MYTIME SERVICES

Mobile Wallet

Debit Cards

Market Place

Wireless Service

Tele Health

AGENT TRAINING MANUAL

V_07-2023

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Manuals Updates

There are no documents that are written in stone and as the company evolves, so will the manual. We will do our best to continue to update the manuals as often as needed, and if you feel you do not have the updated manual, please contact management for the latest copy.

Introduction:

We have finished the implementation of your new Distributor Merchant / Distributor production portal. Below is the URL, username, password, and helpful information you will need to access your portal. Please consult the Merchant / Distributor Manual provided with this letter for instructions regarding every page of the portal. If you would like additional training, we can schedule individual and group training calls and/or visits.

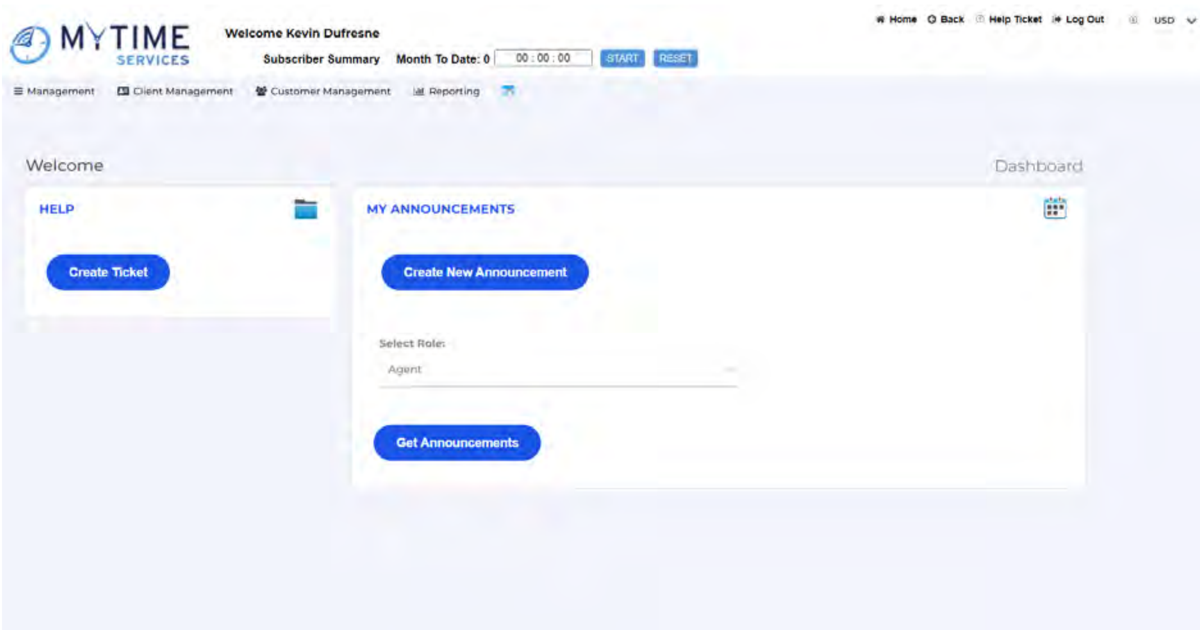
Please go through your portal to make sure that everything is set up and working as requested. Please see section 7 for testing scenarios that you should use prior to launch.

*NOTE: If you see any issues, please call your MyTime Services representative. There are literally thousands of scenarios to test and we will need your help to make sure that all systems check out and are configured to your specifications. A live production launch should **NOT** be completed until your internal testing team has done a complete run-through of the system. Count on this process taking a week to complete.*

Agent Portal:

MyTime Agent Portal> Welcome

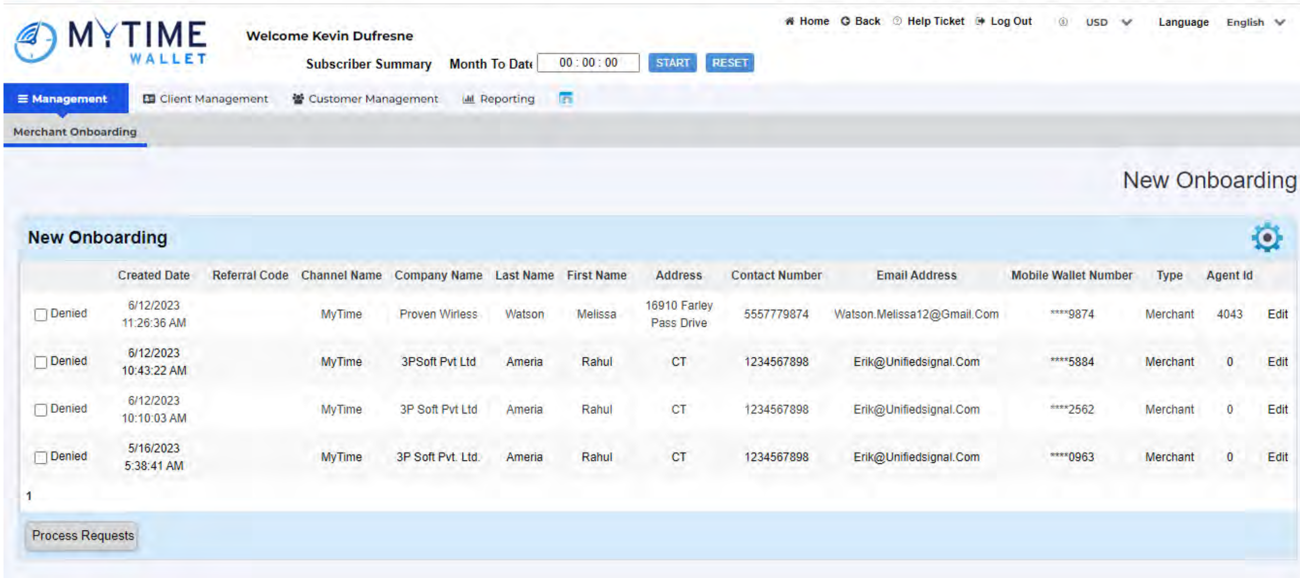
The Dashboard provides a Welcome screen with quick access to created trouble tickets, creating new announcements, and receiving new announcements from the MyTime Services team.



Management Tab:

MyTime Agent Portal> Management> Merchant Onboarding

The Agent will manage the Merchant Onboarding queue for managing new Merchant / Distributor onboarding. In this queue, if you check and submit the denied button you will have the ability to deny a distributor from signing up which will remove the user from the new onboarding queue and the distributor sign up and mobile wallet number used to sign up will be deactivated. To complete the Merchant / Distributors, signup you will click the edit button and continue to finalize the onboarding and setup for the Merchant / Distributor.



After clicking the edit button, you will be required to complete the following fields to process the signup. You may also fill in to edit any additional optional fields to help you better manage your Merchant / Distributors.

