

TappiPay Agent Portal **User Manual**

A walkthrough of onboarding, applications, and the agent dashboard, for agent training and support reference.



- 01** Signing In
- 02** Onboarding
- 03** Agent Home And Applications Dashboard
- 04** Submitting A Merchant Application
- 05** Agent Profile

Signing In

Signing in and Selecting the Agent role

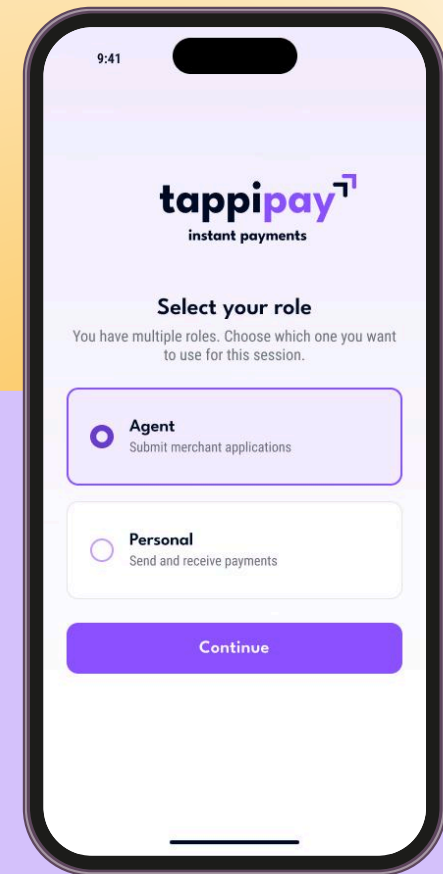
Signing In And Selecting Your Role

Agents sign in the same way as customers:

Phone number plus a **one-time SMS code** (see the Customer manual's Getting Started section for that flow).

If a phone number is linked to both a Personal and an Agent account, this Select your role screen appears after signing in.

Tap **Agent**, then **Continue**, to work in the agent app for that session.



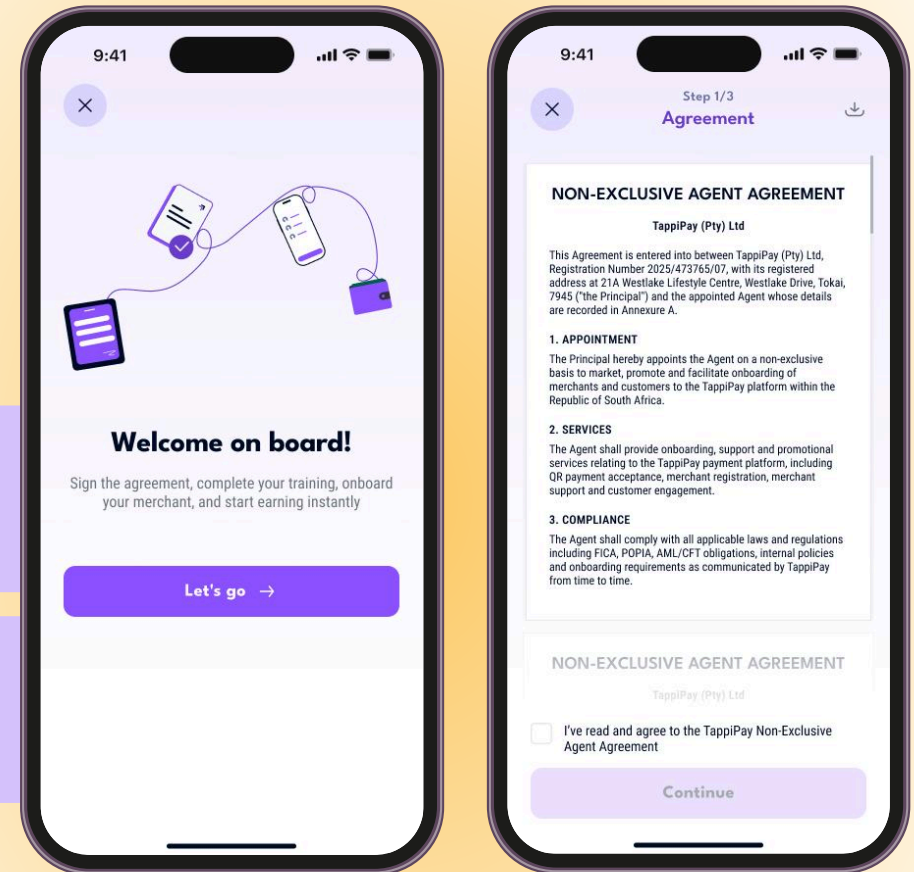
Onboarding

Agreement, your details, training, and the assessment

Welcome And Agreement

New agents are welcomed and asked to ***read and sign*** the Non-Exclusive Agent Agreement before continuing.

The agent must ***tick "I've read and agree"*** before Continue becomes active.



Your Details And Payment Info

Agents ***provide their address*** and ***choose*** how they'll be paid:
By Bank Account or By PayShap ID.

This is the ***agent's own information***,
separate from any merchant details they'll capture later.

