



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.

Step 1:



-
- 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 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

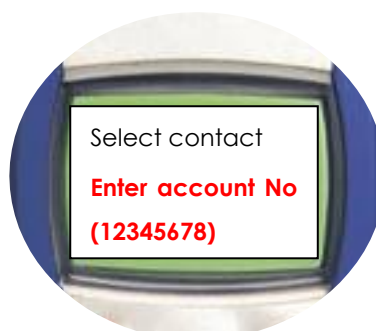
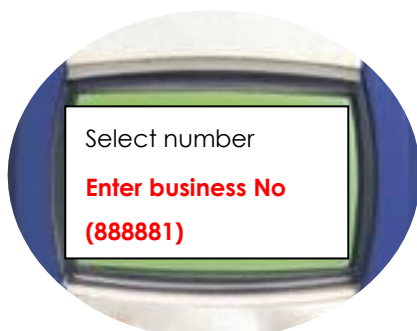
Organizations should have a maker and checker as separate individuals, one individual having two accounts is not allowed.

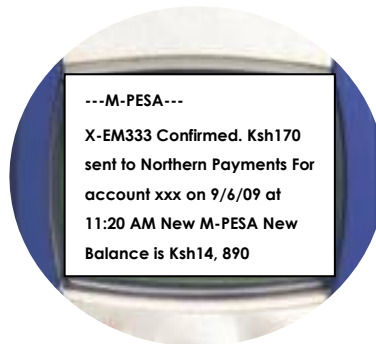
4 CUSTOMER PAYMENTS

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?

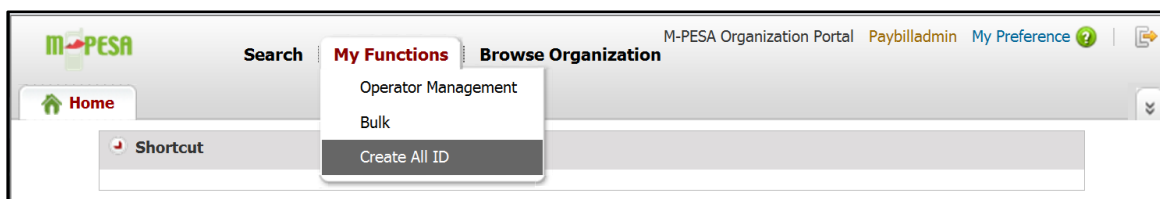
The M-PESA Web system is designed to have a 'maker' (Initiating Operator) and a 'checker' (Finalizing Operator) for completion of any transaction done via web.

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

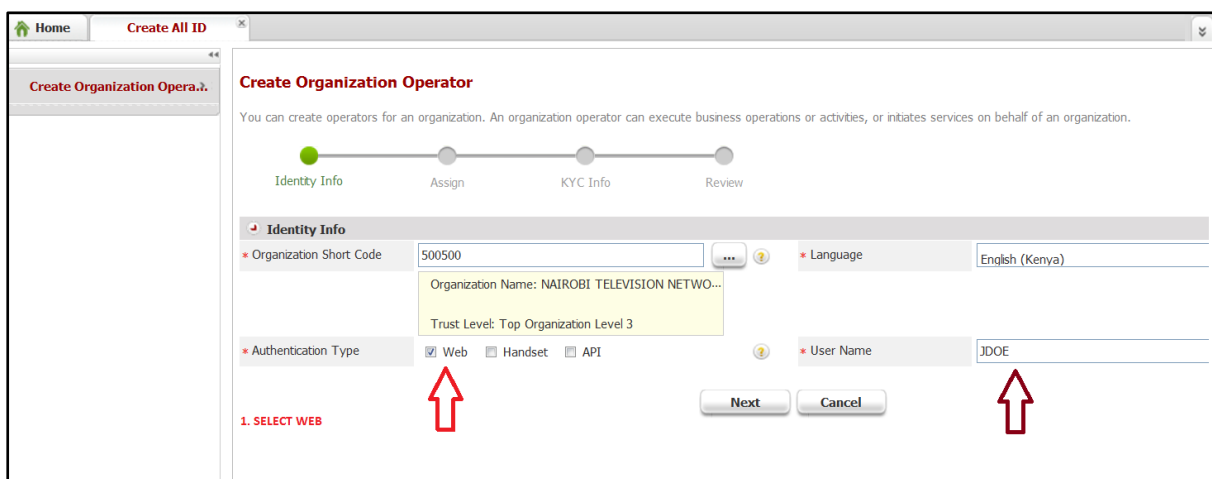
What to expect?