Distributor ID to Clone*

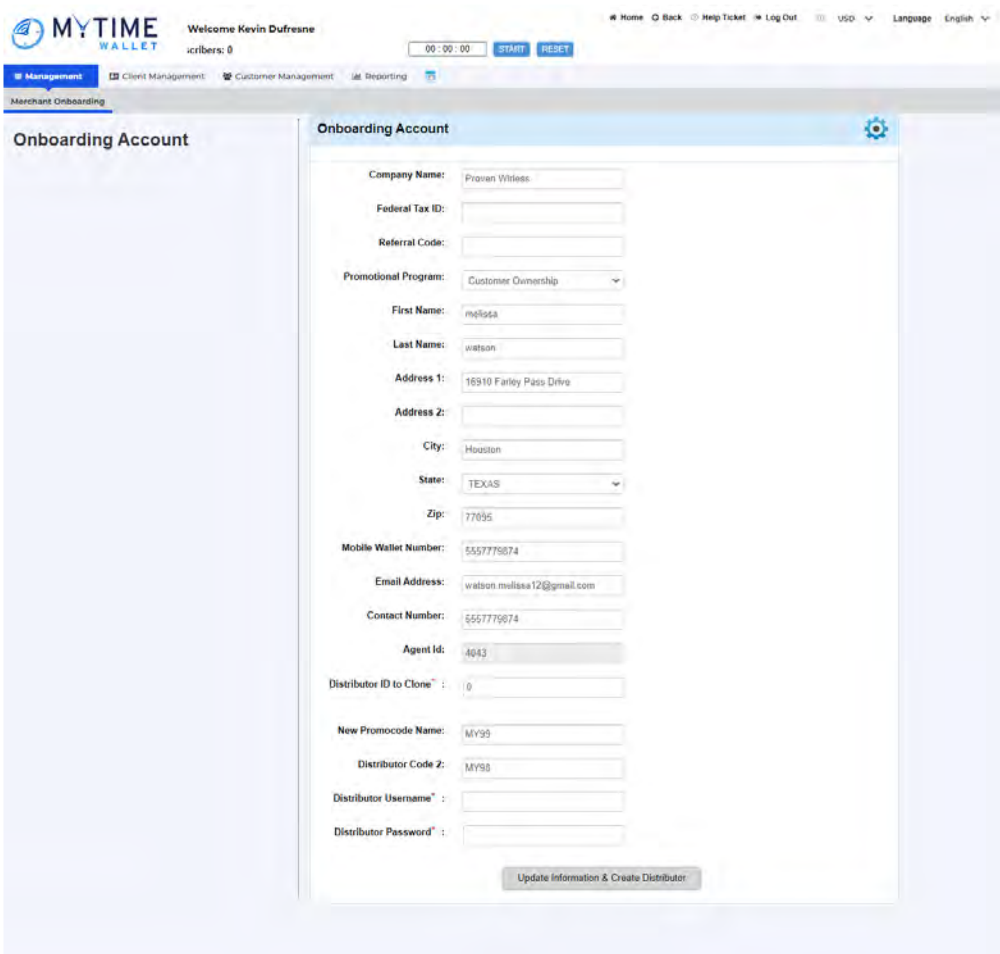
MyTime Agent Portal>Management>Merchant Onboarding>Edit

Please enter your personal distributor ID. If you have multiple Merchant / Distributor accounts to target different market segments (example, retail, social media, etc.) please enter your Distributor ID that best represents the marketing / commissioning structure that best represents the setup for the new Merchant / Distributor you are creating.

Distributor Username* Please Create a Username for the new Merchant / Distributor.

Distributor Password* Please Create a password for the new Merchant / Distributor.

Once you have entered and completed the Onboarding Account click the Update Information & Create Distributor button to complete the signup. You can then input the username, password, Distributor ID to Clone into the MyTime Merchant / Distributor Training Manual and Marketing Welcome Letter to provide to your new Merchant / Distributor.



Client Management /Genealogy

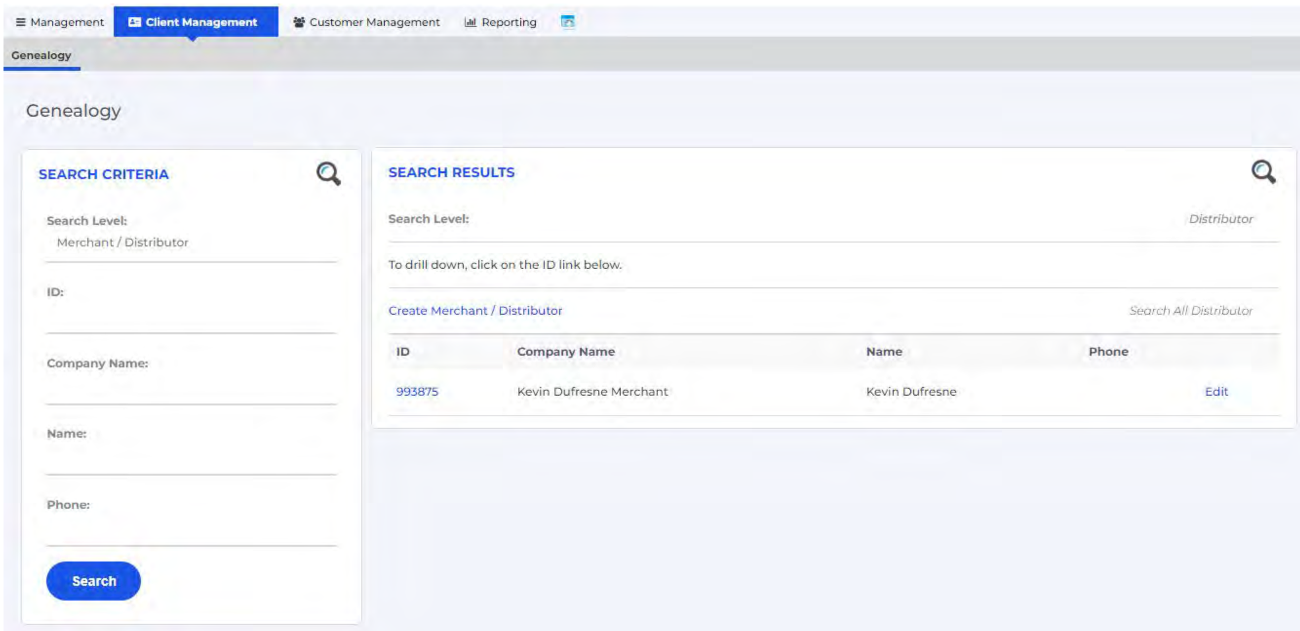
MyTime Agent Portal> Client Management> Genealogy

In this area, the Agent can search or create a new tier structure for Merchant / Distributor levels.

Search for Merchant / Distributors

When you search for a Merchant / Distributor, you will then use this menu as shown below. You can do a broad search of all Merchant / Distributors or narrow it down to a specific one using the variables below "Search Level".

When you do your search, to the right, will bring up the list of Merchant / Distributors.