9:41

Step 2/3
Agreement

Tell us more about you

Country
South Africa

City
Select city

Street address
Enter street and building #

Apartment number (optional)
Enter Apartment number

Post code
Enter street address

Bank Account PayShap ID

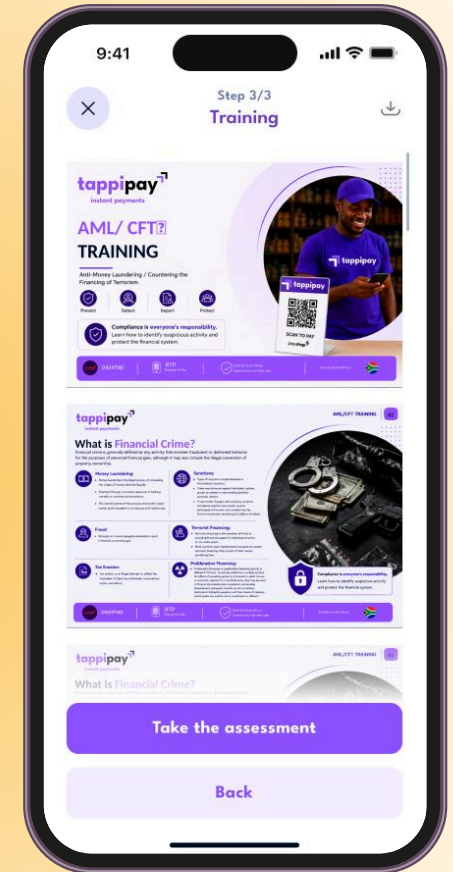
Bank Name
Select bank

Account Number

Completing Training

Agents work through AML/CFT training modules covering onboarding responsibilities and financial crime awareness.

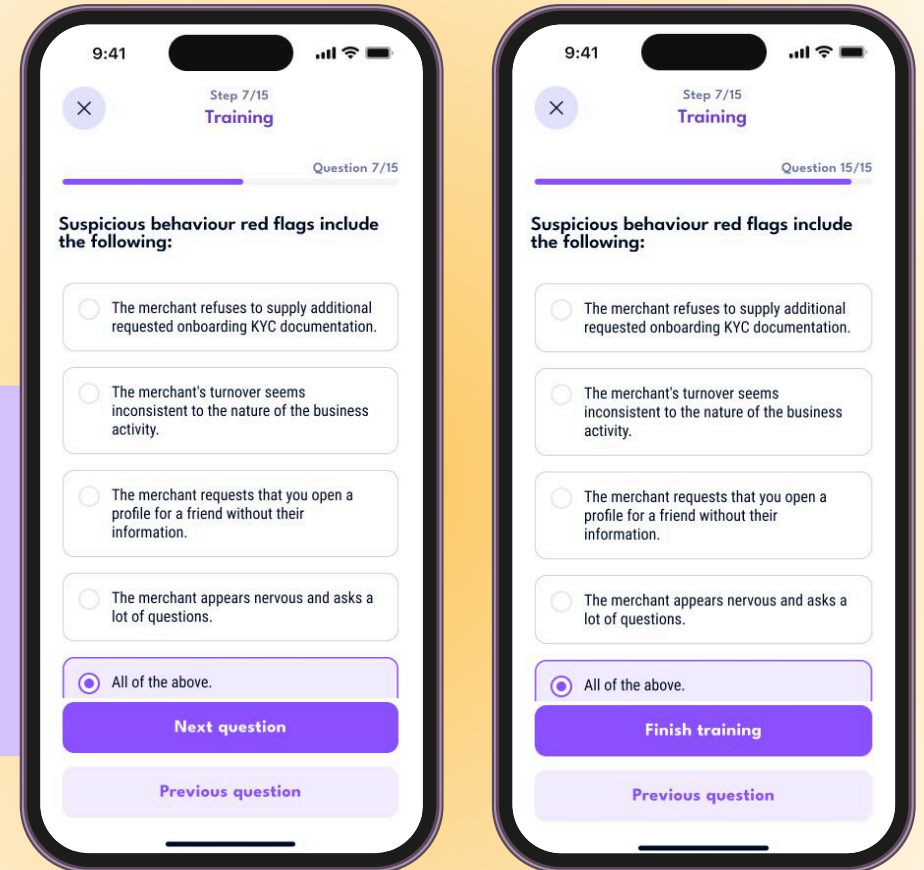
Tap ***Take the assessment*** once all modules have been reviewed.



Taking The Assessment

The assessment is a **15-question multiple-choice quiz** on red flags and compliance scenarios.

Agents can **move between questions** with Next question and Previous question before finishing.