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**



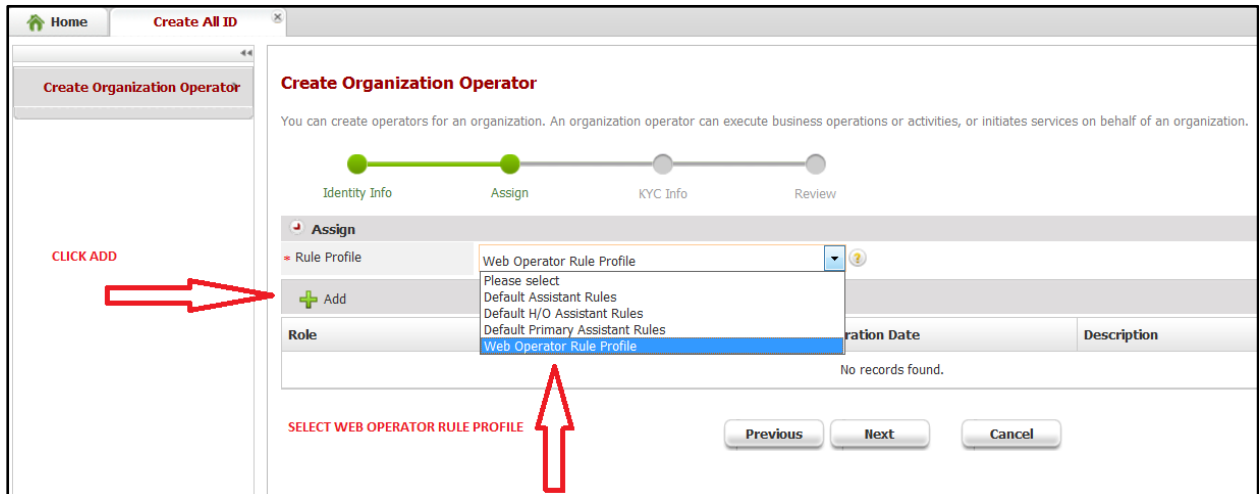
The **Create Organization Operator** page will open at the **Identity Info** stage as shown below.

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 red arrow points to the 'Web' checkbox under 'Authentication Type'. Another red arrow points to the 'User Name' field. The 'Next' and 'Cancel' buttons are at the bottom right. The left sidebar shows 'Home' and 'Create All ID'.

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.



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.

Identity Info Assign KYC Info Review

Assign

Rule Profile: Web Operator Rule Profile

+ Add

Role: Web Operator Rule Profile

Expiration Date: No records found.

Description: No records found.

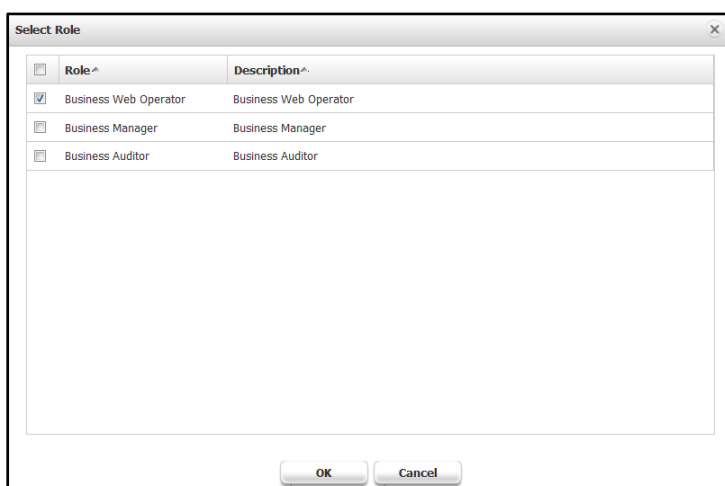
SELECT WEB OPERATOR RULE PROFILE

Previous Next Cancel

- 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**



Select Role

Role	Description
<input checked="" type="checkbox"/> Business Web Operator	Business Web Operator
<input type="checkbox"/> Business Manager	Business Manager
<input type="checkbox"/> Business Auditor	Business Auditor

OK Cancel



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.

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 Email:
Nationality: Kenyan Preferred Contact Phone Number: 254722123456

ID Details

ID Type	ID Number	ID Expiry Date	Operation
National ID	12345678		+

Contact Details

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

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

Rule Profile: Web Operator Rule Profile

Role	Effective Date	Expiration Date	Description
Business Web Operator	29/12/2014	31/12/2099	Business Web Operator

KYC Info

Personal Details

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

ID Details

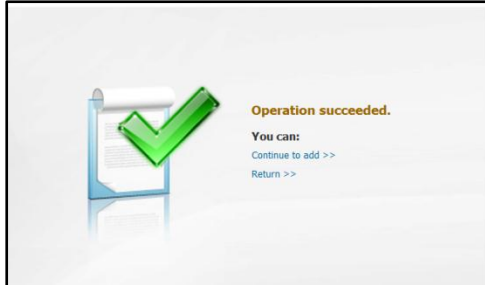
ID Type	ID Number	ID Expiry Date
National ID	12345678	

Contact Details

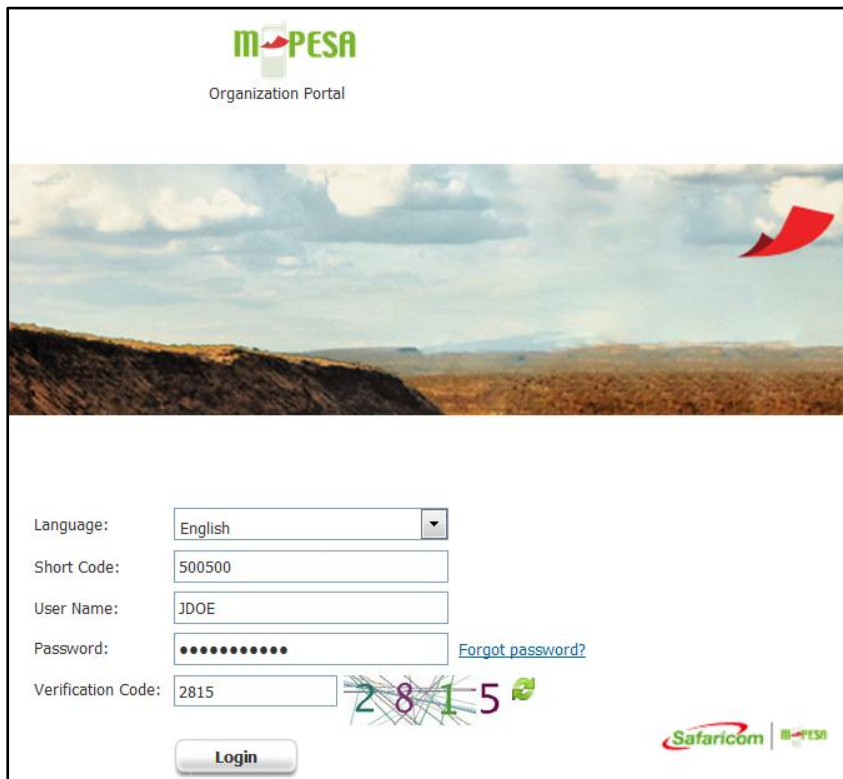
Preferred Notification Channel: Email Notification Receiving MSISDN: 254722123456
Notification Receiving E-mail: JDOE@SAFARICOM.CO.KE