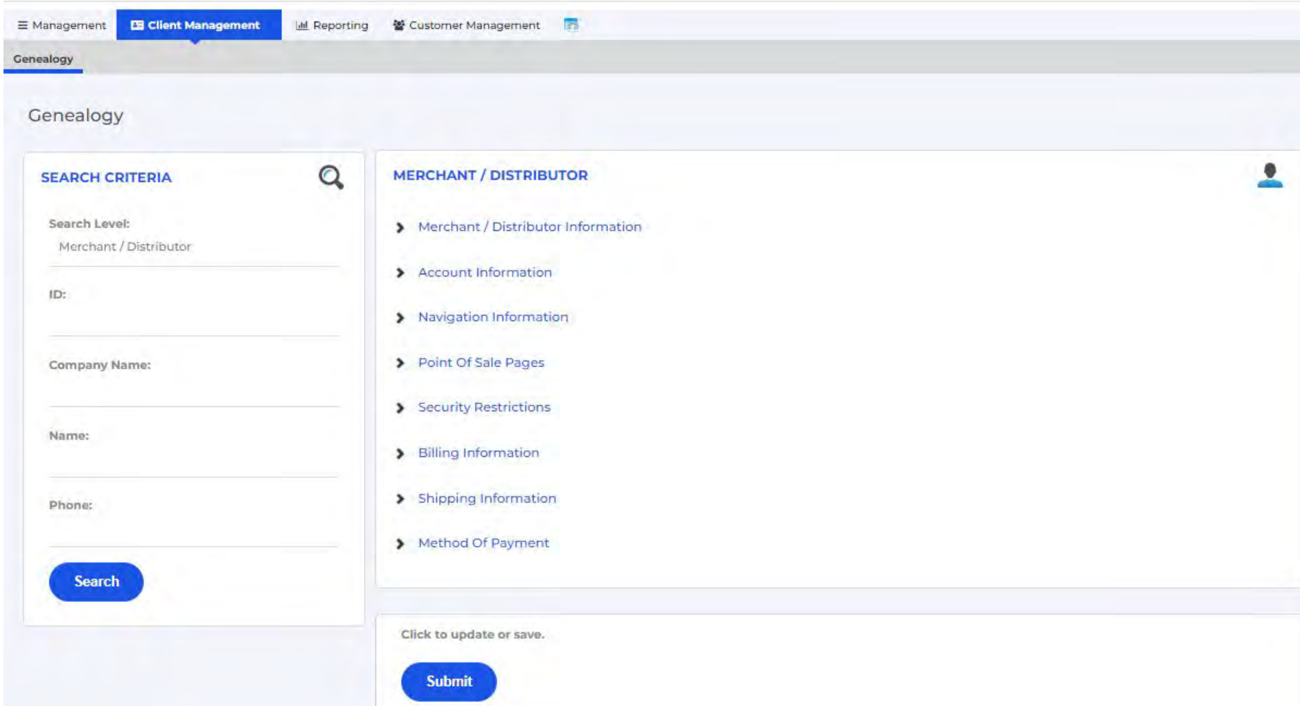


Create Merchant / Distributors

Merchant / Distributor Information

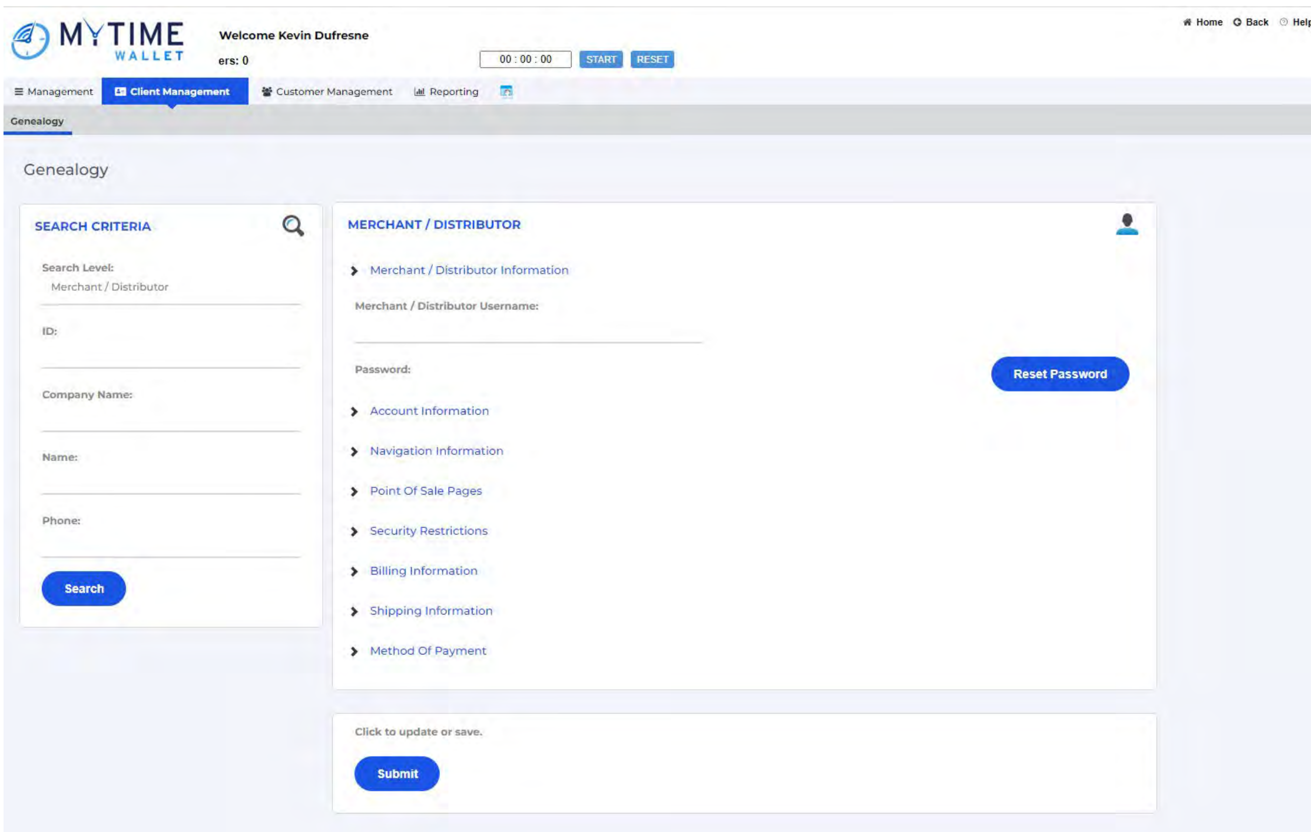
MyTime Agent Portal>Client Management>Create Merchant / Distributor

To create Merchant / Distributors under your Agent ID you will log in to your Agent portal and select the Client Management Tab / Genealogy / and click the link to create Merchant / Distributors. You will see a group of tabs we will outline below instructing you how to complete the Merchant / Distributors sign-up process.



MyTime Agent Portal>Client Management>Create Merchant / Distributor> Merchant / Distributor Information

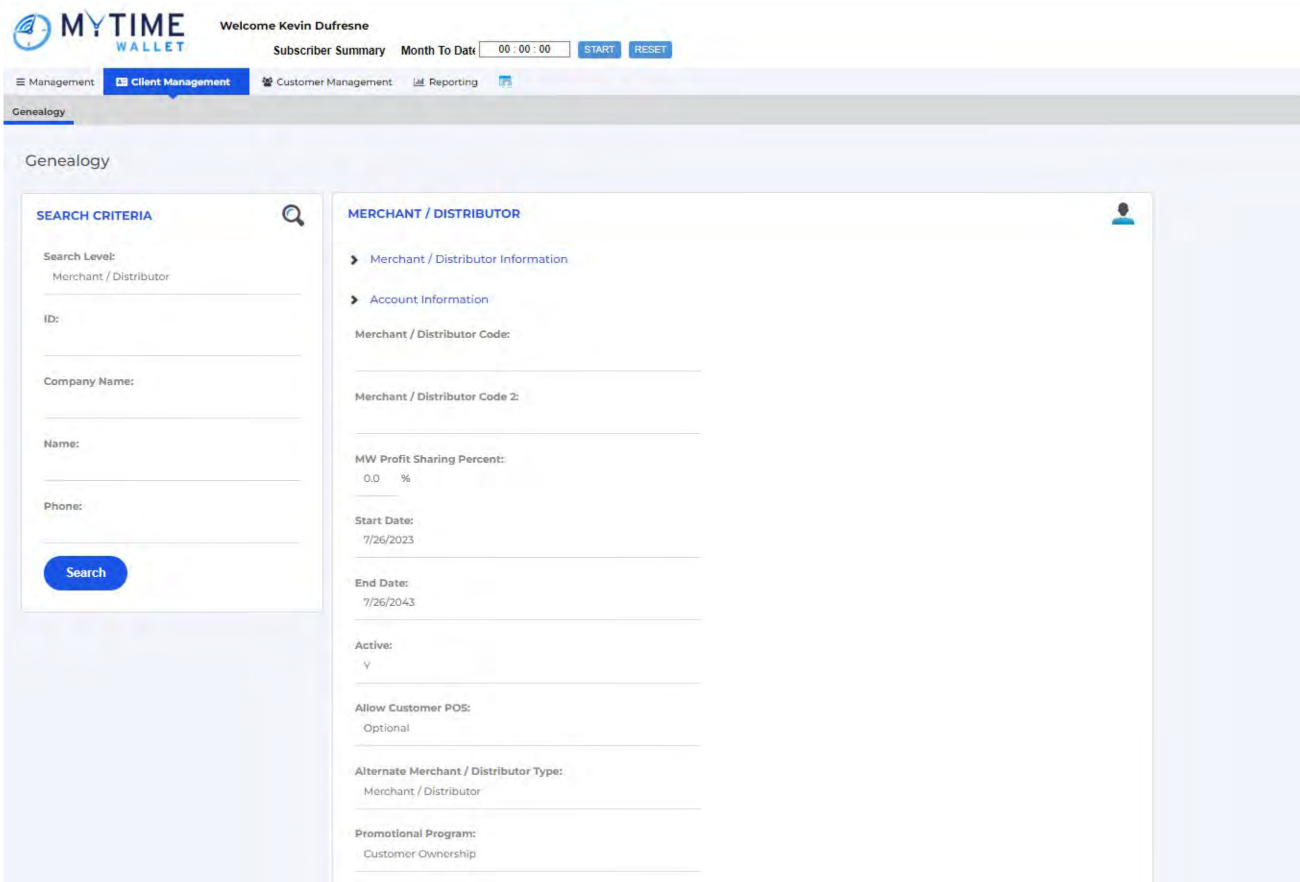
Under the Merchant / Distributor Information section, you will need to create a username for your new Merchant / Distributor. The password is randomly generated when you complete the sign-up form. When you log into your Merchant / Distributor account you will then be able to change the generated password. If at any time you forget the password by clicking the reset password button a new password will be generated.



