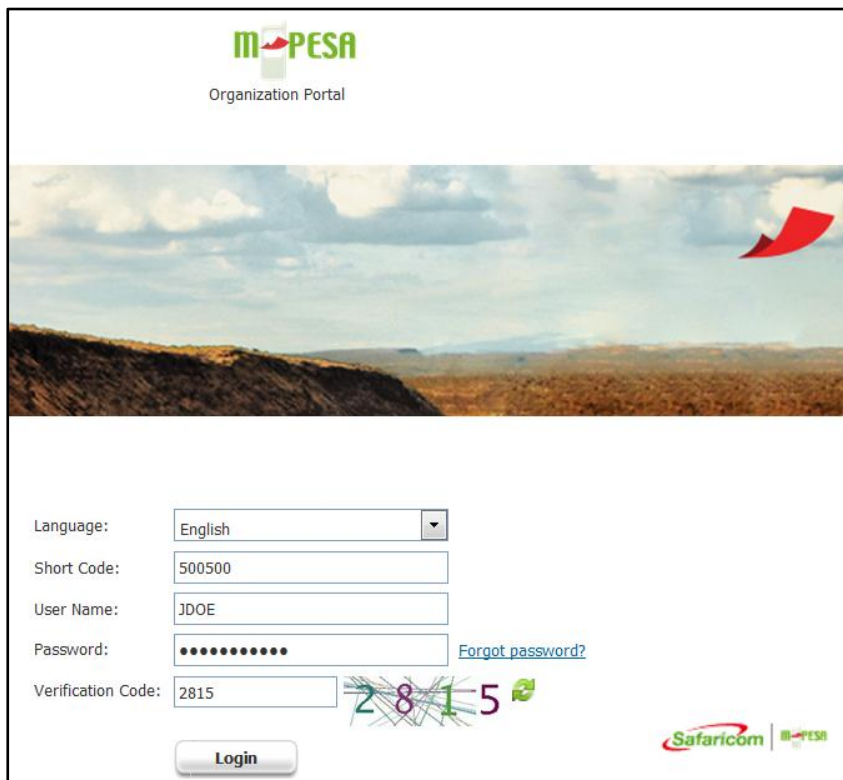
Preferred Notification Channel: Email, Notification Receiving MSISDN: 254722123456, Notification Receiving E-mail: JDOE@SAFARICOM.CO.KE

Buttons: Previous, **Submit**, Cancel

- You can continue to create other users as per below

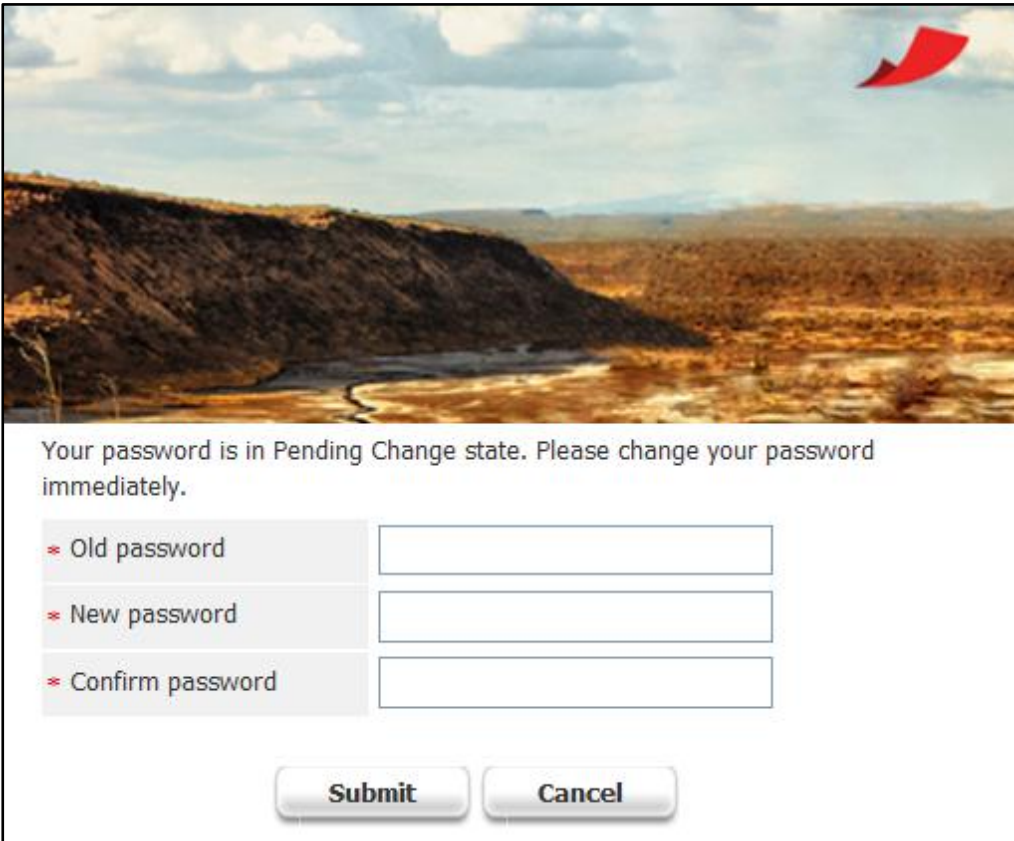


- Log-in to M-PESA System using the newly created credentials as below



- Upon Log in, the system will prompt you to change your password as below

(Note the requirement is that the password must be a strong password with a minimum of 8 alphanumeric characters, that is, with a mix of small, capital letters and or a special character e.g. Password01%)



Your password is in Pending Change state. Please change your password immediately.

\* Old password

\* New password

\* Confirm password

## 7 FUNDSTRANSFER

### 7.1 Revenue Settlement

#### *Why perform this action?*

An organization will have to settle the business charge before they can make a withdrawal of the funds they have received from their clients.

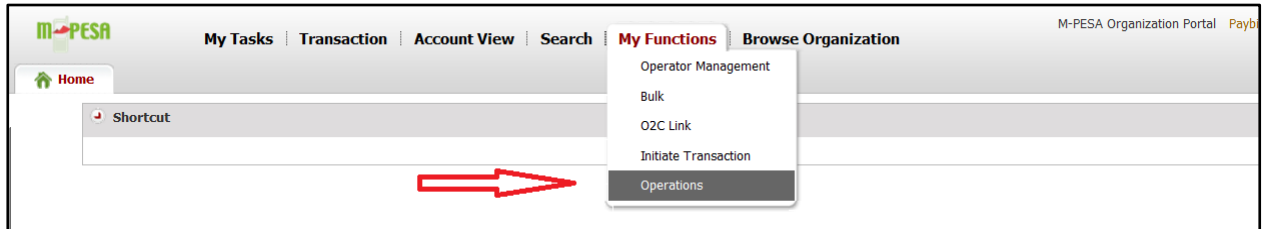
#### **1 Start Here**

Log-in to M-PESA System as an Operator or Business Manager.