Previous **Submit** Cancel

- You can continue to create other users as per below

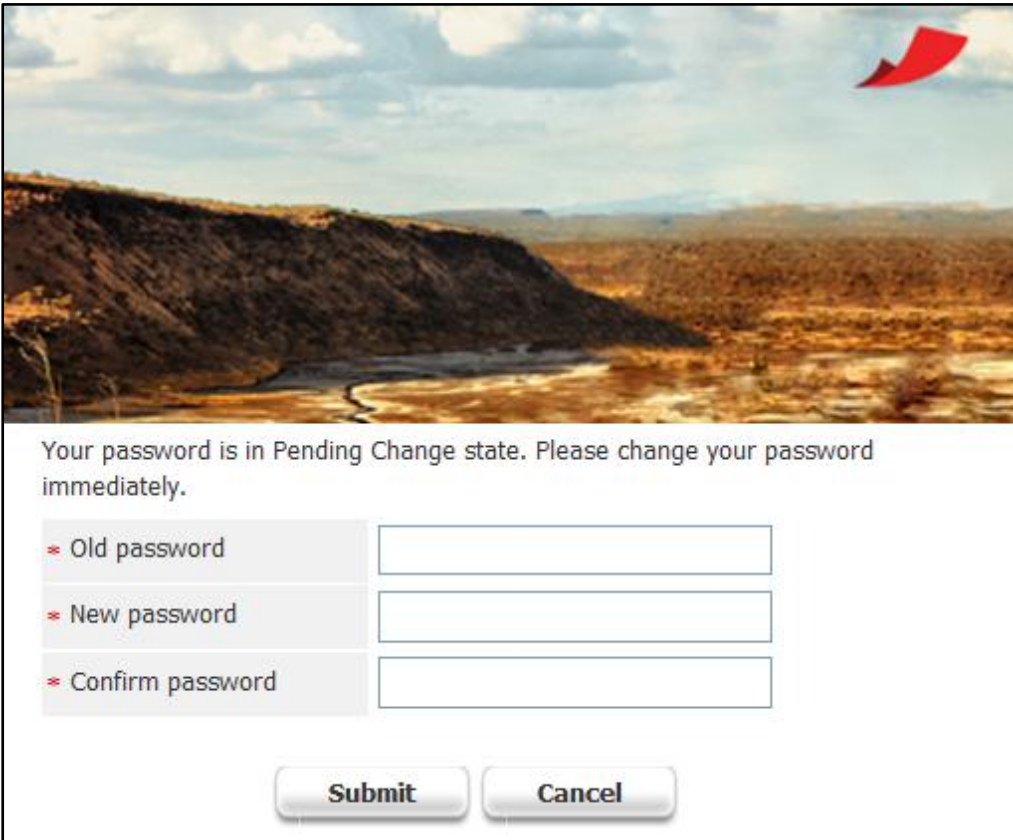


- Log-in to M-PESA System using the newly created credentials as below



- 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 FUNDS TRANSFER

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.