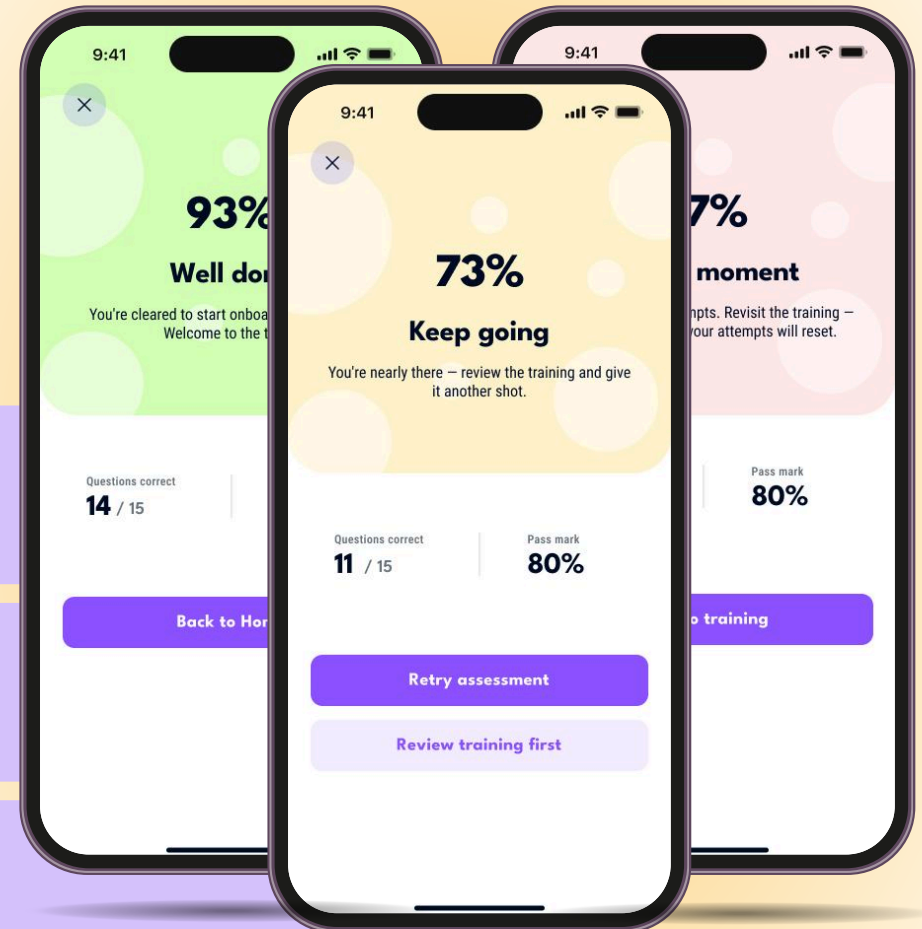


Assessment Results

The pass mark is 80%. Scoring at or above it clears the agent to start onboarding merchants.

Scoring below offers a retry
(***Retry assessment*** or ***Review training first***).

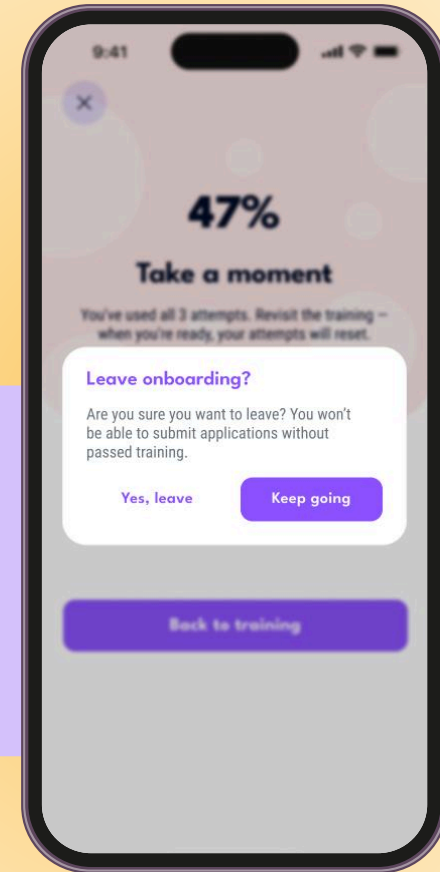
Agents get ***three attempts*** in total; after that, they must ***revisit the training*** and wait before trying again.



Leaving Onboarding Partway Through

If an agent tries to exit before finishing onboarding, a confirmation warns that they won't be able to submit applications until it's complete.

Tap **Keep going** to continue, or **Yes, leave** to exit anyway.



