



Manage: Account & Banking Setup

## Training Manual

Parent SOP: Manage: System Overview & Basics| Estimated Time 15 minutes



## 1. Objective

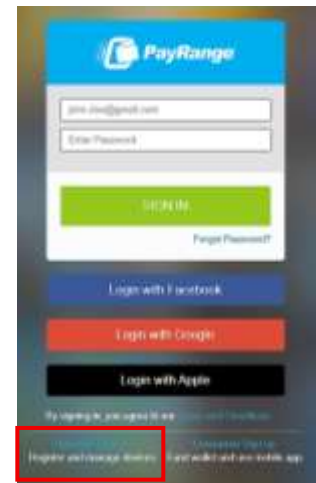
To help guide new operators through the initial configuration of the PayRange Manage platform. By the end of this module, the user will have a verified Operator account and a linked bank account ready to receive ACH deposits.

## 2. Account Creation

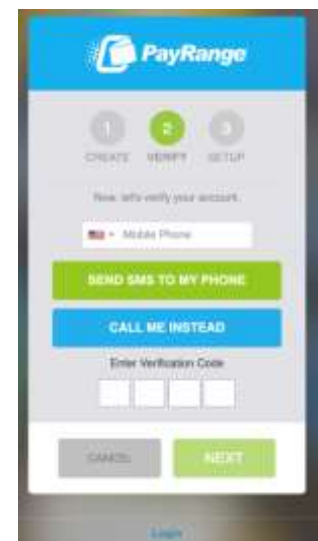
Use this section to establish a new Operator identity. If you already have a consumer account (used for paying for laundry/vending), skip to "Option B."

### Option A: Creating a New Account

1. Access the Platform:
  - a. Open a web browser and navigate to:  
<https://manage.payrange.com/#/login/>
2. Sign Up:
  - a. Select "Operator Sign up" at the bottom left of the page, see **Figure 1**.
3. Credentials:
  - a. Enter the following information:
    - Your Name
    - Email
    - Confirm Email
    - Password
      - Create a secure password (minimum 6 characters)
  - b. Click "Next".
4. Mobile Verification:
  - a. Enter your mobile phone number.
  - b. Click "Send SMS To My Phone" to receive a text with the 4-digit verification code, see **Figure 2**.
    - If you prefer an automated call with the 4-digit code you may click "Call Me Instead"
  - c. Enter the 4-digit code under "Enter Verification Code".
  - d. Click "Next"