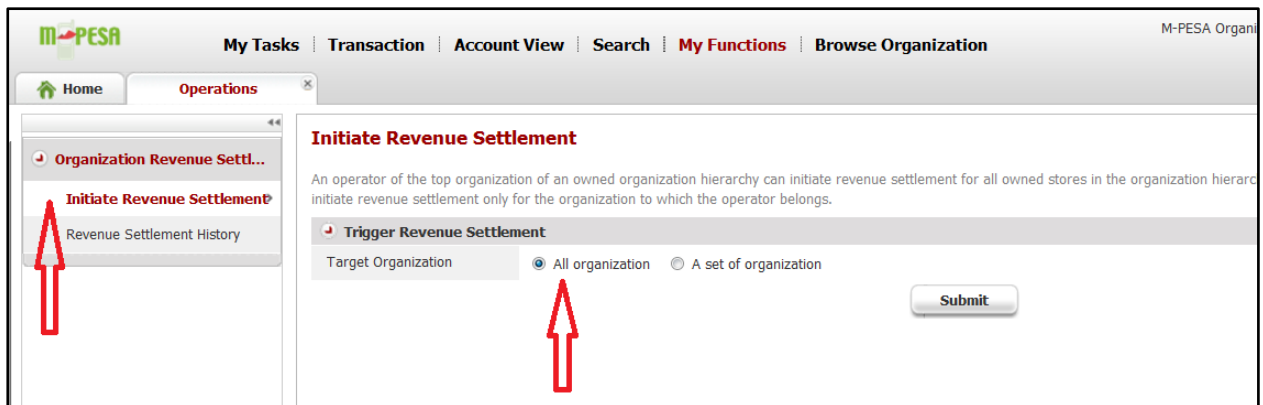
#### **Procedure:**

- Organization Operator selects **My Functions**

- Click on **Operations**



- Select **Initiate Revenue Settlement** > All Organization



- Select **Submit**.
- The transaction is processed and another operator (business manager) needs to log in and approve the settlement.

To approve the Revenue Settlement, log in as a manager:

- Select **Browse Organization**
- Select **Task List**
- Click on the **Operation icon** that is alongside the settlement you want to approve



**M-PESA** My Tasks | Transaction | Account View | Search | My Functions | **Browse Organization** M-PESA Organization Portal Paybillmanager My Preference

Home Account View Operations **Browse Organization**

**Task List** STEP 1 **500500 - NAIROBI TELEVISION NETWORK(Active)** STEP 3

You can query or execute manual tasks related to the organization. Tasks are triggered during service operations related to the organization.

Task No.	Description	Prior...	Creation Tl...	Due Time	Initiator	Status	Category	Operation
1LUGOCFNQ	Manually Initiate Organization Revenue Settlement '...	Medium	30/12/2014 1...	01/01/2037 0...	NAIROBI TELEVI...	Processing	Business Operati...	
1KSF0BOR3	Manually Initiate Organization Revenue Settlement '...	Medium	28/11/2014 1...	01/01/2037 0...	NAIROBI TELEVI...	Completed	Business Operati...	
1KSC0BOQ6	Manually Initiate Organization Revenue Settlement '...	Medium	28/11/2014 1...	01/01/2037 0...	NAIROBI TELEVI...	Rejected	Business Operati...	
1KOB0BD3J	Manually Initiate Organization Revenue Settlement '...	Medium	24/11/2014 1...	01/01/2037 0...	NAIROBI TELEVI...	Completed	Business Operati...	
1KLF0AR1R	Manually Initiate Organization Revenue Settlement '...	Medium	21/11/2014 0...	01/01/2037 0...	NAIROBI TELEVI...	Completed	Business Operati...	

Total records: 5 10 records 1/1 Go

Overview  
Organization Info  
O2C Link  
O2O Link  
Tills  
**Task List**  
Audit Log  
Organization Transaction  
Initiate Transaction  
Review Transaction

Select **Approve** > Enter **reason** > Click on **Submit**

Home Browse Organization **Approve 'Manually...'**

**Approve 'Manually Initiated Organization Revenue Settlement'**

Basic Info

Task Specific Info

Account

Settlement Type	Account No.	Account Type	Available Balance	Reserved Balance	Unclear Balance
Working	500000000110331823	MMF Account for Organization	KSH 1,837,172.00	KSH 0.00	KSH 0.00
Settlement	500000000110331856	Organization Settlement Account	KSH 0.00	KSH 0.00	KSH 0.00
Revenue	500000000110331831	Utility Account	KSH 0.00	KSH 0.00	KSH 4,490.00
Liability	500000000110331849	Charges Paid Account	KSH 0.00	KSH 220.00	KSH 0.00

Revenue Settlement Configuration

Settlement Plan

Basic Info

Plan ID: 8016 Status: Prepared

Settlement Account: Organization Settlement Account Organization Short Code: 200777

Organization Name: PAYBILLMERU

Settlement Entries

Task Processing

Action: ☒ Approve ☐ Reject

Comments: Settlement for 13th Jan

A **Confirm** pop up window will appear as shown below, select **Yes**

**Confirm**

Are you sure to submit?



---

## 7.2 Withdrawing funds from M-PESA

### ***Why perform this action?***

An organization will want to withdraw funds they have received from their customers.