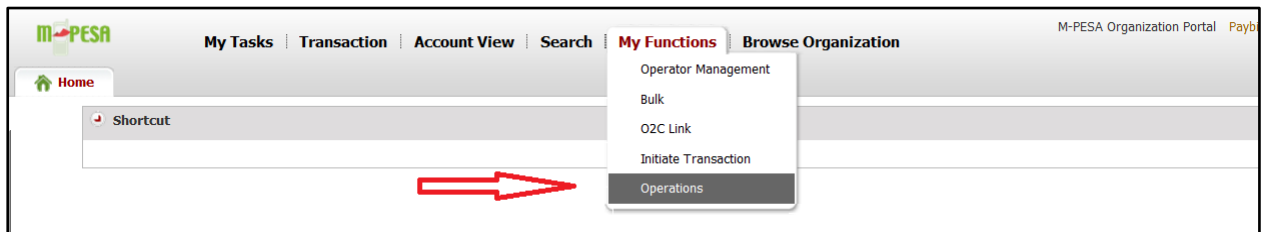
1 Start Here

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

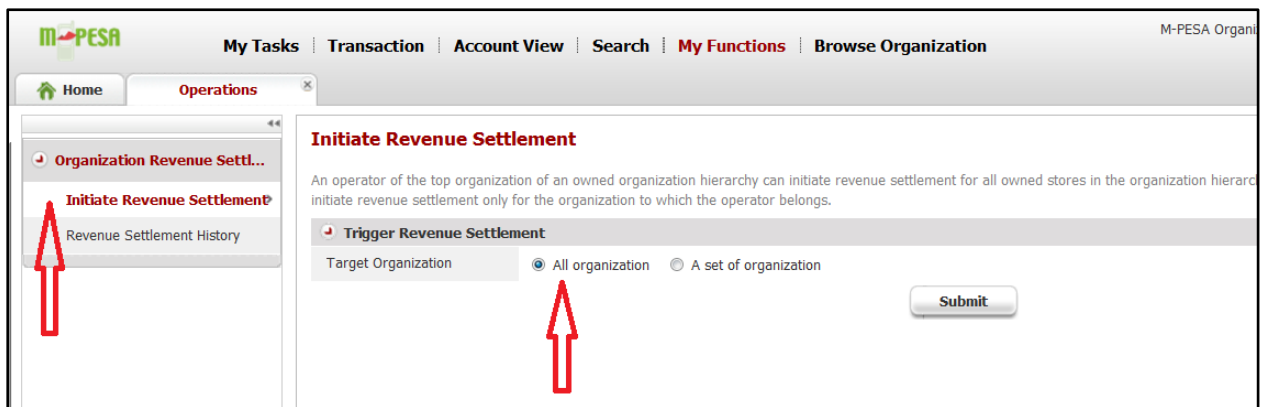
Procedure:

- 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 Ti...	Due Time	Initiator	Status	Category	Operation
1LUG0CFNQ	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

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

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

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

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.

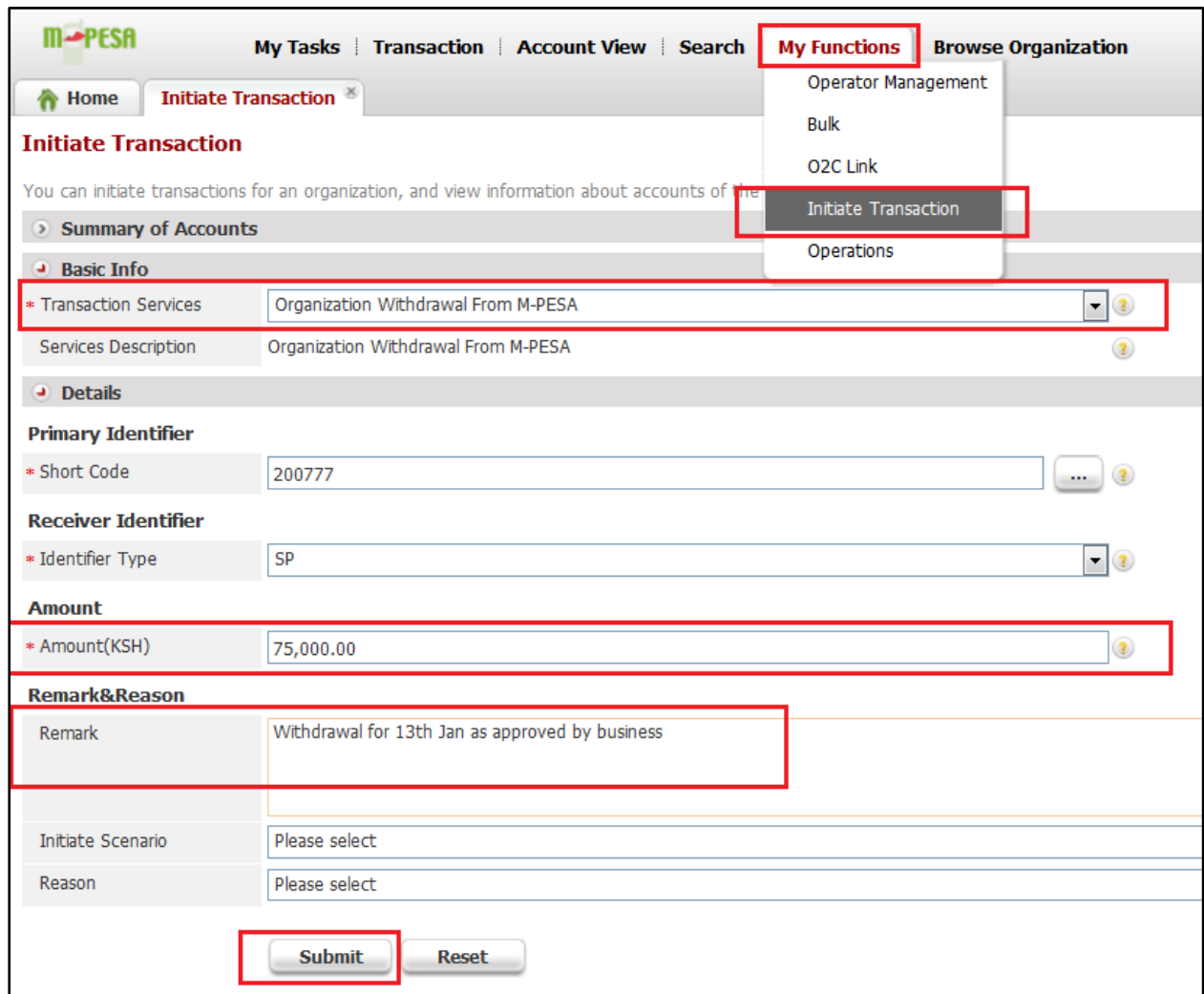
What to expect?