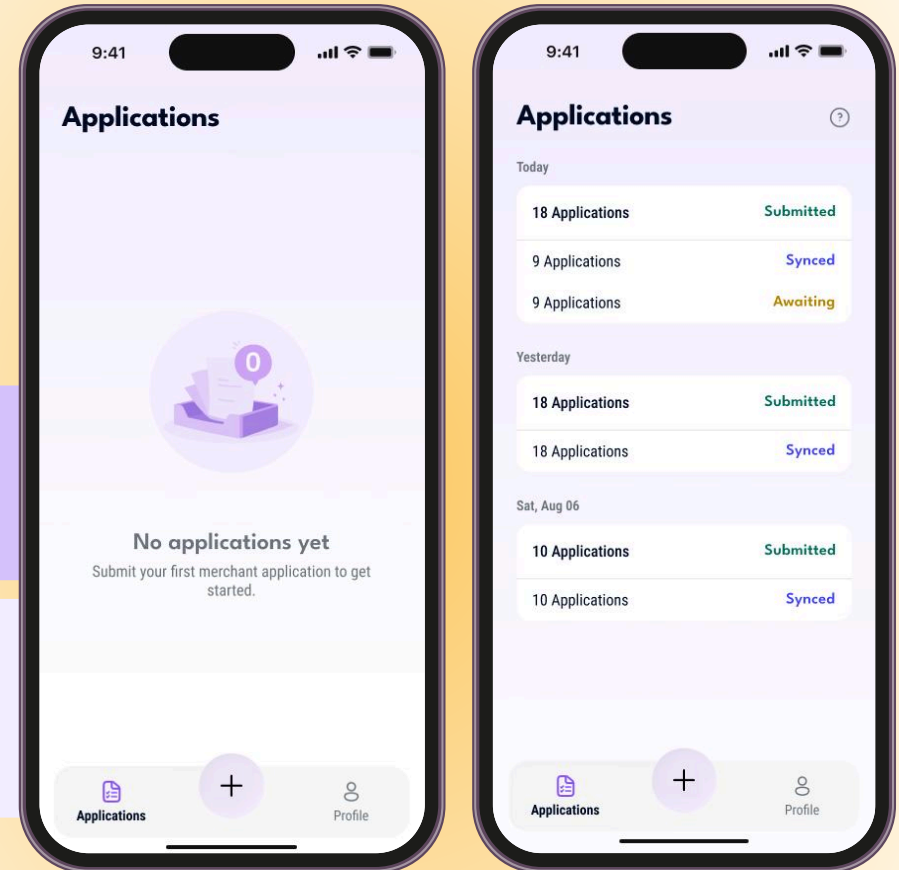
Agent Home And Applications Dashboard

Reading the Applications list and status indicators

The Applications List

Once active, **applications are grouped** by day and show **Submitted, Synced, and Awaiting** counts for each day.

New agents see an empty state prompting them to **submit their first merchant** application.

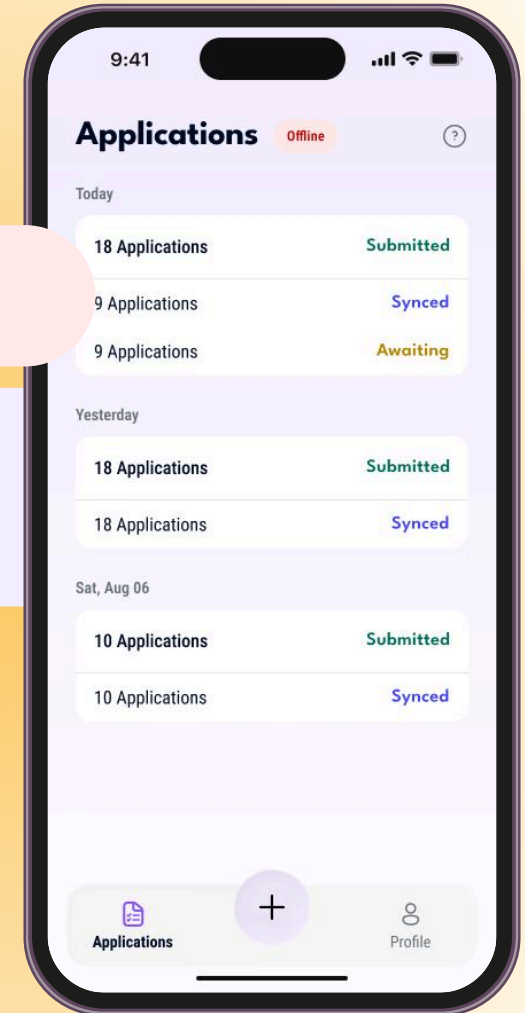


Working Offline

Offline

An Offline badge appears
when there's no connection.

Applications can still be captured while offline;
they'll sync automatically once the connection is restored.



Understanding Application Status

Submitted:

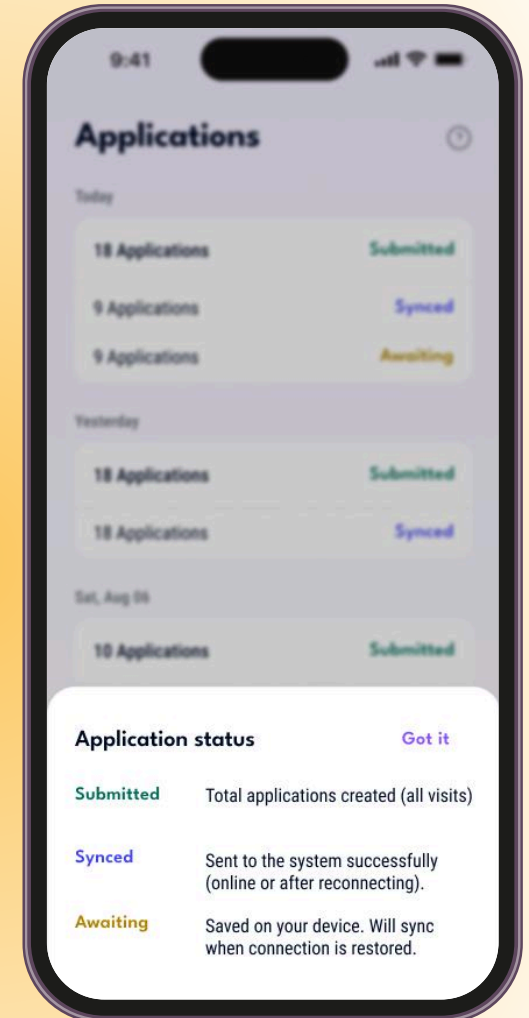
Total applications created this session, across all visits.