Account Information

MyTime Agent Portal>Client Management>Create Merchant / Distributor>Account Information

Under the account information section, you are required to enter a 4-digit merchant distributor code. Merchant Distributor codes are 4 characters that can be all numbers, all letters, or a combination of numbers and letters. Enter Merchant Distributor code 1 and Merchant Distributor code 2. The system will use the Merchant Distributor code 2 if the merchant distributor code 1 is already in use by another merchant distributor. Then enter the MW Profit Sharing percentage you will be providing to your new merchant distributor.

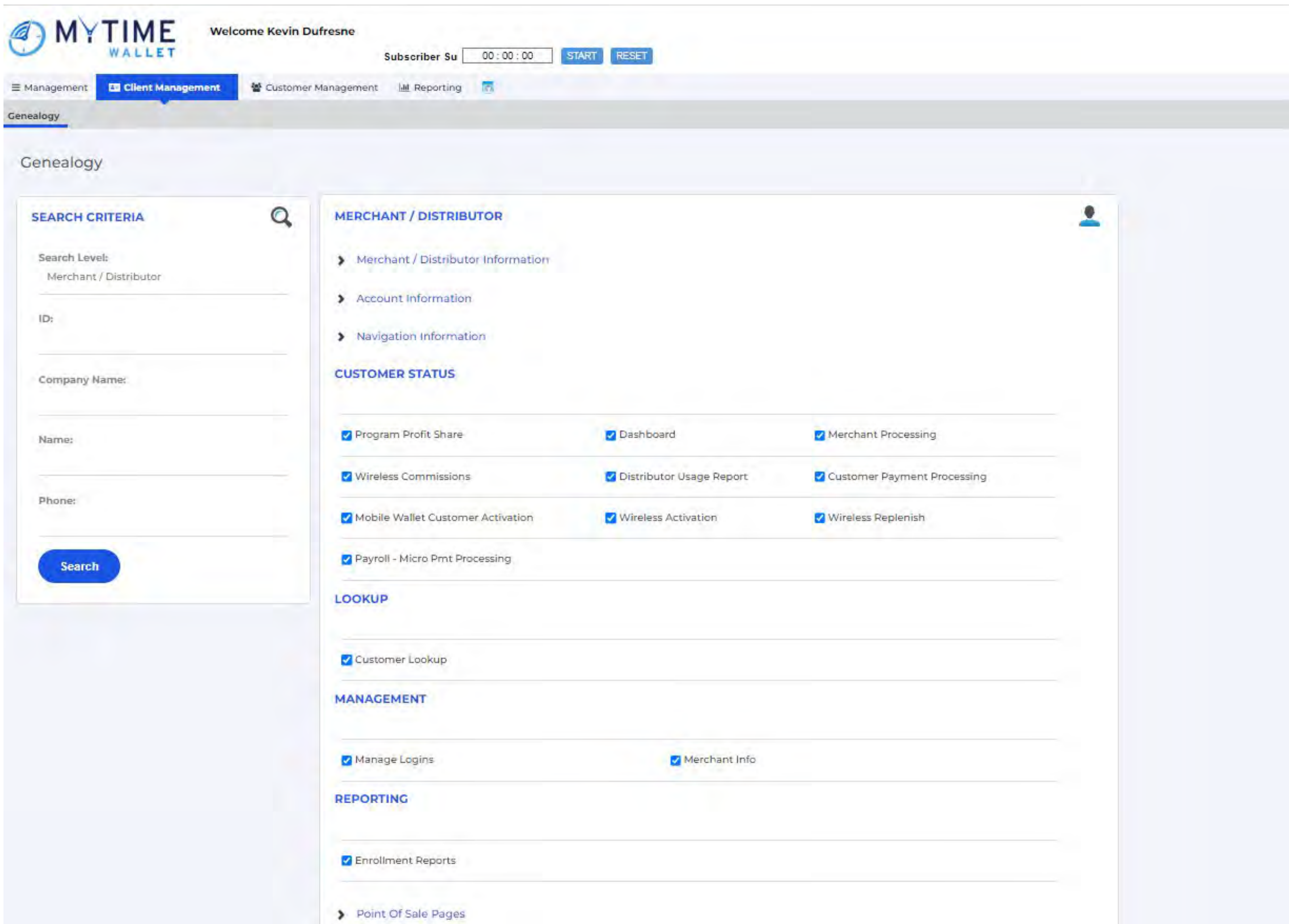


All other fields in the Account Information section are already prepopulated to the correct settings. DO NOT EDIT OR CHANGE THE FOLLOWING FIELDS: Start Date, End Date, Active, Allow Customer POS, Alternate Merchant Distributor Type, and promotional program. Below are the correct preset settings. If for some reason you accidentally changed these settings here is a screenshot of the correct settings:

Navigational Information

MyTime Agent Portal>Client Management>Create Merchant / Distributor>Navigation Information

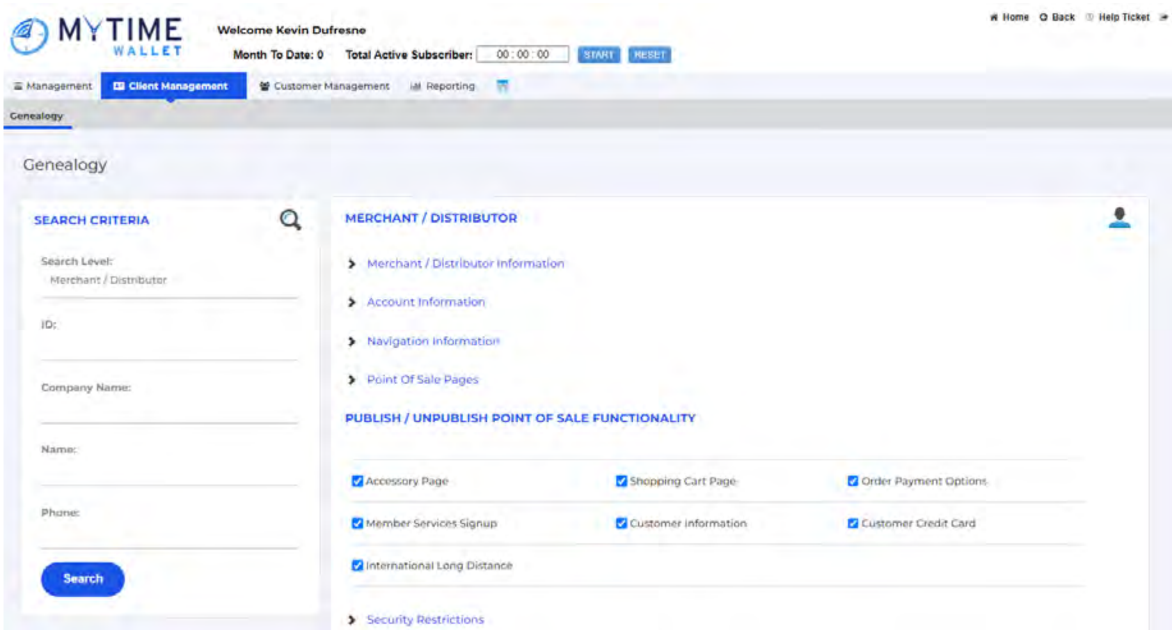
Under Navigational Information, you will use the checkboxes to determine what the Merchant / Distributor will and won't see in their portal. These can be adjusted at any time. For convenience purposes, we have checked all functionality that should be enabled for your new Merchant / Distributor. Unchecking any of these boxes will remove the functionality they need to run their program.