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

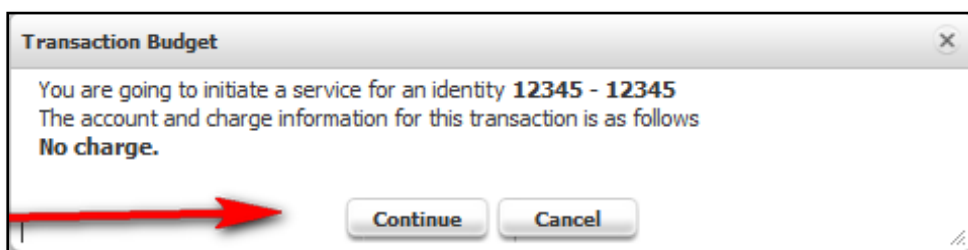
Remark Withdrawal for 13th Jan as approved by business

Initiate Scenario Please select

Reason Please select

Submit Reset

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



Transaction Budget

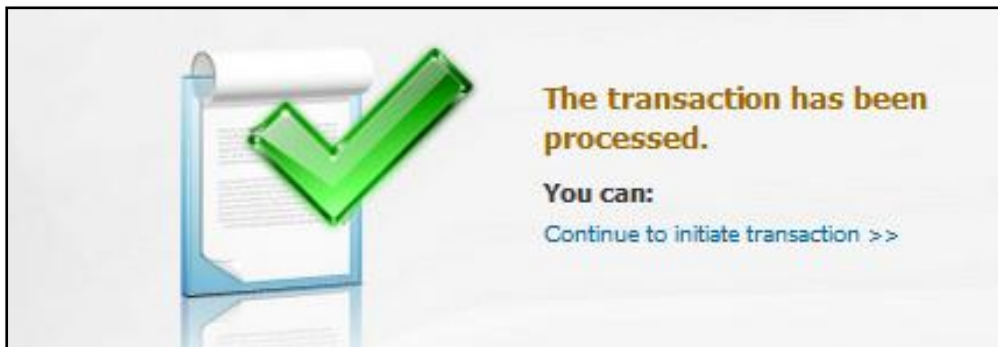
You are going to initiate a service for an identity **12345 - 12345**
The account and charge information for this transaction is as follows
No charge.

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

Account No. Initiation Time 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

Search 5

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

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 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 3

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 4

Completed Transaction All Transaction

Completion Time: 07/01/2015 00:00:00 ~ 13/01/2015 23:59:59 5

6 **Search** **Reset**

Export 7

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...
2AC704H4B 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.



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(S00...	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 Organization Portal | paybillmanager | My Preference

Home | Group Task | Transaction | Account View | Search | My Functions | Browse Organization

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

10 records

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

M-PESA Organization Portal | paybillmanager | My Preference

Home | Transaction Confirmation | Transaction | Account View | Search | My Functions | Browse Organization

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\5000000000110331831	Pay Utility Reversal	Pay Utility Reversal by PAYBILLMERU\paybill...	KSH -130.00
Organization	200777 - PAYBILLMERU	Charges Paid Account\50000000001103318...	Pay Utility Reversal	Reversal for Pay Bill Charge	KSH 55.00

Audit Log

Linked Transaction Details

Task Processing

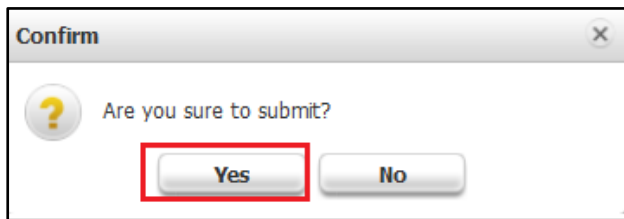
Action ☒ Approve ☐ Reject ☐ Investigate

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 Name	First Name	Middle Name	Last Name	Date of Birth	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

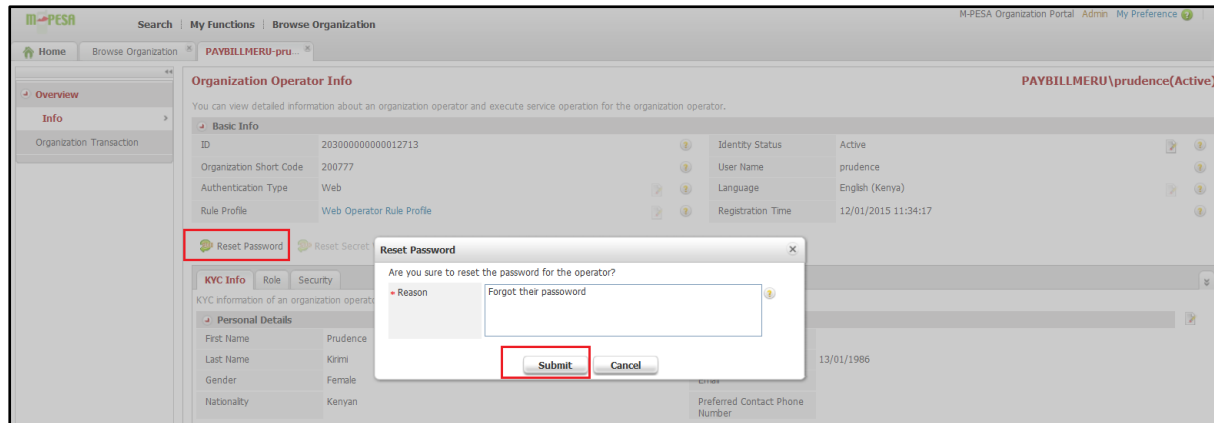
Add

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		Kirmi	13/01/1986	Business Web Operator	Active	No	