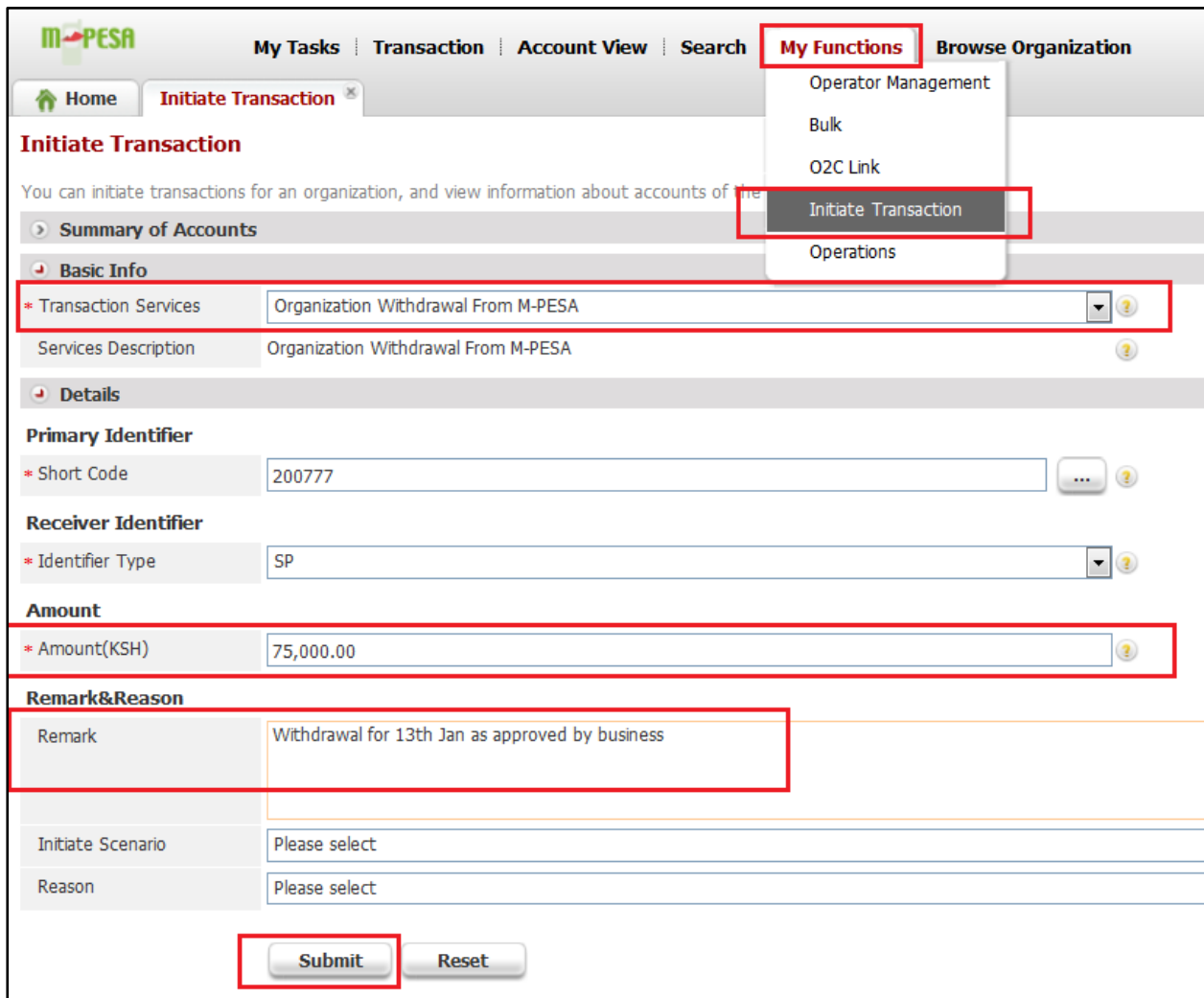
### ***What to expect?***

At the end of this action, the M-PESA Finance team in Safaricom will have an action to perform a funds transfer to the organization's nominated Bank Account.

### ***Start Here***

Log-in to M-PESA System the Business Manager of your organization.

- ✓ Select **My Functions**
- ✓ Select **Initiate Transaction**
- ✓ Select **Transaction Services** as **Organization Withdrawal from M-PESA**
- ✓ Enter the **Amount**
- ✓ Enter the **Remark** and **Reason**
- ✓ Select **Submit**



**M-PESA** My Tasks | Transaction | Account View | Search | **My Functions** | Browse Organization

Home **Initiate Transaction**

**Initiate Transaction**

You can initiate transactions for an organization, and view information about accounts of the

Summary of Accounts

Basic Info

\* Transaction Services Organization Withdrawal From M-PESA

Services Description Organization Withdrawal From M-PESA

Details

**Primary Identifier**

\* Short Code 200777

**Receiver Identifier**

\* Identifier Type SP

**Amount**

\* Amount(KSH) 75,000.00

**Remark&Reason**

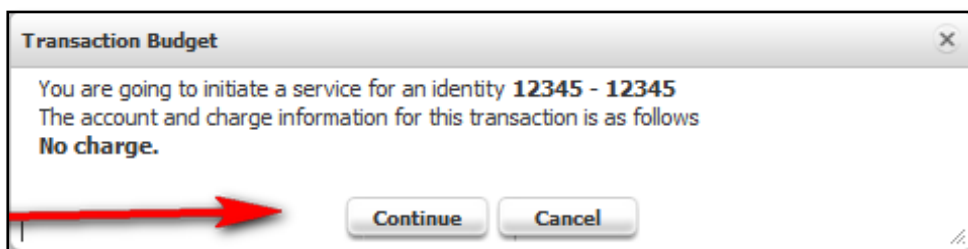
Remark Withdrawal for 13th Jan as approved by business

Initiate Scenario Please select

Reason Please select

**Submit** Reset

The **Transaction Budget** pop up window will appear. Click on **Continue**



**Transaction Budget**

You are going to initiate a service for an identity **12345 - 12345**  
The account and charge information for this transaction is as follows  
**No charge.**

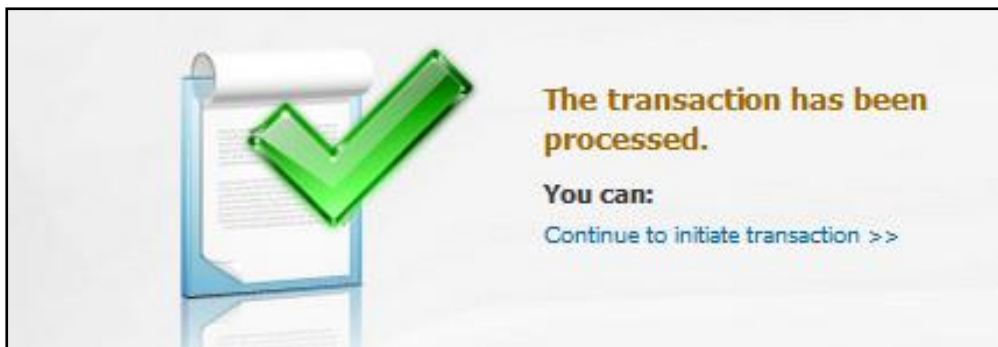
**Continue** **Cancel**





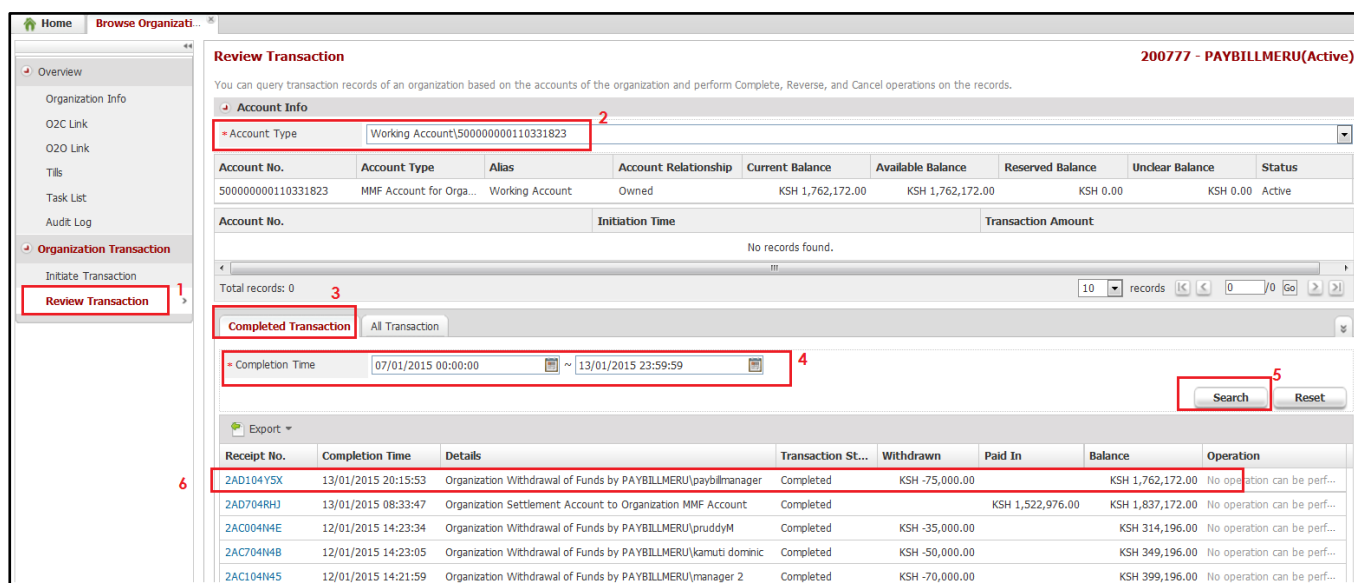
If the transaction request is successful, this creates a **Task** for a Finance Operator at M-PESA Safaricom to action approval for the withdrawal (this is not a maker-checker transaction). The organization has no further action to perform.