Synced:

Sent to the system successfully, whether online at the time or after reconnecting.

Awaiting:

Saved on the agent's device, will sync automatically once connection is restored.



Submitting A Merchant Application

Capturing a new merchant end to end

Personal Information

Tap **+** from the Applications list to start a new merchant application.

Capture the merchant's:

- Name
- Surname
- ID Type
- ID Number
- Date of Birth.

The image shows two smartphones displaying the Tappipay Agent App interface. The foreground phone is at 'Step 1/5' of the 'Personal Information' form. It has a back arrow, a status bar at 9:41, and signal/battery icons. The form fields are: Name (Thabo), Surname (Nkosi), ID Type (ID Card with a dropdown arrow), ID Number (9001015800087), and Date of Birth (01 / 01 / 1990). At the bottom are 'Next step' and 'Cancel application' buttons. The background phone is also at 'Step 1/5' but has a red 'Offline' indicator at the top and empty input fields for Name, Surname, ID Type, and ID Number. It also has 'Next step' and 'Cancel application' buttons at the bottom.

Business Information And Address

Capture

- Business Name
- Business Category
- Registration Number
- Expected turnover (monthly)
- The business address

Confirm whether the agent visited the address in person.

The image displays two smartphone screens side-by-side, showing the Tappipay Agent App interface for submitting a merchant application.

Left Screen (Step 2/5 Business Information):

- Header: Step 2/5 Business Information
- Business Name: Text input field with placeholder "Enter business name".
- Business Category: Dropdown menu with placeholder "Select category".
- Registration Number: Text input field with placeholder "Enter registration number (if registered)".
- Expected turnover, monthly: Radio button selection with three options:
 - ☒ less than R 500,000.00
 - ☐ R 500,000.00 - R 2,000,000.00
 - ☐ more than R 2,000,000.00
- Buttons: "Next step" (purple) and "Cancel application" (light purple).

Right Screen (Step 3/5 Business address):

- Header: Step 3/5 Business address
- Country: Dropdown menu with "South Africa" selected.
- City: Dropdown menu with placeholder "Select city".
- Street address: Text input field with placeholder "Enter street and building #".
- Apartment number (optional): Text input field with placeholder "Enter Apartment number".
- Post code: Text input field with placeholder "Enter street address".
- Checkbox: "I visited this address in person" (unchecked).
- Buttons: "Next step" (purple) and "Cancel application" (light purple).

Payment Information

Capture how the merchant will receive payments:

- Bank Account (bank and account number)
- or PayShap ID.

This determines how the merchant is paid out once they start accepting payments.

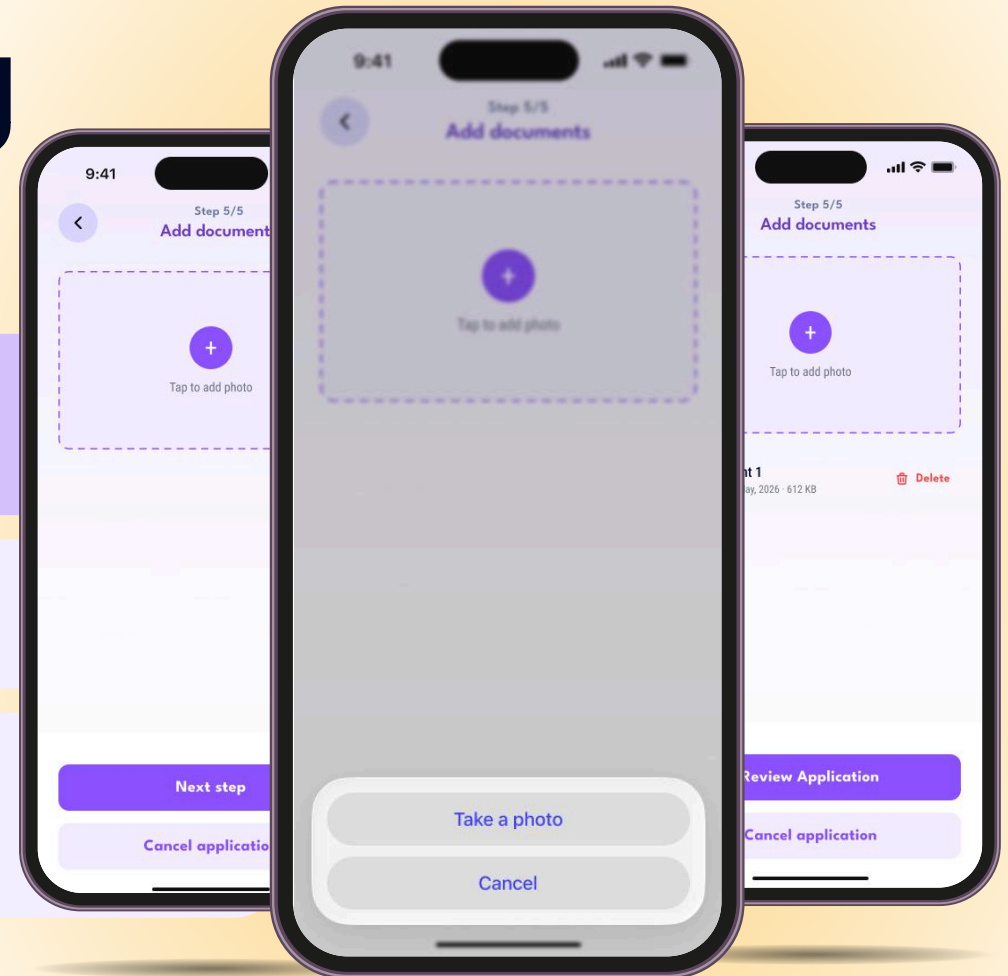
The image displays two smartphone screens side-by-side, both showing the 'Payment Information' screen in the Tappipay Agent App. The screens are in 'Step 4/5' of the application process. The left screen shows the 'Bank Account' option selected, with fields for 'Bank Name' (a dropdown menu) and 'Account Number' (a text input). The right screen shows the 'PayShap ID' option selected, with a text input field for the ID. Both screens have a 'Next step' button and a 'Cancel application' button at the bottom.