Point of Sale Pages

MyTime Agent Portal>Client Management>Create Merchant / Distributor>Point of Sale Pages

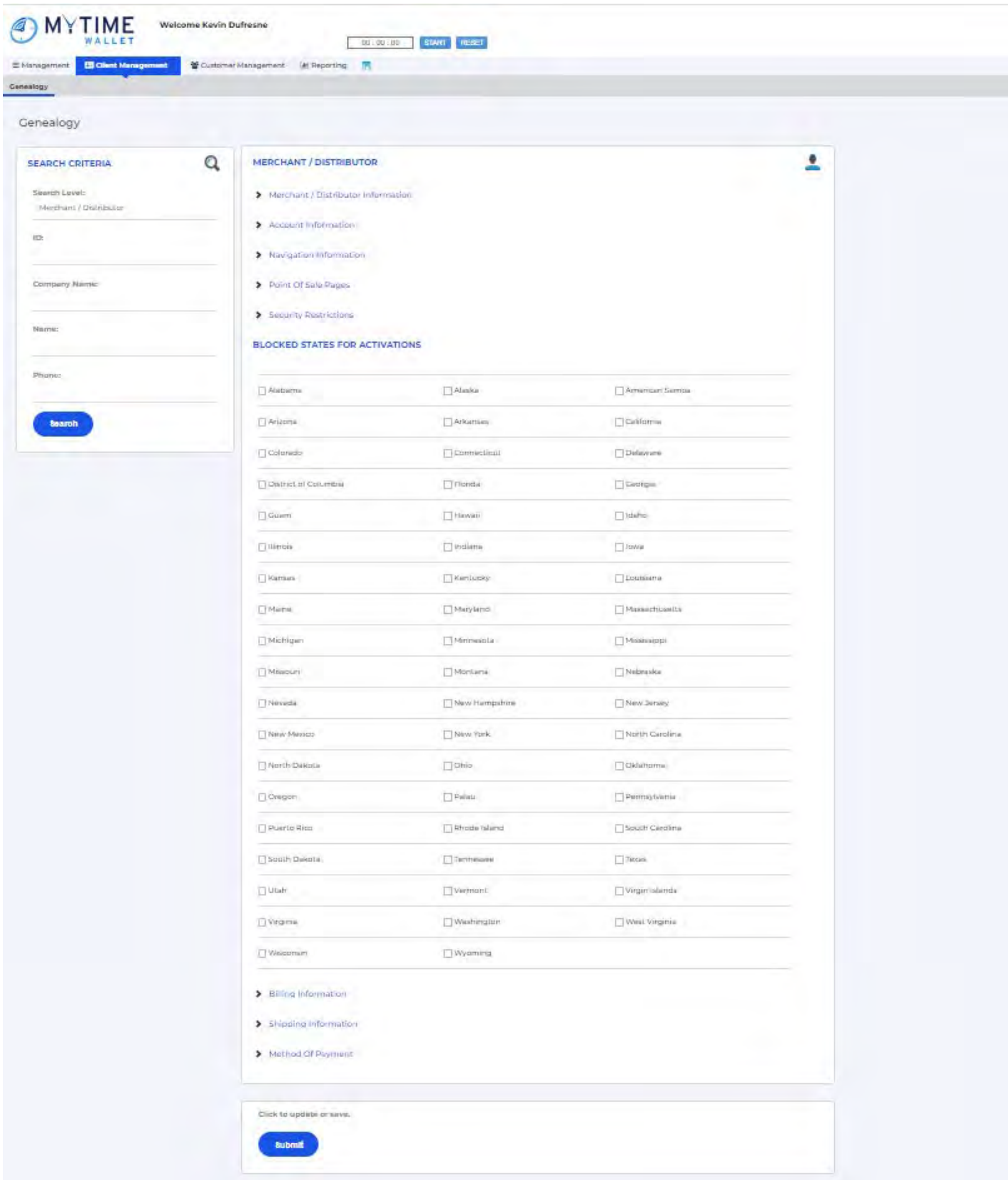
Just like above you can limit what a Merchant / Distributor can and can't sell. For example, if a Merchant / Distributor does not want to sell accessories, or you do not want them to sell accessories, remove the check from Accessory Page.



Security Restrictions

MyTime Agent Portal>Client Management>Create Merchant / Distributor>Security Restrictions

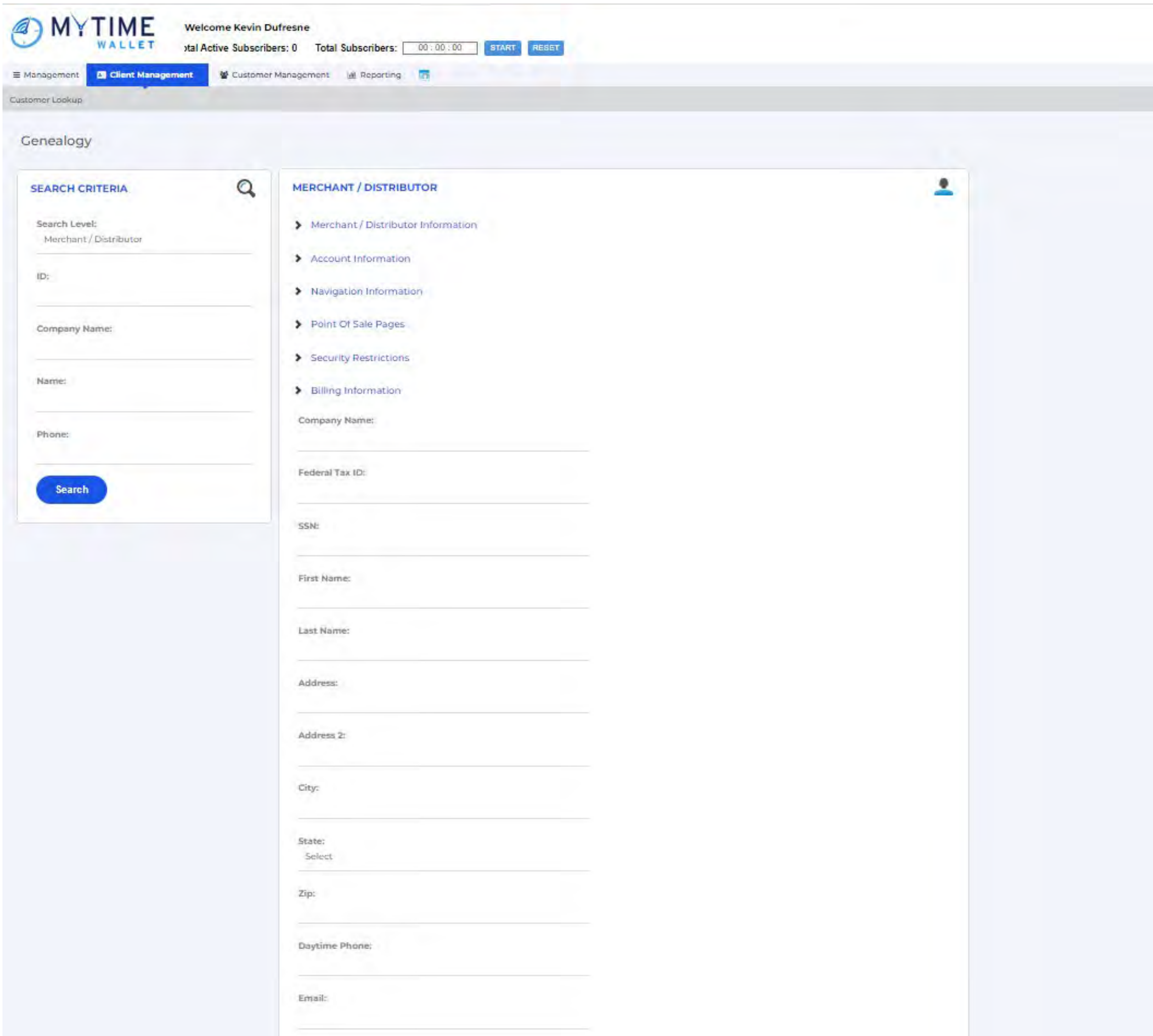
If a Merchant / Distributor can sell services in all 50 states and Puerto Rico, you can leave all of the checkboxes unchecked. If you want to block a Merchant / Distributor from selling to a certain state.