Total records: 1

10 records 1/1 Go

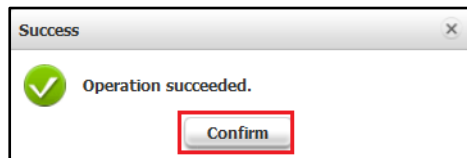
The **Organization Operator Info** page will open as shown below



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

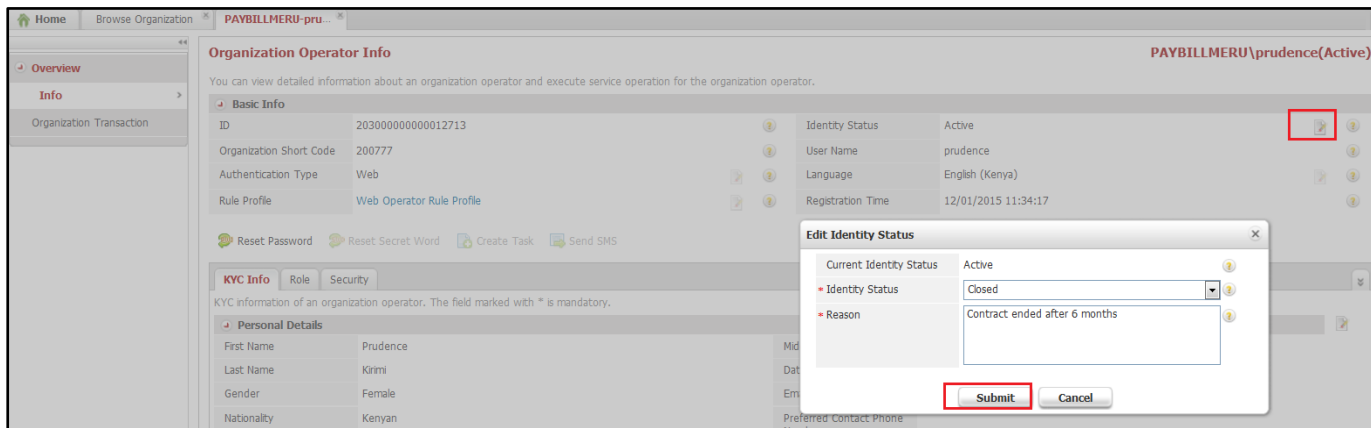


The screenshot shows a 'Success' dialog box with a green checkmark icon and the text 'Operation succeeded.'. The 'Confirm' button is highlighted with a red box.

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

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

Organization Operator Info

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

Role

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



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	20300000000012713	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

Role

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	X

Reason

Submit Cancel

- Click on the **red X**

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

Confirm

Are you sure to delete it?