Adding Supporting Documents

Tap to **add a photo** of the merchant's supporting document, such as an ID card.

Take a photo directly or cancel to go back.

Added documents can be **deleted** and **re-added** before moving on to Review Application.



Reviewing An Application

Review Application shows everything in one place:

- Personal Information
- Business Information
- Payment Information
- The uploaded document.

Each section has an **Edit** link to jump back and correct it before submitting.

Send for approval submits the application
Discard application cancels it

The image shows three overlapping smartphone screens displaying the 'Review Application' form in the Tappipay Agent App. The screens are arranged diagonally from bottom-left to top-right.

Screen 1 (Left): Shows the 'Review Application' title and a back arrow. Below it, the 'Personal Information' section is visible, showing fields for First Name (Thabo), Last Name (Nkosi), ID Type (ID Card), ID Number (9001015800087), and Date of Birth (01 / 01 / 1990).

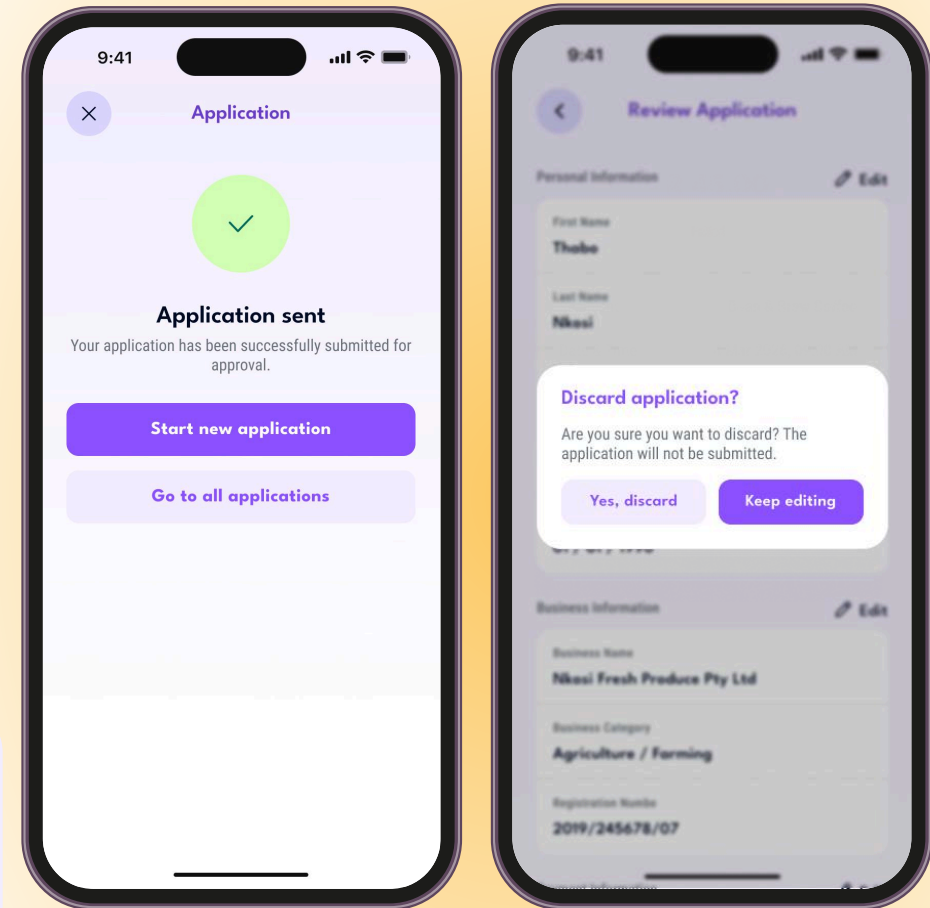
Screen 2 (Middle): Shows the 'Business Information' section. Fields include Business Name (Nkosi Fresh Produce Pty Ltd), Business Category (Agriculture / Farming), Registration Number (2019/245678/07), and Expected turnover (less than R 500,000.00).