Billing Information

MyTime Agent Portal>Client Management>Create Merchant / Distributor>Billing Information

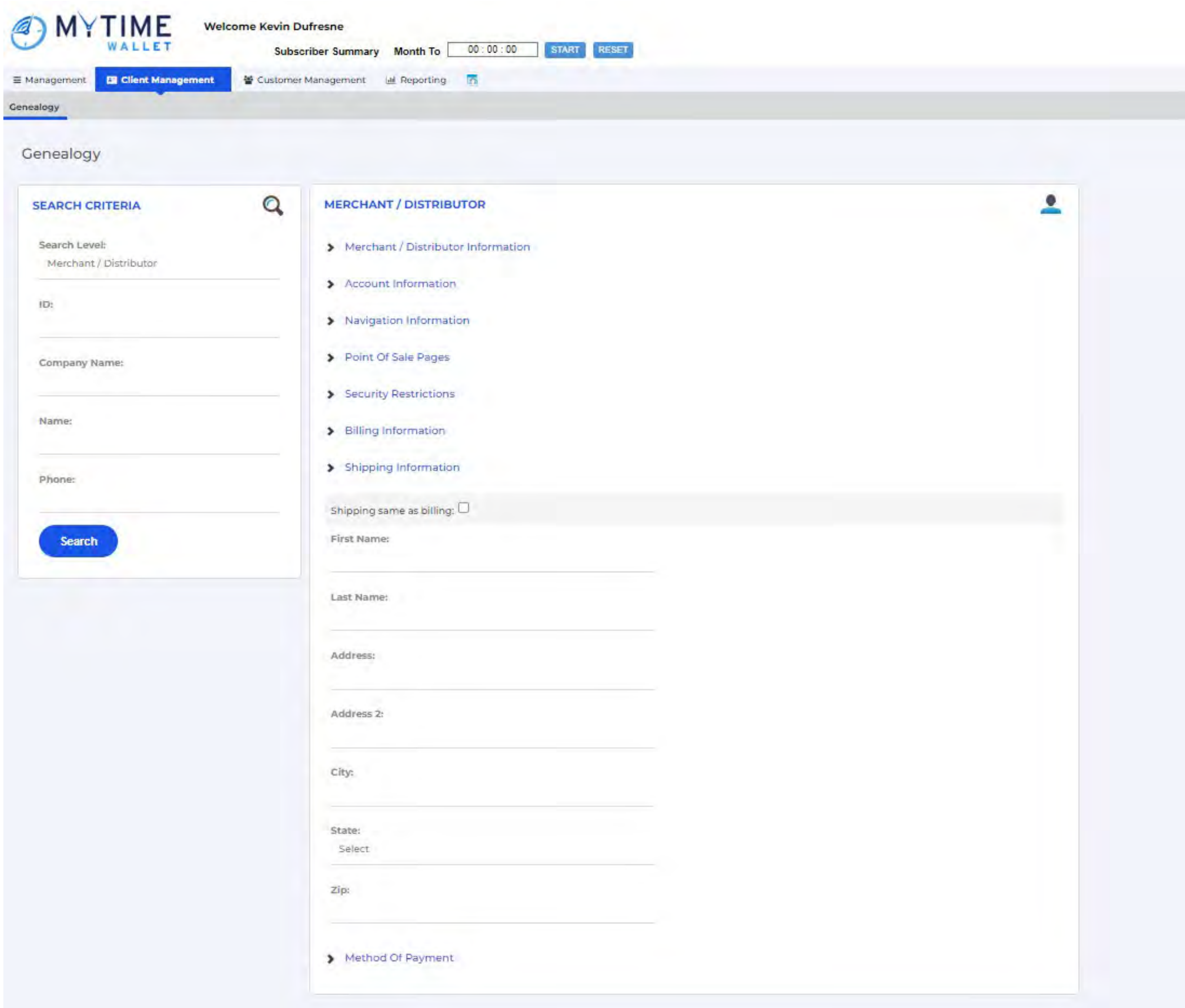
The billing information contains all of the sensitive personal information for the Merchant / Distributor for billing purposes.



Shipping Information

MyTime Agent Portal>Client Management>Create Merchant / Distributor>Shipping Information

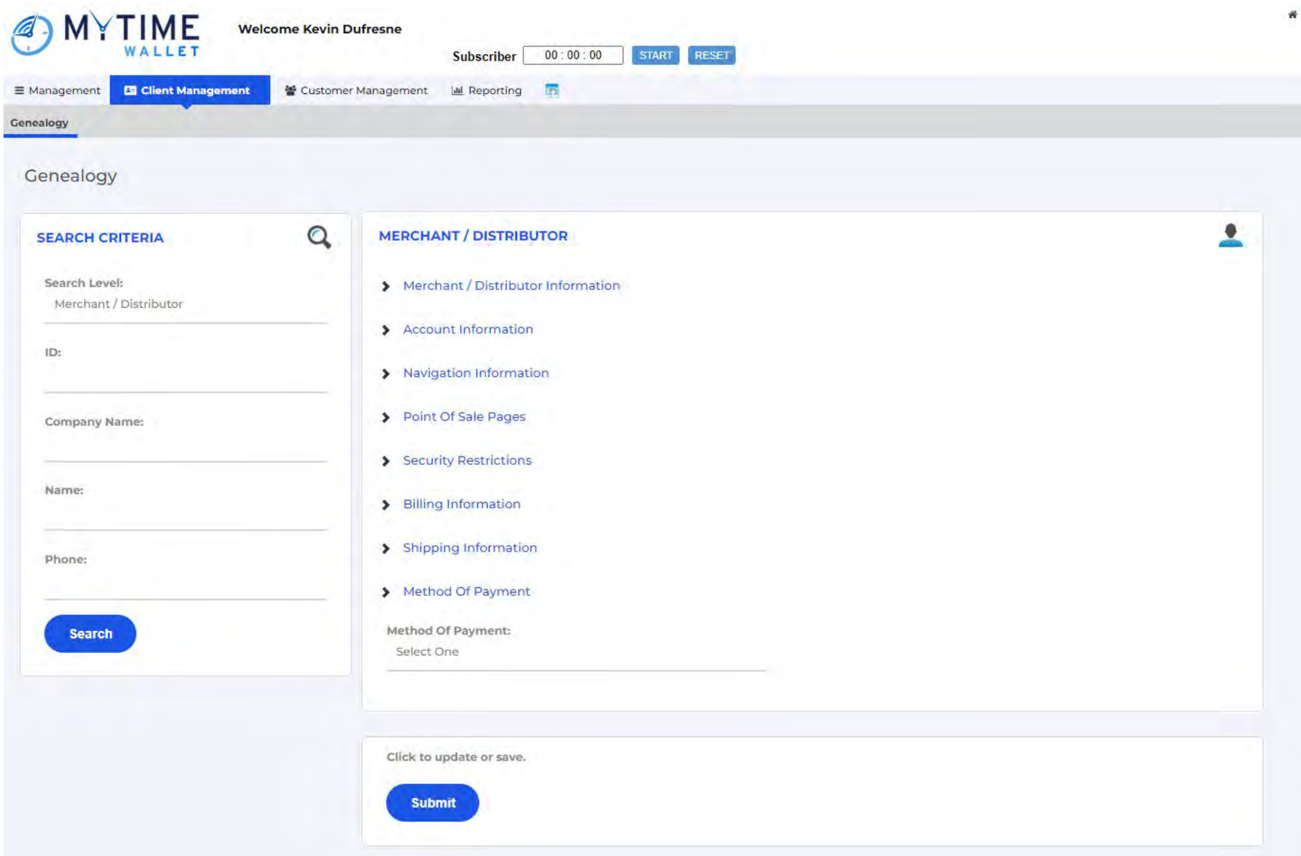
If a Merchant / Distributor's shipping information is different from the billing information, you can enter that here. If it is the same, you can use the Shipping same as the billing check box.