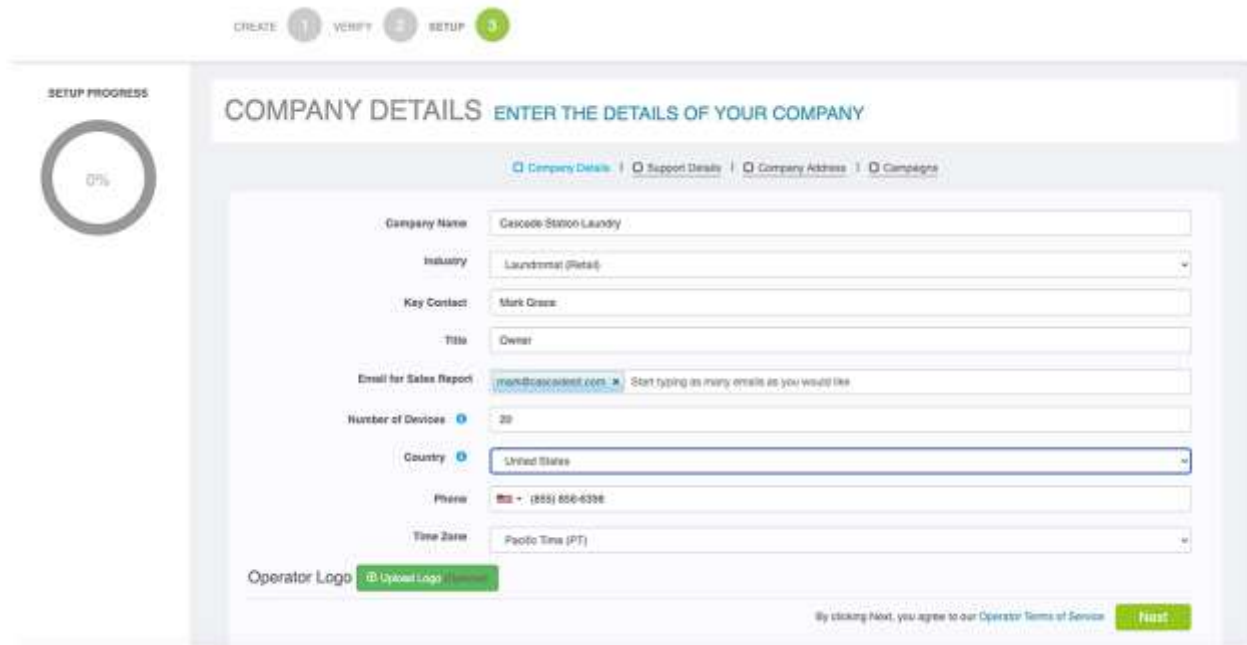
**Figure 1**



**Figure 2**

5. Company Details:

- a. Fill in the required details (Company Name, Contact Information, etc.) see **Figure 3**.
- b. Click “Next” on the bottom right of the screen.



The screenshot displays the 'COMPANY DETAILS' setup screen. At the top, there are three steps: 'CREATE' (1), 'VERIFY' (2), and 'SETUP' (3, highlighted in green). On the left, a 'SETUP PROGRESS' section shows a circular progress indicator at 0%. The main form area is titled 'COMPANY DETAILS ENTER THE DETAILS OF YOUR COMPANY'. Below this, there are four tabs: 'Company Details' (selected), 'Support Details', 'Company Address', and 'Campaigns'. The form fields are as follows:

- Company Name: Cascode Station Laundry
- Industry: Laundromat (Retail)
- Key Contact: Mark Green
- Title: Owner
- Email for Sales Report: mark@cascode.com (with a note: 'Start typing an every email as you would like')
- Number of Devices: 20
- Country: United States
- Phone: +1 (855) 656-6398
- Time Zone: Pacific Time (PT)

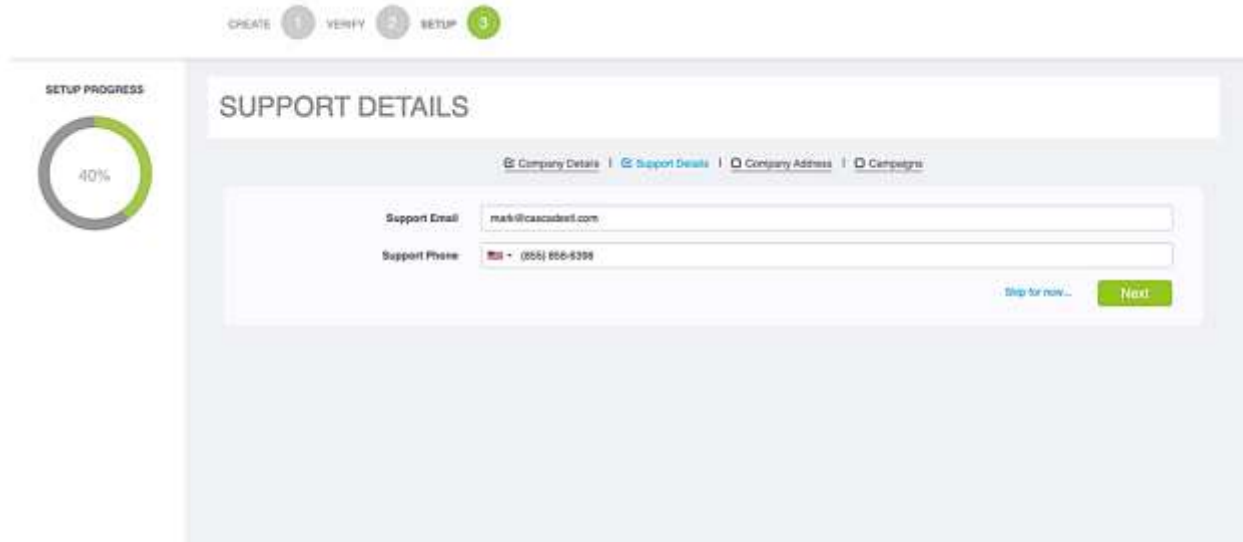
At the bottom left, there is an 'Operator Logo' field with an 'Upload Logo' button. At the bottom right, there is a 'Next' button and a note: 'By clicking Next, you agree to our Operator Terms of Service'.

**Figure 3**

6. Support Details:

- a. Enter your company’s contact information for support, including the email address and phone number (**Figure 4**).