There will be a completed transaction in the organization's M-PESA Account, which will be confirmed once the Safaricom M-PESA Finance team has actioned the funds transfer.



**Note-** To check the status of the organization withdrawal of funds transaction, an operator will go to **Browse Organization**,

1. Select **Review Transaction**
2. Select the **Account Type** as **Working account**
3. Select **Completed Transactions**
4. Define the **Date** range
5. Select **Search**
6. The transaction populates on the statement as shown below



**Review Transaction** 200777 - PAYBILLMERU(Active)

You can query transaction records of an organization based on the accounts of the organization and perform Complete, Reverse, and Cancel operations on the records.

**Account Info**

\* Account Type: Working Account(500000000110331823) 2

Account No.	Account Type	Alias	Account Relationship	Current Balance	Available Balance	Reserved Balance	Unclear Balance	Status
500000000110331823	MMF Account for Orga...	Working Account	Owned	KSH 1,762,172.00	KSH 1,762,172.00	KSH 0.00	KSH 0.00	Active

**Transaction Amount**

No records found.

Total records: 0 3

**Completed Transaction** All Transaction

Completion Time: 07/01/2015 00:00:00 ~ 13/01/2015 23:59:59 4

5 Search Reset

Export

Receipt No.	Completion Time	Details	Transaction St...	Withdrawn	Paid In	Balance	Operation
2AD104YSX	13/01/2015 20:15:53	Organization Withdrawal of Funds by PAYBILLMERU/paybillmanager	Completed	KSH -75,000.00		KSH 1,762,172.00	No operation can be perf...
2AD704RHJ	13/01/2015 08:33:47	Organization Settlement Account to Organization MMF Account	Completed		KSH 1,522,976.00	KSH 1,837,172.00	No operation can be perf...
2AC004N4E	12/01/2015 14:23:34	Organization Withdrawal of Funds by PAYBILLMERU/pruddyM	Completed	KSH -35,000.00		KSH 314,196.00	No operation can be perf...
2AC704N4B	12/01/2015 14:23:05	Organization Withdrawal of Funds by PAYBILLMERU/kamuti dominic	Completed	KSH -50,000.00		KSH 349,196.00	No operation can be perf...
2AC104N45	12/01/2015 14:21:59	Organization Withdrawal of Funds by PAYBILLMERU/manager 2	Completed	KSH -70,000.00		KSH 399,196.00	No operation can be perf...

## 8 VIEWING STATEMENTS ON M-PESA

### Why perform this action?

To avail statements if need be for the organization. Every six months the data is archived but data can be availed upon request via email to;

[M-PESABusiness@Safaricom.co.ke](mailto:M-PESABusiness@Safaricom.co.ke)

### Start Here

Log-in to M-PESA System as an Operator or Manager.

### Procedure:

1. Select **Browse Organization**
2. Select **Review Transaction**
3. Select **Account Type**
4. Select any of the Transaction Status tabs
5. Select the Date Range
6. Click **Search**
7. Select **Export** and select the desired format



**Review Transaction**

You can query transaction records of an organization based on the accounts of the organization and perform Complete, Reverse, and Cancel operations on the records.

**Account Info**

Account Type: Working Account(500000000110331823)

Account No.	Account Type	Alias	Account Relationship	Current Balance	Available Balance	Reserved Balance	Unclear Balance	Status
500000000110331823	MMF Account for Orga...	Working Account	Owned	KSH 1,762,172.00	KSH 1,762,172.00	KSH 0.00	KSH 0.00	Active

Account No. Initiation Time Transaction Amount

No records found.

Total records: 0

**Completed Transaction** All Transaction

Completion Time: 07/01/2015 00:00:00 ~ 13/01/2015 23:59:59

Search Reset

Export

Completion Time	Details	Transaction St...	Withdrawn	Paid In	Balance	Operation
07/01/2015 20:15:53	Organization Withdrawal of Funds by PAYBILLMERU/paybillmanager	Completed	KSH -75,000.00		KSH 1,762,172.00	No operation can be perf...
07/01/2015 08:33:47	Organization Settlement Account to Organization MMF Account	Completed		KSH 1,522,976.00	KSH 1,837,172.00	No operation can be perf...
07/01/2015 14:23:34	Organization Withdrawal of Funds by PAYBILLMERU/pruddyM	Completed	KSH -35,000.00		KSH 314,196.00	No operation can be perf...
12/01/2015 14:23:05	Organization Withdrawal of Funds by PAYBILLMERU/kamuti dominic	Completed	KSH -50,000.00		KSH 349,196.00	No operation can be perf...

## 9 REVERSING TRANSACTION(S)

### Why perform this action?

To refund erroneous pay bill payments to customers

### Start Here

Log-in to M-PESA System as an Operator or Manager.

- ✓ Select **Browse Organization**
- ✓ Select **Initiate Reversal**
- ✓ Enter the **receipt number** and click **Search**, enter the **Reason** for reversing and **Submit**

### OR

- ✓ Select **Browse Organization**
- ✓ Select **Review Transaction**
- ✓ Select **Account Type** as **Utility Account**
- ✓ Select **Completed Transactions**
- ✓ Alongside the transaction you want, click on the [reverse](#) hyperlink in blue, enter the **Reason** for reversing and select **Submit**

### What to expect?

At the end of this action, the status if completed, then the client receives a confirmation message alerting him/her that the funds have been credited back to their M-PESA account.



M-PESA Organization Portal | paybilloperator | My Preference

My Tasks | Account View | Search | My Functions | **Browse Organization**

Home | Browse Organization

**Initiate Reversal** 200777 - PAYBILLMERU(Active)

You can query the transaction log by Receipt No. and reverse completed organization transactions. After a transaction is reversed, the system will display transaction reversal log.

**Search for Transaction Log**

\*Receipt No.

**Transaction Details**

**Reference Data**

**Account Entries**

Identity Type	Identity	Account	Reason Typ...	Details	Transaction Amou...	Available Balance	Running Balance
Organization	200777 - PAYBILLMERU	Charges Paid Acco...	Pay Bill via Web	Pay Bill Charge	KSH -55.00	KSH -1,210.00	KSH -770.00
Organization	200777 - PAYBILLMERU	Utility Account(500...	Pay Bill via Web	Pay Bill from 254707162277 - MERCY DO...	KSH 130.00	KSH 1,515,646.00	KSH 1,515,646.00

**Audit Log**

**System Interaction Log**


Reason:

Once initiated, it needs to be completed by another authorized operator i.e. the transaction should be completed by the checker

The **Confirm Operation** pop up window will appear, click on **Yes**

**Confirm Operation**

Are you sure to submit?