Method of Payment

MyTime Agent Portal>Client Management>Create Merchant / Distributor>Method of Payment

Merchants / Distributors will be using the Mobile Wallet for payment. As an Agent, you may have to create a new Mobile Wallet for them, however, this is where you will connect the Mobile Wallet to the Merchant / Distributor so they can start processing new services and replenishments.

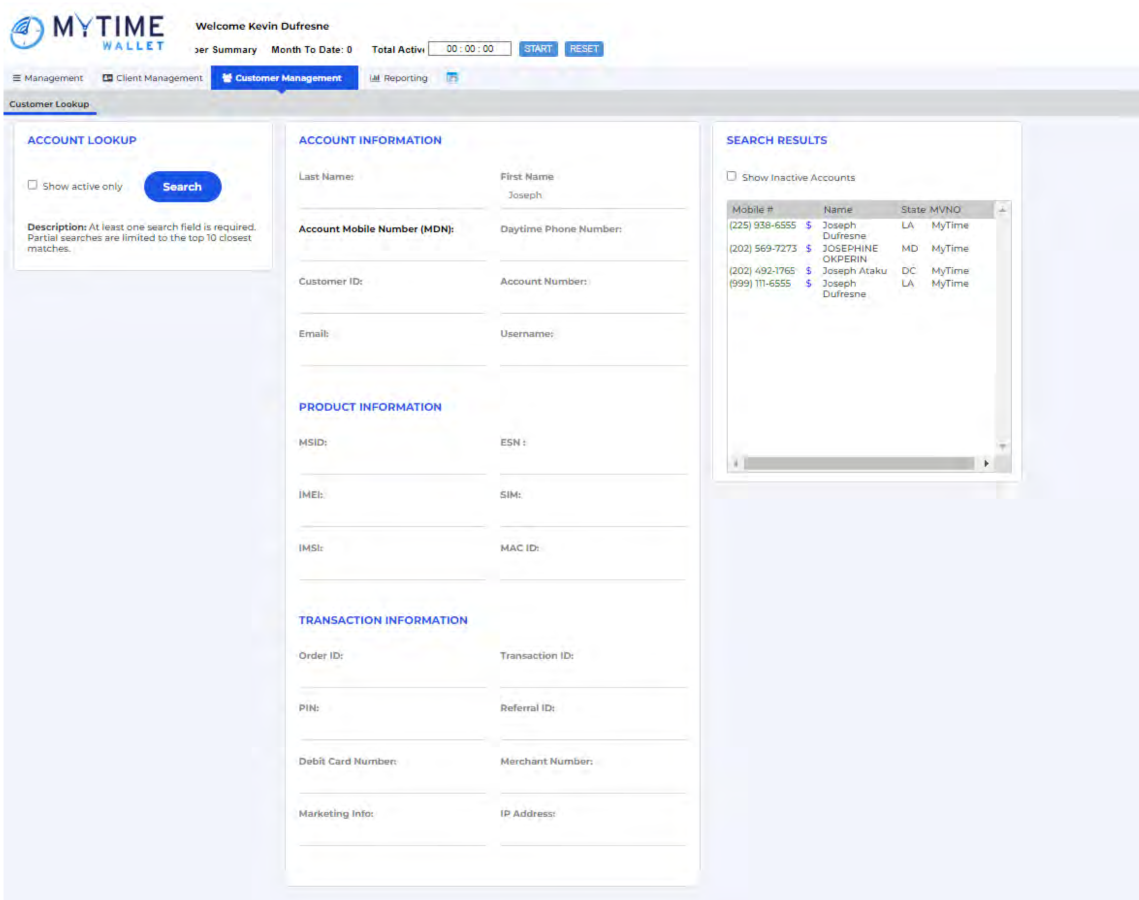


Customer Management/ Customer Lookup:

MyTime Agent Portal>Customer Management>Customer Lookup

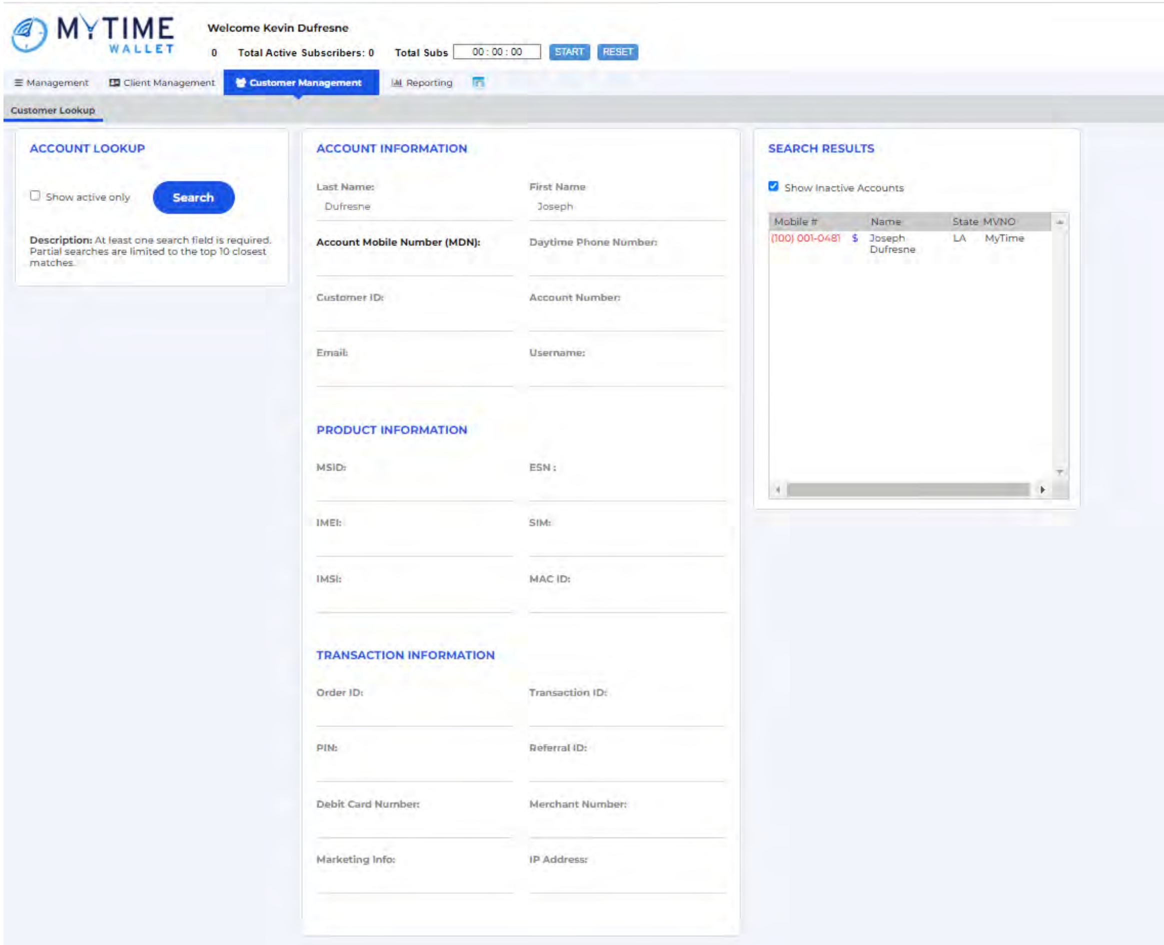
Customer Management provides Agents with the ability to use Customer Lookup and Send SMS fun.