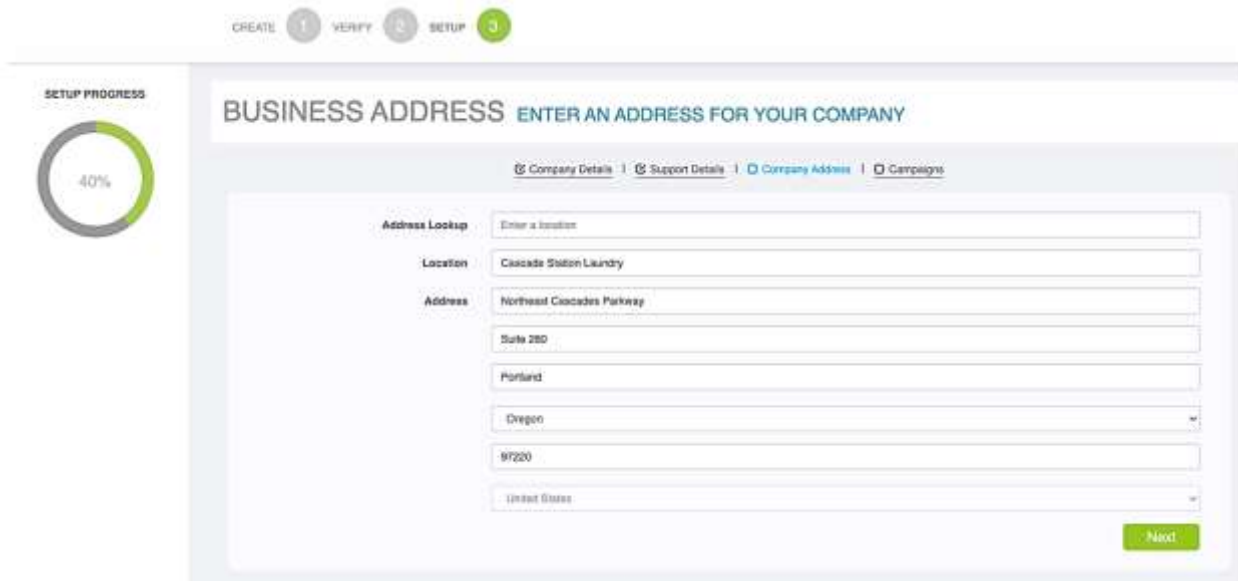
b. Click "Next"



**Figure 4**

7. Business Address:

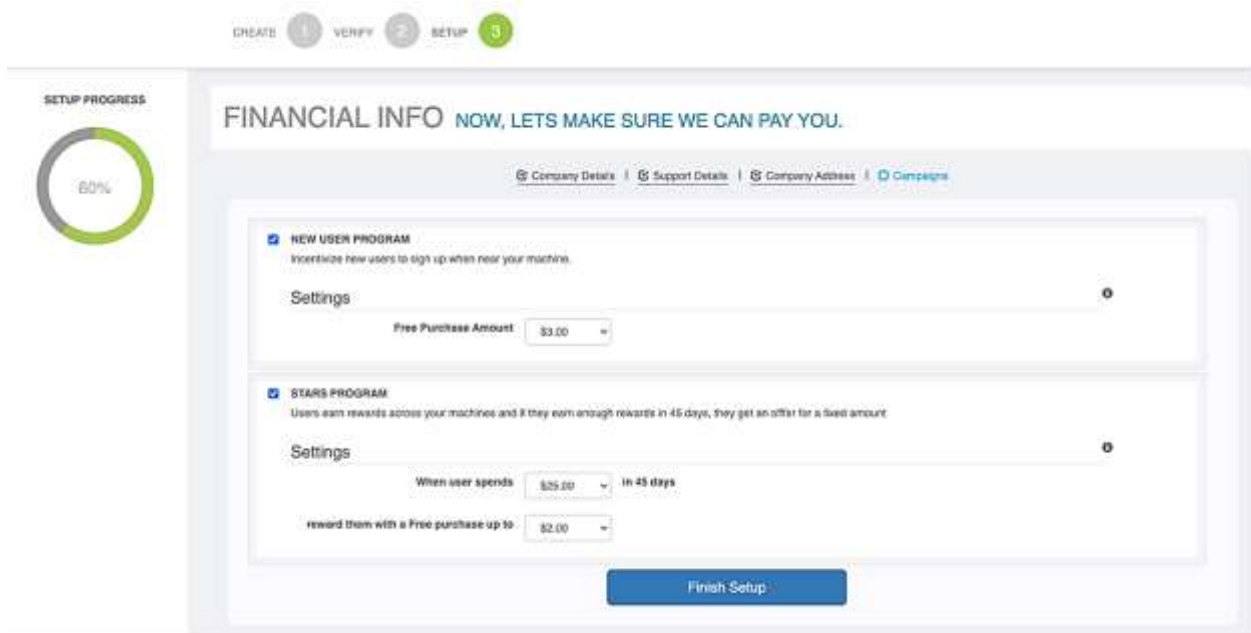
- a. Fill in the company's address details, **Figure 5**.
- b. Click "Next".