**The transaction has been processed, and need be approved by another operator.**

**You can:**  
[Continue to initiate transaction >>](#)

Transaction Details			
Receipt No.	2AD704Y63	?	Status Pending Authorized
Initiation Time	13/01/2015 20:46:50	?	Last Update Time
Transaction Type	Transaction Reversal	?	Reason Type Pay Utility Reversal
Initiator	PAYBILLMERU\paybilloperator	?	Initiator Type Organization Operator
Channel	WEB	?	Amount(KSH) 130.00
Remark	Customer paid to our paybill account in error. The intended pay bill number the customer wanted to pay to is: 200700		
Note			
Failure Description			

To finalize the transaction, the checker (manager role) logs in to the M-PESA system and does the following:

- Select **My Tasks**
- Select **Group Task**
- Click on **Search**
- Click on the **Operation** icon



**m-PESA** My Tasks Transaction Account View Search My Functions Browse Organization M-PESA Organization Portal paybillmanager My Preference

Home Group Task

**Group Task**

A group task is a task that is assigned to a group of users for processing. A group task has multiple potential executors. As a potential operator, you can query or process the group tasks that have been assigned to you.

Search for Group Task

Task No. Priority All

Task Type Category All

Status All Due Time

Creation Time ~

Sorting Query Results By Create Time Latest

Search

Process

Task No.	Description	Priority	Creation Time	Due Time	Initiator	Status	Category	Operation
2ADA0E95W	Transaction Reversal '2AD704Y63'	Medium	13/01/2015 20:46:50	01/01/2037 00:00:00	PAYBILLMERU\paybilloperator	Processing	Transaction and Action	

Total records: 1

The **Transaction Confirmation** page opens and the transaction is then approved as shown below.

**m-PESA** My Tasks Transaction Account View Search My Functions Browse Organization M-PESA Organization Portal paybillmanager My Preference

Home Transaction Confirmation

**Transaction Confirmation**

Basic Info

Task Specific Info

Transaction Details

Receipt No.	2AD704Y63	Status	Pending Authorized
Initiation Time	13/01/2015 20:46:50	Last Update Time	
Transaction Type	Transaction Reversal	Reason Type	Pay Utility Reversal
Initiator	PAYBILLMERU\paybilloperator	Initiator Type	Organization Operator
Channel	WEB	Amount(KSH)	130.00
Remark	Customer paid to our paybill account in error. The intended pay bill number the customer wanted to pay to is: 200700		
Note			
Failure Description			

Account Entries

Identity Type	Identity	Account	Reason Type	Details	Transaction Amount
Organization	200777 - PAYBILLMERU	Utility Account\500000000110331831	Pay Utility Reversal	Pay Utility Reversal by PAYBILLMERU\paybill...	KSH -130.00
Organization	200777 - PAYBILLMERU	Charges Paid Account\5000000001103318...	Pay Utility Reversal	Reversal for Pay Bill Charge	KSH 55.00

Audit Log

Linked Transaction Details

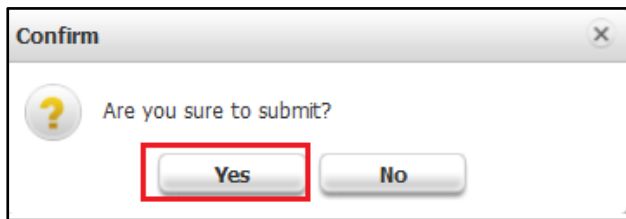
Task Processing

Action ☒ Approve ☐ Reject ☐ Investigate Add Comments

Comments Approved as per the request

Submit Cancel

The **Confirm** pop up window appears as shown below, select **Yes**



## 10 OPERATOR MANAGEMENT

### ***Why perform this action?***

To manage web operators that log into the system within the organization.

This includes the tasks to reset passwords, edit identity status, edit KYC info, changing role and security information.

### ***Start Here***

Log-in to M-PESA System as an Administrator or Business Manager.

- Select **My Functions**
- Click **Operator Management**
- Search using Operator ID/Username/first name/last name
- Click **Search**
- Click **Operation icon** to open Operator details



**M-PESA** My Tasks | Transaction | Account View | Search | My Functions | Browse Organization M-PESA Organization Portal Paybillmanager My Preference

Home Initiate Transaction Browse Organization Operator Managem... NAIROBI TELEVISION...

### Organization Operator

You can create an organization operator, query organization operators based on organization operator's information and select a record in the query result to access the organization operator management page.

**Search for Organization Operator**

Organization Short Code: 500500 Status: All

Operator ID: % User Name: %JOE

Role: All First Name: %

Middle Name: % Last Name: %

Date of Birth: Sorting Query Results By: Please Select

Search Reset

**Add**

ID	Organization Short Code	Organization Name	Operator ID	User Na...	First Na...	Middle N...	Last Na...	Date of...	Role	Status	Suspend...	Operati...
203000000000010784	500500	NAIROBI TELEVISION NETW...		JOE	JOHN	DOE		22/12/2014	Business...	Pending A...	No	

Total records: 1

10 records 1/1 Go

This role is available to users with either Administrator or Manager Role only.

## 10.1 Resetting passwords

While logged in as the Business Administrator or Business Manager

- ✓ Go to **Search**
- ✓ Select **Operator**
- ✓ Enter their Username
- ✓ Click on **Search**
- ✓ Click on the **Operation icon**

**M-PESA** My Tasks | Transaction | Account View | Search | My Functions | Browse Organization M-PESA Organization Portal paybillmanager My Preference

Home Operator Operator Organization

### Organization Operator

You can create an organization operator, query organization operators based on organization operator's information and select a record in the query result to access the organization operator management page.