Customer Lookup helps Agents find a customer's account using the lookup tool, you will only find customers created by your Merchant / Distributors.



In the above image, there are several different ways you can look up a customer's account. You can search using the first or last name in the account information section of by using the MDN which is the customers Mobile Wallet Number.

If the customer is not found it could be that the account is not active; to see Inactive accounts, you need to click the box: **Show Inactive Accounts**

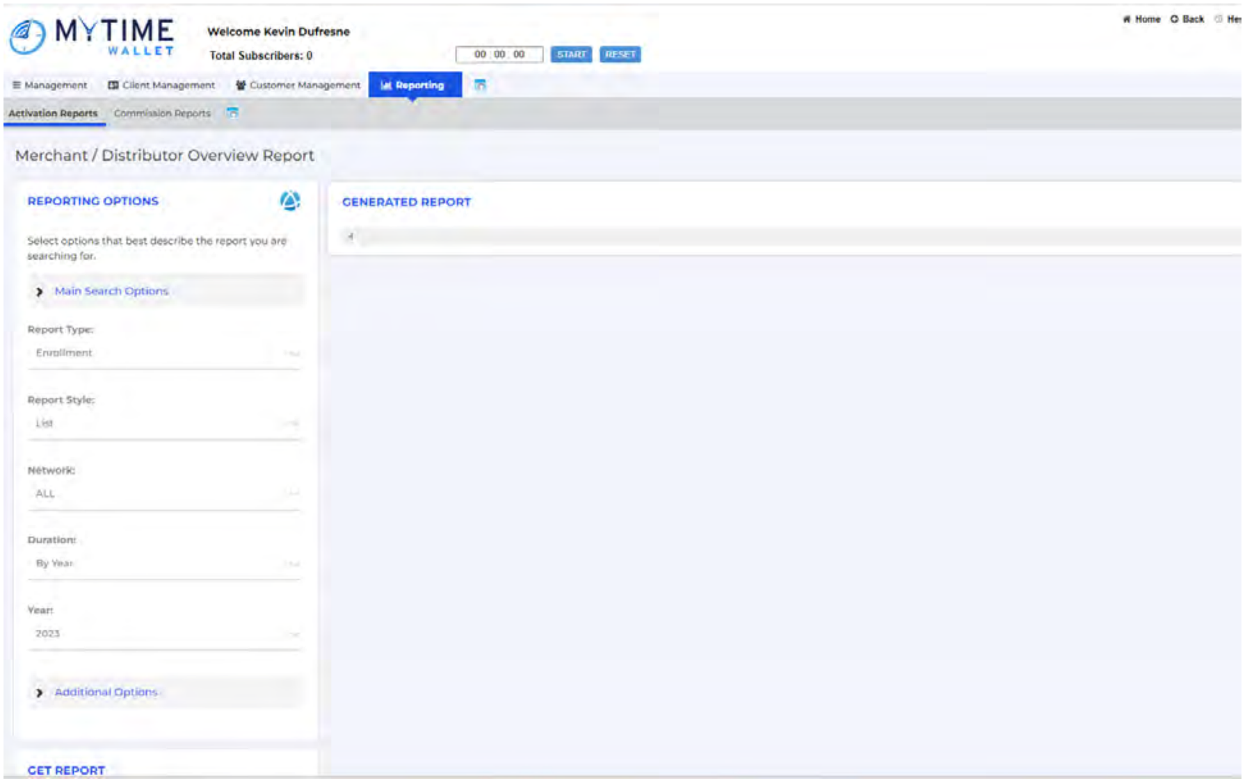


Reporting

Merchant / Distributor Overview Report

MyTime Agent Portal>Reporting>Activation Reports

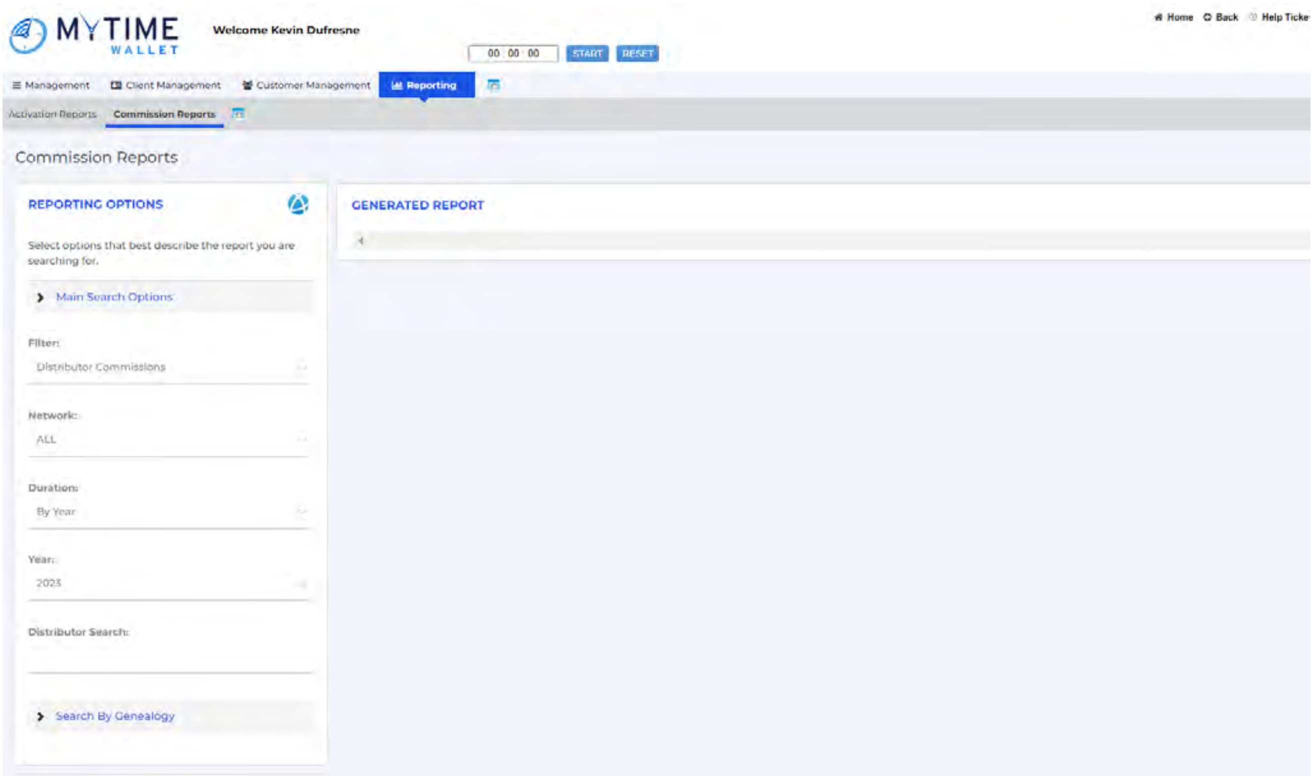
In this report, you will be able to see a list of Activations (Port-Ins included), Replenishments, Orders, and Activations and Replenishments together. You have the option to see this in a list form and in a graph form. You can also separate by individual networks, or all networks together. You can set the Duration either daily or monthly. You will also be able to set the year.



Commissions Report

MyTime Agent Portal>Reporting>Commission Reports

In this report, you will be able to use the same filters as above. This report gives you an additional filter for the Wireless and Mobile Wallet commissions together, or individually so you can see the commissions you are earning.



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