Yes No

Click on **Add**

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

Select Role

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

OK Cancel

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

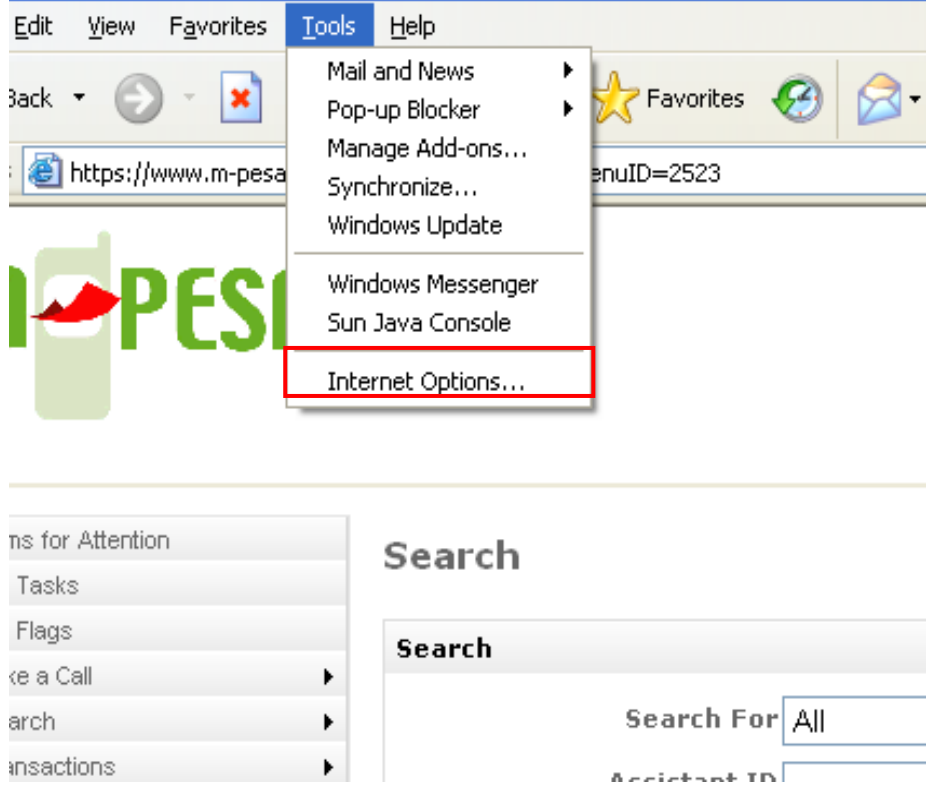
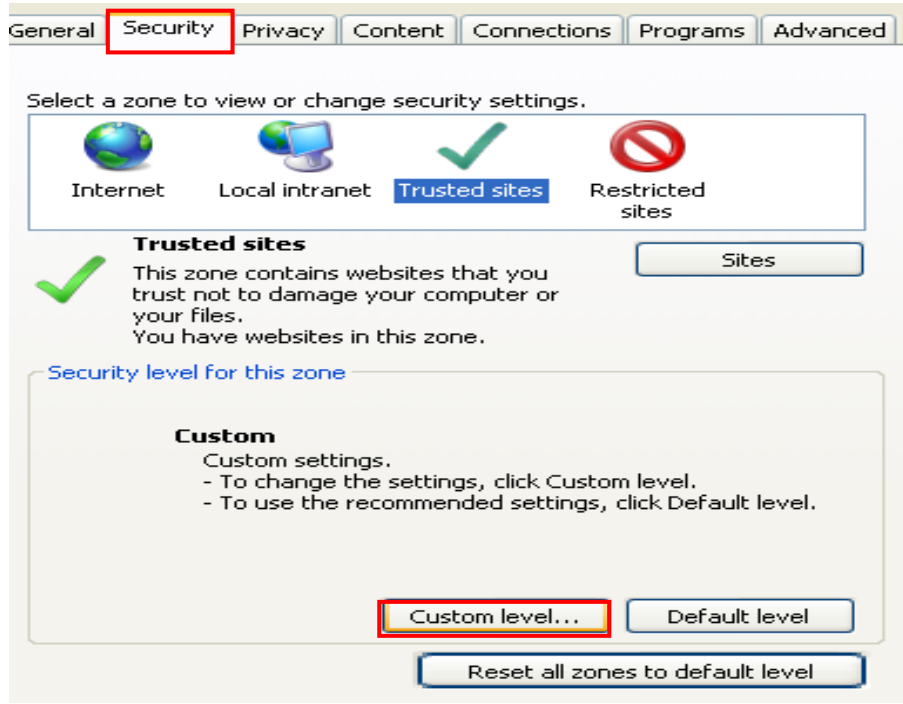
Reason Prudence has been promoted from web operator to manager.

Submit Cancel

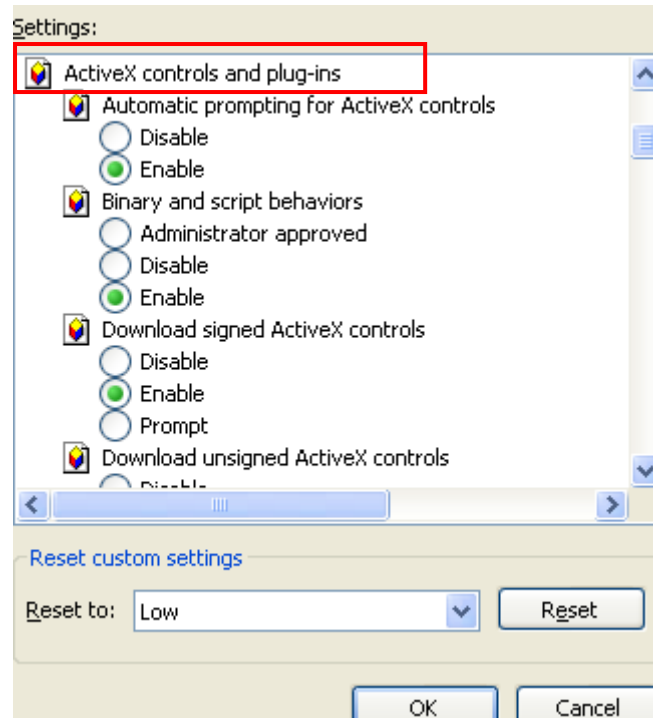
11 General Queries

Configuring your browser to download M-PESA Statements on Excel

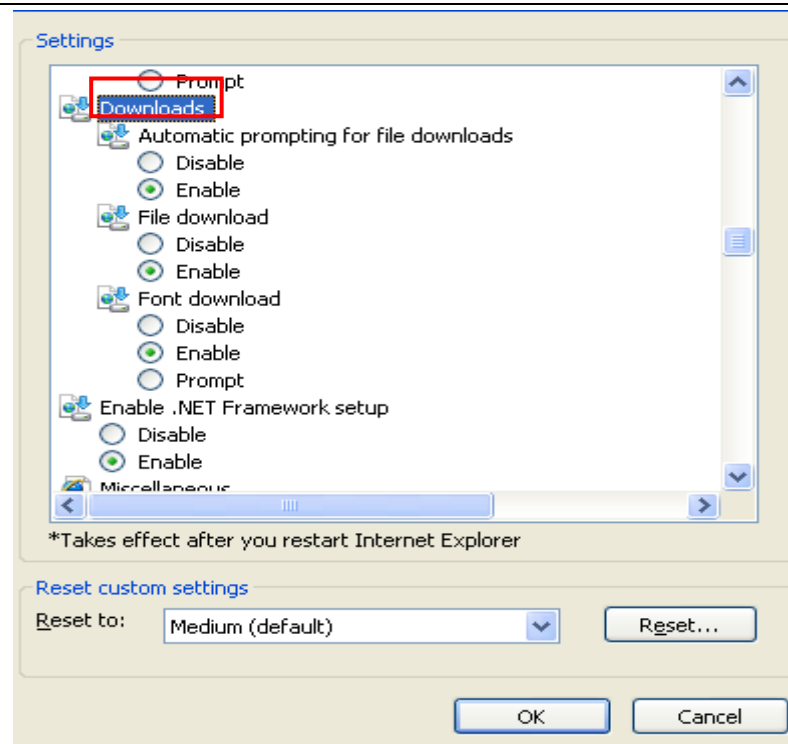
Please follow these steps to make sure ActiveX and Plug-ins and Pop-Ups are not disabled in your computer.