Screen 3 (Right): Shows the 'Payment Information' section. Fields include PayShap ID (0824567890), Bank Name (First National Bank), and Account Number (62345678901). Below this is the 'Document' section, which displays an uploaded ID card image. The ID card is a South African National Identity Card for Thabo M. Nkosi, with ID number 0123456789012. At the bottom of the screen, there are two buttons: 'Send for approval' (purple) and 'Discard application' (light purple).

Confirmation And Discarding

A successful submission is confirmed immediately, with options to *Start new application* or *Go to all applications*.

Discarding an application, whether in progress or already reviewed, requires **confirmation** since it **cannot be recovered** afterwards.



Agent Profile

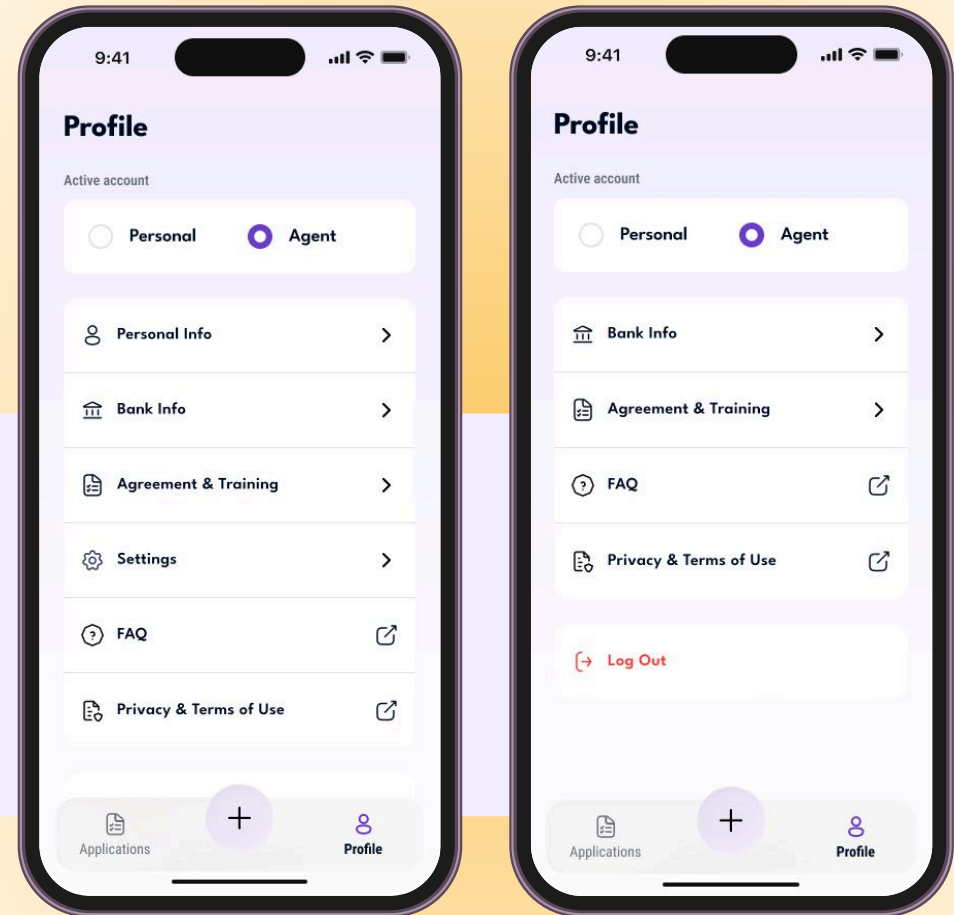
Personal info, bank info, agreement, and training

Profile Menu

Here lies:

- Personal Info
- Bank Info
- Agreement & Training
- Settings
- FAQ
- Privacy & Terms of Use
- Log Out