**Figure 5**

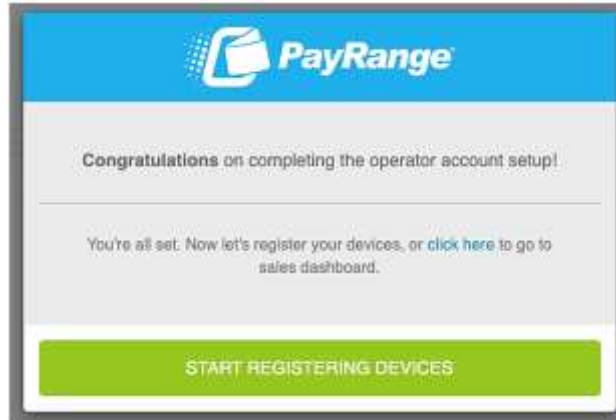
8. Marketing Campaigns (Final Step):

Campaigns serve as loyalty programs for your customers. By default, campaigns are automatically configured **ON**.



**Figure 6**

- If you **do not wish to offer** the “New User Program” or “Stars Program”, or prefer to activate them later, uncheck the box next to the campaign name.
  - If you **do wish to offer** one or both programs, you may leave the default settings as is or adjust the currency amount using the drop-down menu within each campaign.
  - Once complete, click the blue “Finish Setup” button at the bottom of the page (see **Figure 6**).
9. After completing the setup process, a confirmation pop-up will appear (see **Figure 7**). Click the green “Start Registering Devices” button to initiate BluKey device registration.



**Figure 7**

## **Option B: Converting a Consumer Account**

If you have already created a consumer account, you can convert that consumer account into an operator account.

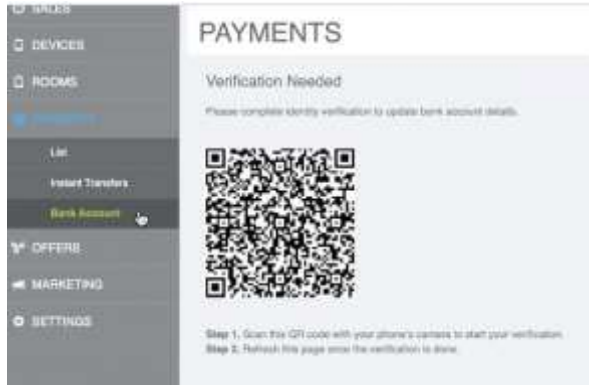
1. Log In:
  - a. Open a web browser and navigate to:  
<https://manage.payrange.com/#/login/>
  - b. **Enter the credentials for your consumer account.**
  - c. **Click "Sign In"**
2. On the main dashboard, click the link on the right side labeled "Create an Operator Account".
3. Fill out the business details to update your status to "Operator."

## **3. Banking Setup (Required for Payouts)**

*This step requires identity verification to comply with banking regulations. You cannot receive money until this is completed. This step also requires a mobile device.*

1. **Navigate to Banking:**
  - a. Log in to your Manage account.
  - b. Click "PAYMENTS" on the left sidebar.
  - c. Select "Bank Account" from the sub-menu (see **Figure 8**).
2. **Identity Verification (mobile device required):**
  - a. The screen will display a **QR Code**.

- b. Open the camera app on your smartphone and scan the code.
- c. This will launch the secure **Immi** verification tool on your phone (**Figure 9**).