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

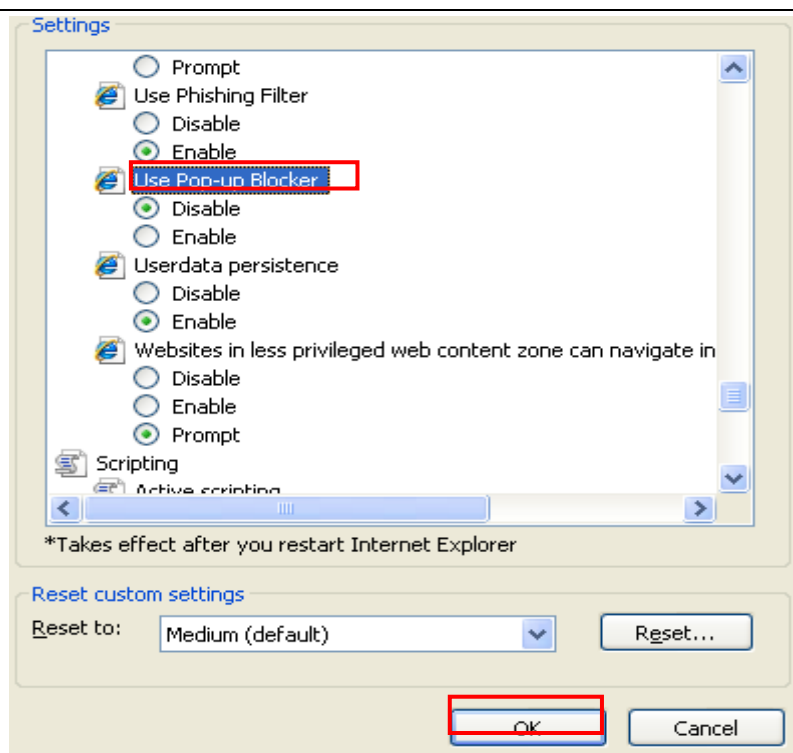
- Scroll down to **ActiveX controls and Plug-ins**. Make sure all options under this are set to Enable



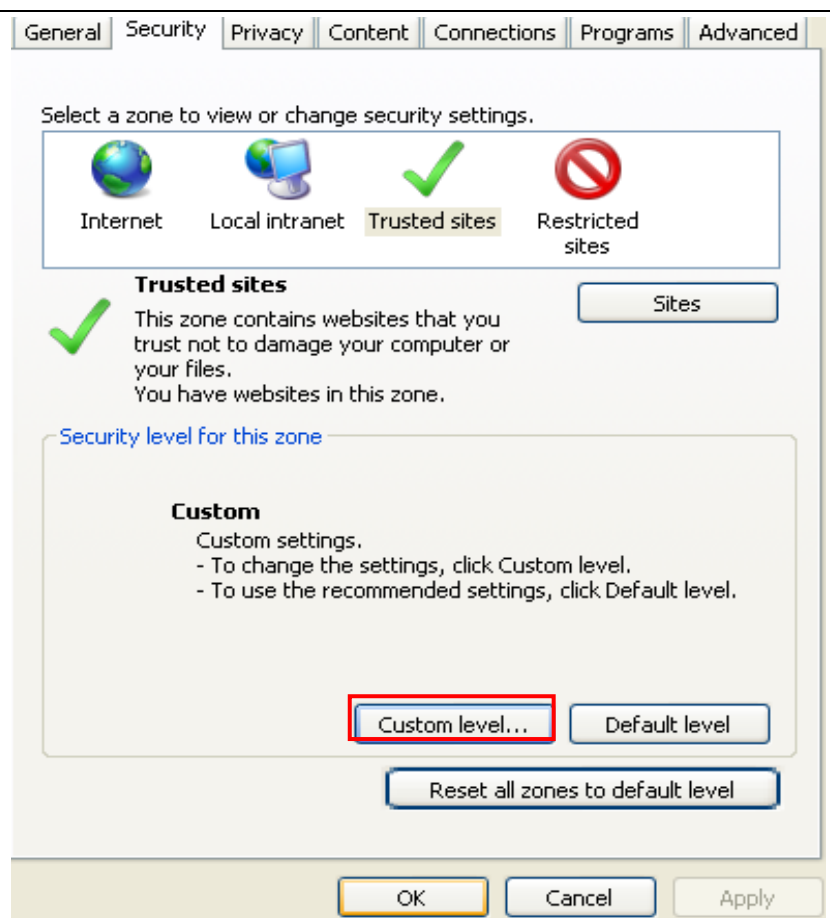
- Scroll down to **Downloads** and make sure all options are set to **Enable**



- 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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