**Search for Organization Operator**

Organization Short Code: 200777 Status: All

Operator ID: % User Name: %prudence

Role: All First Name: %

Middle Name: % Last Name: %

Date of Birth: Sorting Query Results By: Please Select

Search Reset

**Add**

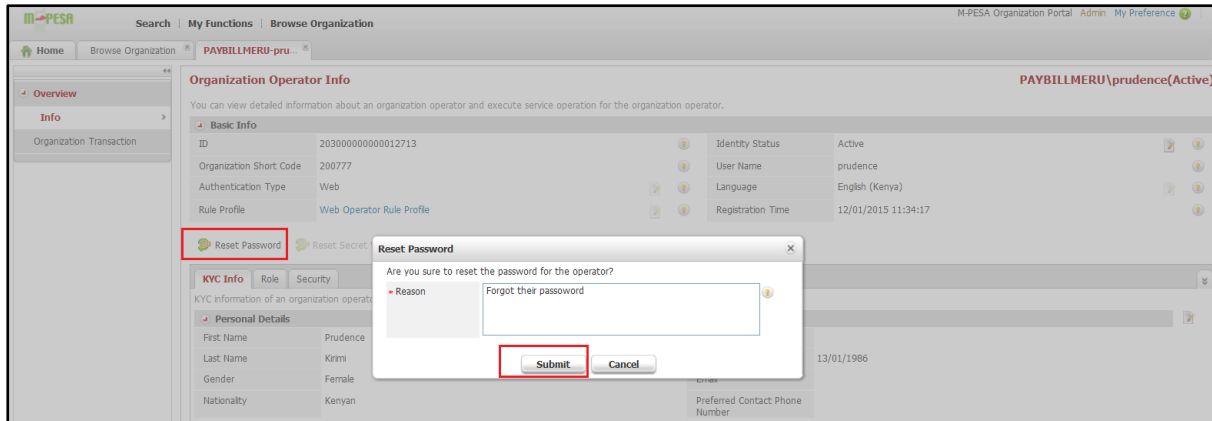
ID	Organization Short Code	Organization Name	Operator ID	User Name	First Name	Middle Name	Last Name	Date of Birth	Role	Status	Suspended	Operation
2030...	200777	PAYBILLMERU		prudence	Prudence		Kirimi	13/01/1986	Business Web Operator	Active	No	

Total records: 1

10 records 1/1 Go



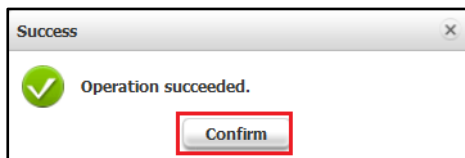
The **Organization Operator Info** page will open as shown below



The screenshot shows the M-PESA Organization Portal interface. The main content area displays the 'Organization Operator Info' for an operator named 'prudence'. The operator's details include ID, Organization Short Code, Authentication Type, Rule Profile, Identity Status, User Name, Language, and Registration Time. A 'Reset Password' dialog box is open, asking for a reason to reset the password. The 'Submit' button is highlighted with a red box.

- Select **Reset Password**
- Enter the **Reason**
- Select **Submit**

Click **Confirm** to complete the task

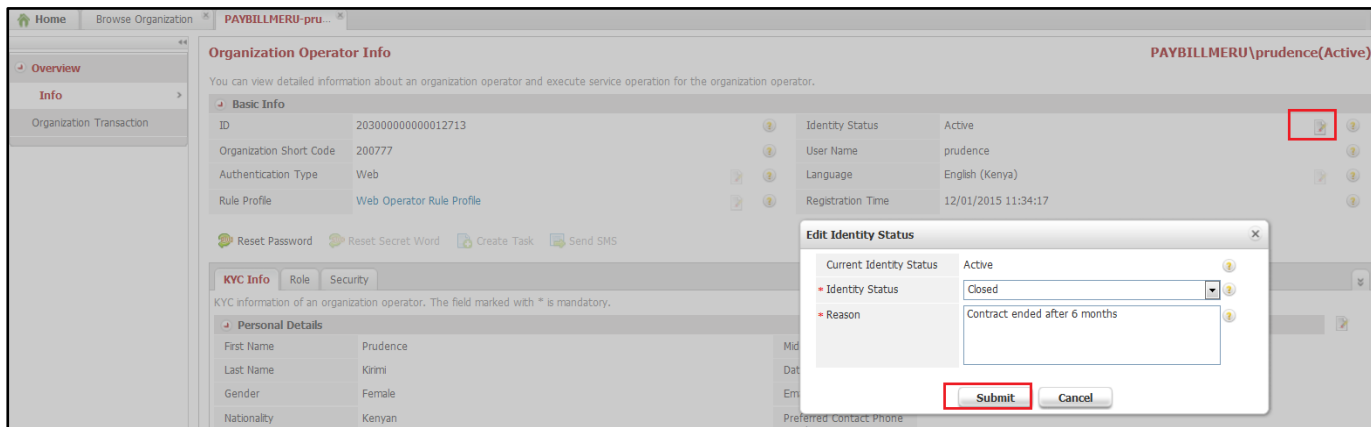


The screenshot shows a 'Success' dialog box with a green checkmark icon and the text 'Operation succeeded.'. The 'Confirm' button is highlighted with a red box.

## 10.2 Managing Identity Status

While logged in as the Business Administrator or Business Manager on the Organization Operator Info page:

- Go to **Identity Status**
- Select the **Edit** icon
- The **Edit Identity Status** pop up window will appear as below
- Enter **Reason**
- Select **Submit**



## 10.3 Managing KYC Info

While logged in as the Business Administrator or Business Manager on the Organization Operator Info page:

- Select **KYC Info** tab
- Enter the following:
  - ✓ Personal Details
  - ✓ ID Details
  - ✓ Contact Details
- Enter **Reason**
- Select **Submit**



**KYC Info** **Role** **Security**

KYC information of an organization operator. The field marked with \* is mandatory.

**Personal Details**

\* First Name: carol  
\* Last Name: cmurungi  
Gender: ☐ Male ☒ Female  
Nationality: Kenyan  
Middle Name:   
\* Date of Birth: 03/09/1985  
Email: cmurungi@safaricom.co.ke  
Preferred Contact Phone Number: 0722465588

**ID Details**

\* ID Type: National ID  
\* ID Number: 13353918  
ID Expiry Date:   
Operation: +

**Contact Details**

Preferred Notification Channel: Email  
Notification Receiving MSISDN: 254722465588  
Notification Receiving E-mail: cmurungi@safaricom.co.ke  
Reason: As requested

**Submit** **Cancel**

## 10.4 Managing the Role

While logged in as the Business Administrator, select the **Role** tab and then select the **Edit** icon

**M-PESA** Search | My Functions | Browse Organization | M-PESA Organization Portal Admin My Preference

Home | Browse Organization | PAYBILLMERU-pru

**Organization Operator Info** **PAYBILLMERU\prudence(Active)**

You can view detailed information about an organization operator and execute service operation for the organization operator.

**Basic Info**

ID: 203000000000012713  
Organization Short Code: 200777  
Authentication Type: Web  
Rule Profile: Web Operator Rule Profile  
Identity Status: Active  
User Name: prudence  
Language: English (Kenya)  
Registration Time: 12/01/2015 11:34:17

**KYC Info** **Role** **Security**

Role information of an operator. Different roles have different operation permissions.

Role	Effective Date	Expiration Date	Description	Operation
Business Web Operator	12/01/2015	31/12/2099	Business Web Operator	

The page will populate as shown below



Role	Effective Date	Expiration Date	Description	Operation
Business Web Operator	12/01/2015	31/12/2099	Business Web Operator	X

- Click on the **red X**

The **Confirm** pop up window will appear as below, select **Yes**

Click on **Add**

The **Select Role** pop up window will appear as shown below. Select the desired role and click **OK**

Role	Description
<input type="checkbox"/> Business Web Operator	Business Web Operator
<input type="checkbox"/> Manage Org Initiator Pass...	Manage Org Initiator Passwords
<input checked="" type="checkbox"/> Business Manager	Business Manager
<input type="checkbox"/> Business Auditor	Business Auditor

Enter a **Reason** for the addition of a new role and click on **Submit**



Home Browse Organization PAYBILLMERU-pru

**Organization Operator Info** PAYBILLMERU\prudence(Active)

You can view detailed information about an organization operator and execute service operation for the organization operator.