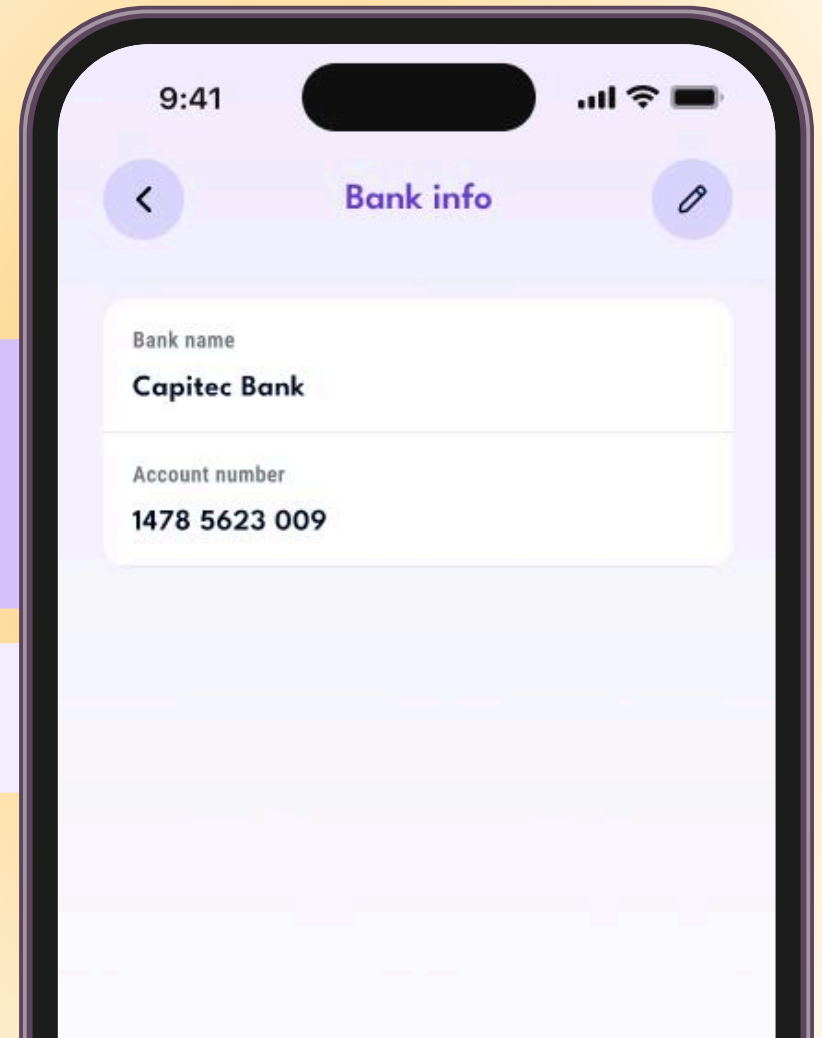
Agents with **both** a **Personal** and an **Agent account** can **switch** between them from this screen.



Bank Info

Shows the ***bank account used to pay the agent***, separate from any merchant payment details captured in applications.

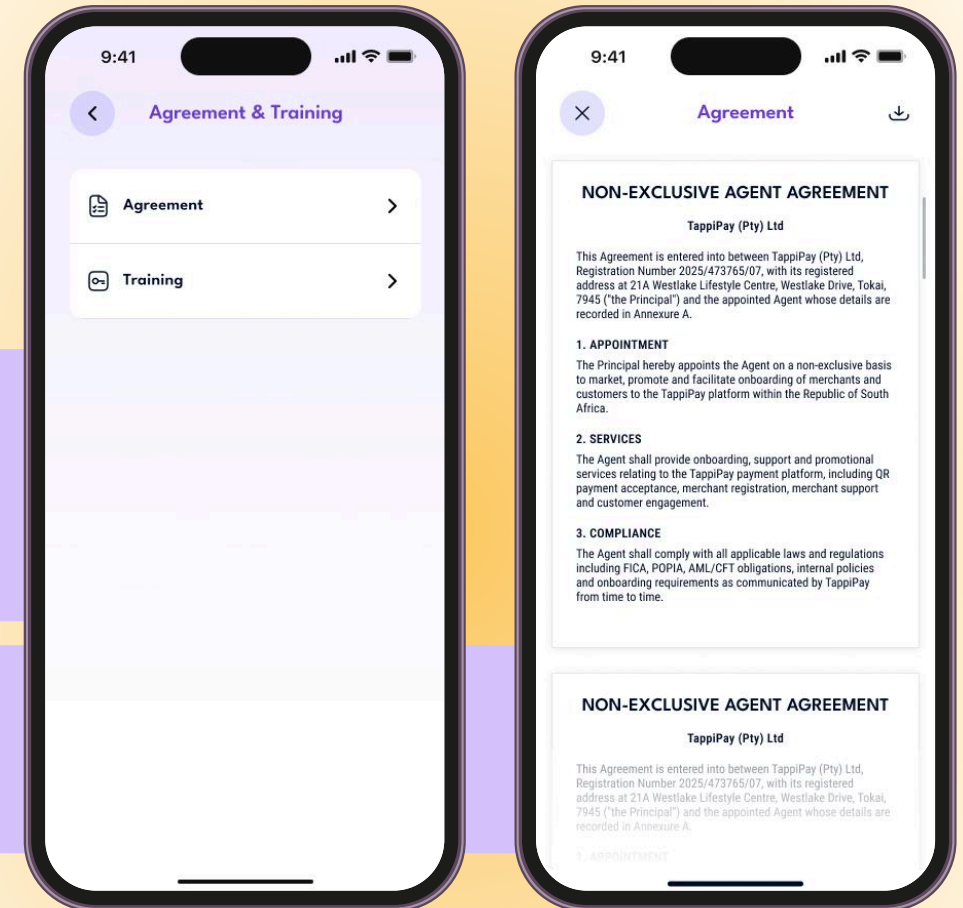
Tap the ***edit*** icon to update it.



Agreement And Training

Agents can **revisit** their signed Agreement and completed Training modules at any time from Profile.

This is a **read-only view**; the agreement itself was accepted during onboarding.



Need Help?

This manual covers the core agent flows as designed to assist in a successful agent onboarding.

If any issues are faced, contact: admin@tappipay.co.za for assistance.