**Figure 8**



**Figure 9**

### 3. Complete Mobile Steps:

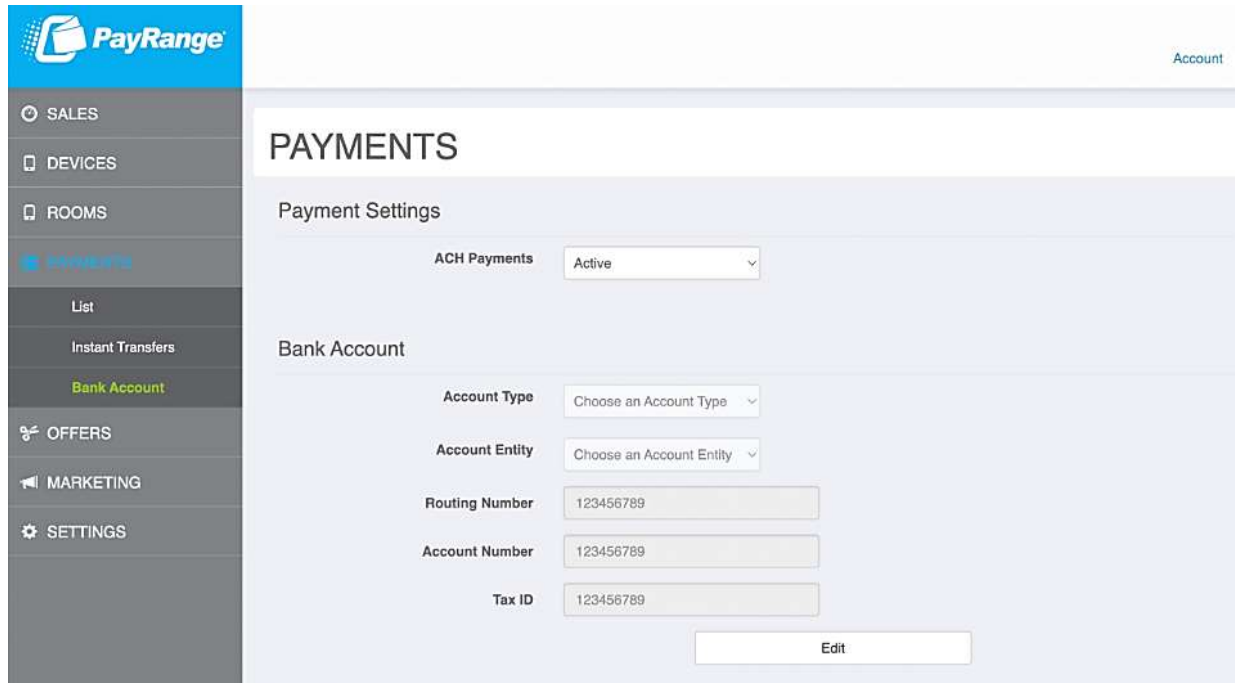
- a. Follow the prompts on your phone to:
  - Scan the **Front** of your Driver's License/ID.
  - Scan the **Back** of your Driver's License/ID.
  - Take a live **Selfie** to confirm identity.

### 4. Enter Financial Data:

- a. Once the phone displays "Success" return to your computer.
- b. Refresh the web browser page. The banking fields will now allow you to edit.
- c. Click the "Edit" button at the bottom of the page to enter your (see **Figure 10**):
  - **Routing Number**,
  - **Account Number**, and
  - **Tax ID** (EIN or SSN).

### 5. Save:

- a. Click "Update Banking" to save your credentials.



The screenshot shows the PayRange interface. On the left is a navigation menu with options: SALES, DEVICES, ROOMS, Instant Offers, List, Instant Transfers, Bank Account (highlighted), OFFERS, MARKETING, and SETTINGS. The main content area is titled 'PAYMENTS' and contains 'Payment Settings' and 'Bank Account' sections. Under 'Payment Settings', 'ACH Payments' is set to 'Active'. Under 'Bank Account', there are five input fields: 'Account Type' (dropdown), 'Account Entity' (dropdown), 'Routing Number', 'Account Number', and 'Tax ID', all containing the value '123456789'. An 'Edit' button is located at the bottom right of the form.

Figure 10

## 4. Troubleshooting Common Issues

- **"I didn't get the SMS text":** Ensure you entered the correct mobile number. If the issue persists, check if your phone provider blocks "Short Code" messages.
- **"The QR Code isn't working":** Ensure your computer screen brightness is up. If your camera won't read it, you may be able to select a "Text me a link" option if available on screen.
- **"Verification Failed":** Ensure you are in a well-lit room when taking the photo of your ID and your selfie. Glare on the ID card is the most common cause of failure.