**Basic Info**

ID	203000000000012713	Identity Status	Active
Organization Short Code	200777	User Name	prudence
Authentication Type	Web	Language	English (Kenya)
Rule Profile	Web Operator Rule Profile	Registration Time	12/01/2015 11:34:17

Reset Password Reset Secret Word Create Task Send SMS

KYC Info **Role** Security

Role information of an operator. Different roles have different operation permissions.

**Add**

Role	Effective Date	Expiration Date	Description	Operation
Business Manager	13/01/2015	31/12/2099	Business Manager	X

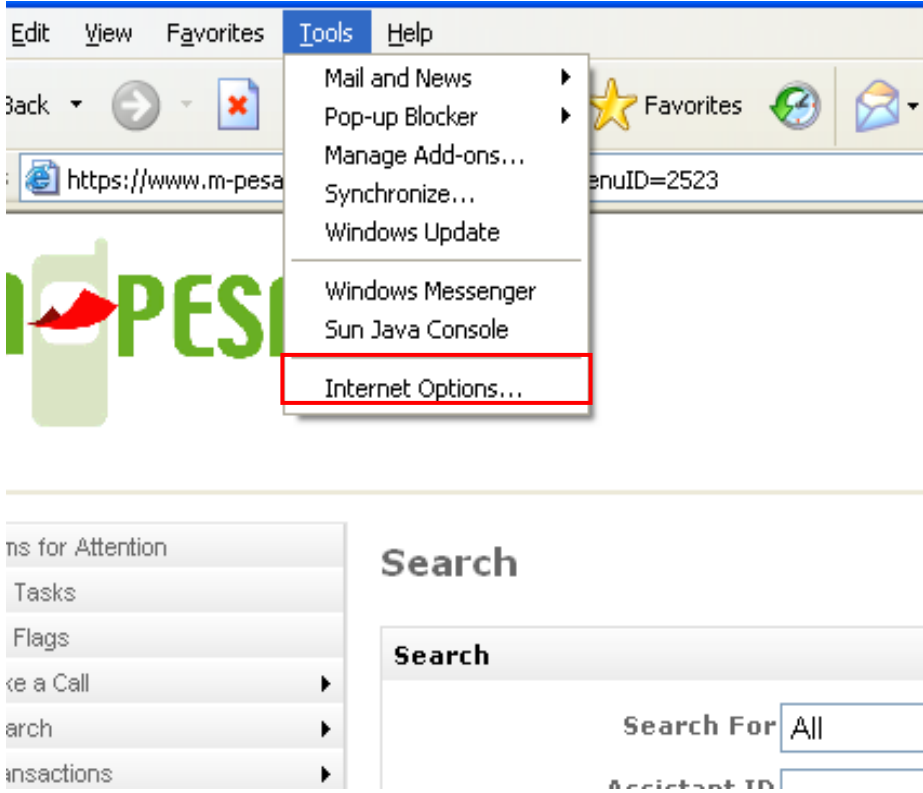
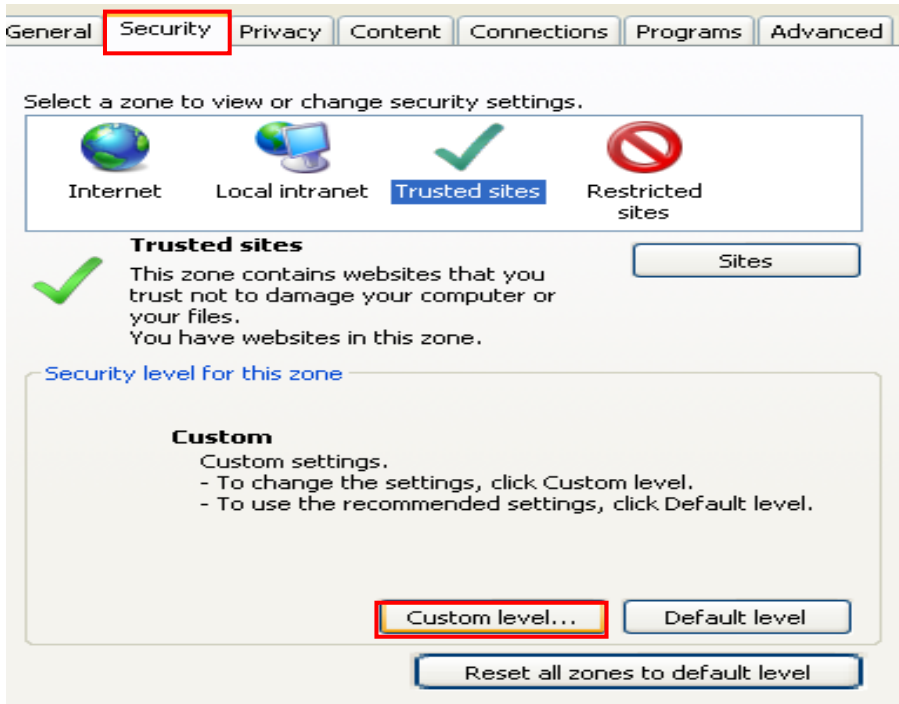
Reason Prudence has been promoted from web operator to manager.

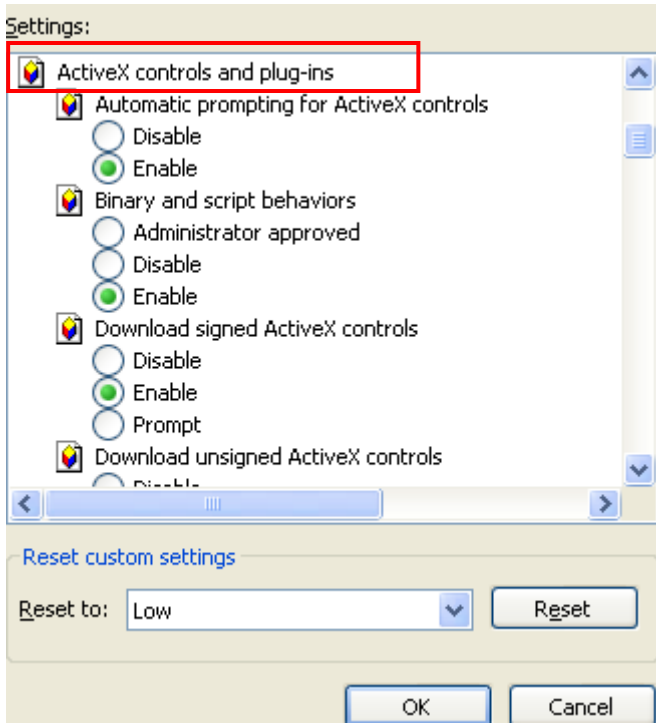
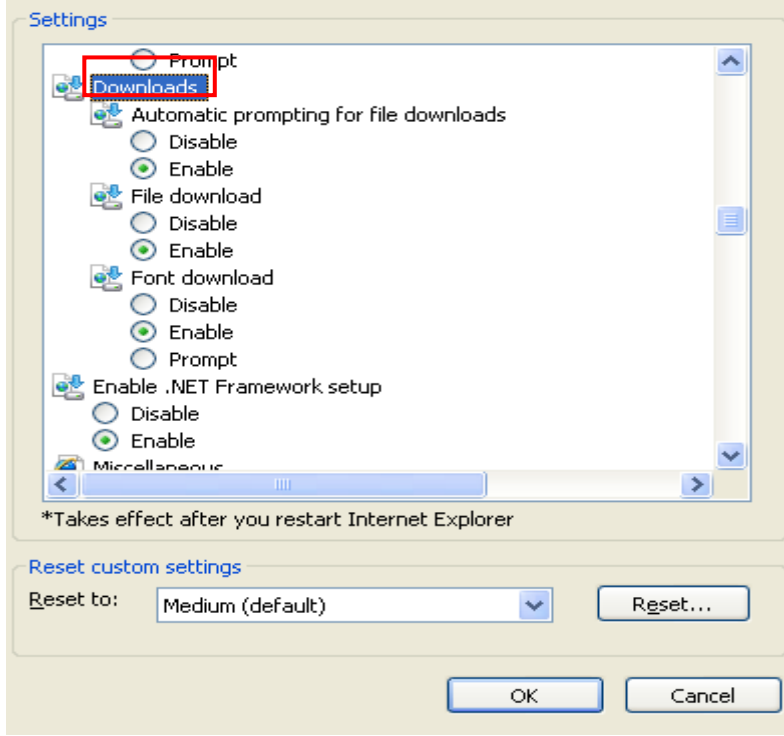
Submit Cancel

## 11 General Queries

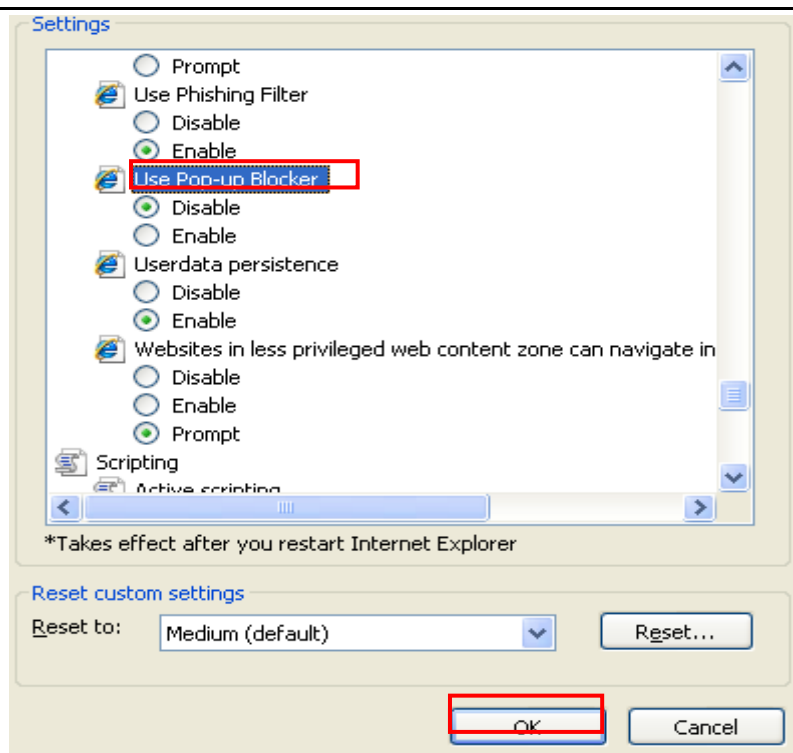
*Configuring your browser to download M-PESA Statements on Excel*

Please follow these steps to make sure ActiveX and Plug-ins and Pop-Ups are not disabled in your computer.

<ul style="list-style-type: none"> <li>On the Internet Explorer Browser, go to <b>Tools</b> &gt; <b>Internet Options</b> [a pop up appears]</li> </ul>	
<ul style="list-style-type: none"> <li>Click on the <b>Security</b> tab.....</li> <li>Click on the <b>Custom Level</b>.....tab - &gt; [a security settings pop up appears]</li> </ul>	

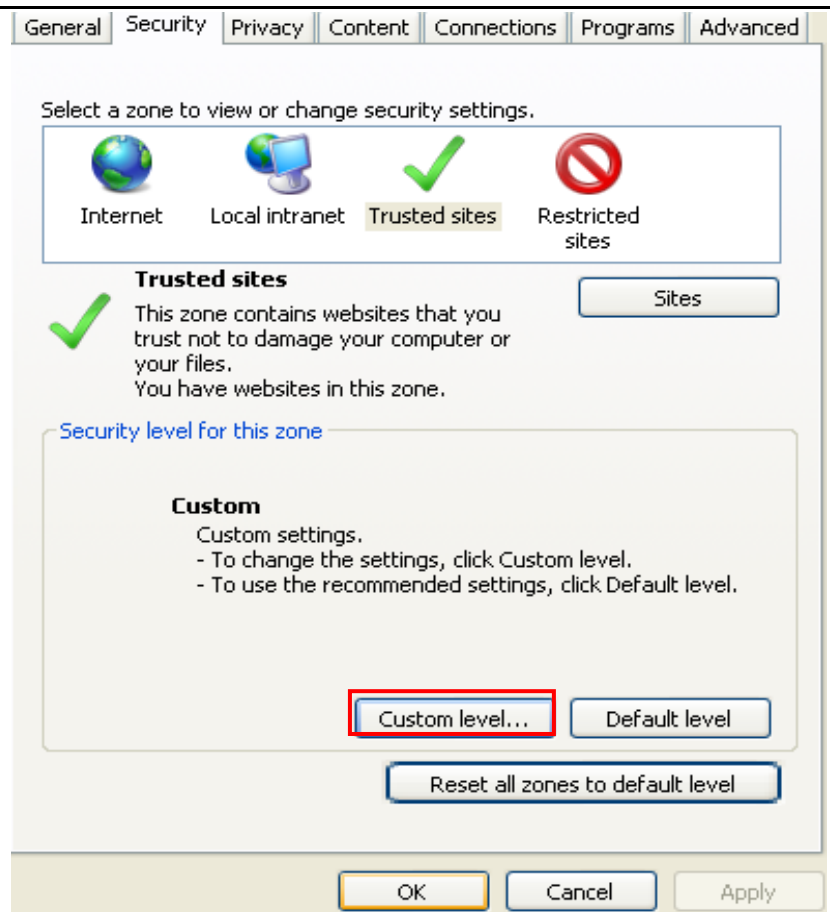
<ul style="list-style-type: none"> <li>• Scroll down to <b>ActiveX controls and Plug-ins</b>. Make sure all options under this are set to Enable</li> </ul>	
<ul style="list-style-type: none"> <li>• Scroll down to <b>Downloads</b> and make sure all options are set to <b>Enable</b></li> </ul>	

- Scroll further down till you find **'Use Pop-up Blocker'** make sure it is set to **Disable**.
- Click **OK**





- Click **OK** again as indicated.



## ESCALATIONS

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