



M-PESA BUSINESS TO CUSTOMER

External User Guide
Bulk Payment

Safaricom PLC



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1. INTRODUCTION

Welcome to the M-PESA Business to Customer facility.

This facility will enable your Organization to send payments to individual M-PESA users in bulk.

Access to the M-PESA web administration system will enable you to monitor the payments that you will make.

You will be able to download a statement which is a record of payments made.

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

2. M-PESA WEB SYSTEM CERTIFICATE APPLICATION PROCESS

To access the M-PESA website <https://org.ke.m-pesa.com> a 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. One certificate is valid per user profile.

The application process is simple.

The process is as follows:-

Certificate Application

Certificate Installation

Note that the application must be made on:-

Windows explorer version 7/8/9/10.

Windows XP, 7/8 or Vista.



3. WEB ACCESS GUIDELINES

3.1 CREATION OF USERNAMES

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 EMAIL ADDRESSES

Valid official email 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 currently employed in your organization. Whenever an individual leaves an organization; their web access **MUST** be closed immediately. 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

M-PESA web transactions operate under a **Maker-Checker principle**.

This means that for each web transaction, there must be at least two individuals necessary for its completion.

While one individual initiates a transaction, the other individual is involved in confirmation.

4. WEB OPERATOR CREATION AND FUNDS TRANSFER

Log in to M-PESA System as the Business Administrator created by Safaricom.

- Enter you **User Name** as was provided by Safaricom.



- Enter your **Password** (Note the requirement is that the password must be a strong password i.e. alphanumeric with a mix of small and capital letters e.g.(Password01)
- Enter your Organization **Short Code**
- Click on **Log In**

- Enter a One Time Password received via sms on the notification number put during creation. The OTP times out after 60 seconds.

Then **submit**.



4.1 CREATING A WEB OPERATOR

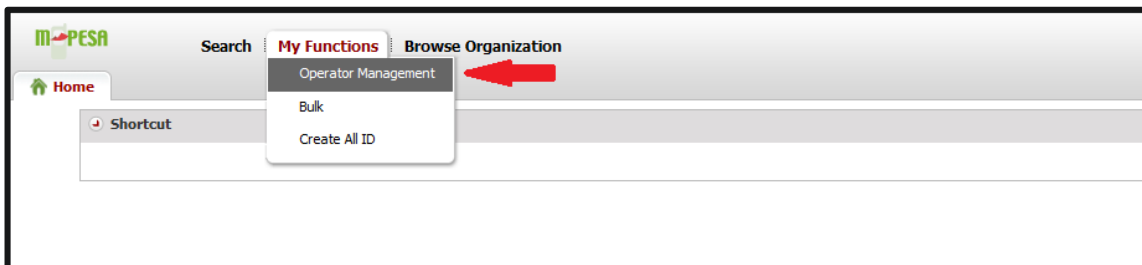
The Business Administrator is created by Safaricom and given the mandate to create and manage other operators but cannot transact on the system.

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.

To create a new user (Business Operator) Admin will

- ✓ Select **My Functions**
- ✓ Click on **Operator Management** as shown below



Select Add

The screenshot shows the 'Organization Operator' management page. It features a search form with fields for Organization Short Code, Operator ID, Role, Middle Name, Date of Birth, Status, User Name, First Name, Last Name, and a 'Sorting Query Results By' dropdown. At the bottom left, there is a table with columns for ID, Organization Short Code, Organization Name, Operator ID, User Name, First Name, Middle Name, Last Name, Date of Birth, Role, Status, and Susp. A red box highlights the 'Add' button, and a red arrow points to it.

The Create Organization Operator page will open at the **Identity Info**, enter the details below.



- Organization short code
- Authentication Type
- User Name
- Language

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

Organization Short Code: 339911

Language: English (Kenya)

Organization Name: Travellers Enterprise

Trust Level: Top Organization Level 3

Authentication Type: Web Handset API

User Name: _____

Next Cancel

- The **Create Organization Operator** page will open >Select **Assign**
- Select the desired **Rule Profile** from the drop down button
- Select a role e.g. Business Web Operator>Click OK

Create Organization Operator

Identity Info | Assign | KYC Info | Review

Rule Profile: Web Operator Rule Profile

Role: Business Web Operator

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



Confirm and Click Next

M-PESA Search | My Functions | Browse Organization M-PESA Organization Portal jkmaina My Preference ?

Home Operator Manage...

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	Effective Date	Expiration Date
Business Web Operator	30/12/2014	31/12/2099

Previous Next Cancel

Create Organization Operator page will open at the KYC Info stage.

Enter KYC info and click next, Add:

- Personal details
- ID details
- Contact details



M-PESA Search | My Functions | Browse Organization M-PESA Organization Portal jkmaina My Preference

Home Operator Manage...

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 Julius Middle Name
 * Last Name Kinyua * Date of Birth 30/12/2014
 Gender Male Female Email
 Nationality Kenyan Preferred Contact Phone Number

ID Details

* ID Type National ID * ID Number 9989832

Contact Details

* Preferred Notification Channel Email Notification Receiving MSISDN 254727400207
 * Notification Receiving E-mail jkmaina1@safaricom.co.ke

Previous **Next** Cancel

Confirm all details and Click **Submit**

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

Identity Info

Organization Short Code 339911 Language English (Kenya)
 Authentication Type Web User Name jkmaina2

Assign

Rule Profile Web Operator Rule Profile

Role	Effective Date	Expiration Date
Business Web Operator	30/12/2014	31/12/2099

KYC Info

Personal Details

First Name Julius Middle Name
 Last Name Kinyua Date of Birth 30/12/2014
 Gender Male Email
 Nationality Kenyan Preferred Contact Phone Number

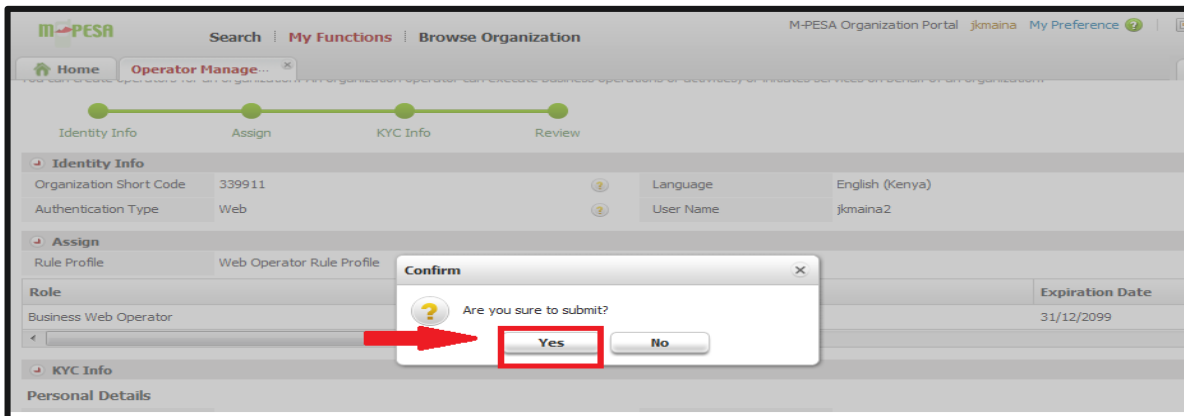
ID Details

ID Type	ID Number	ID Expiry Date
National ID	9989832	

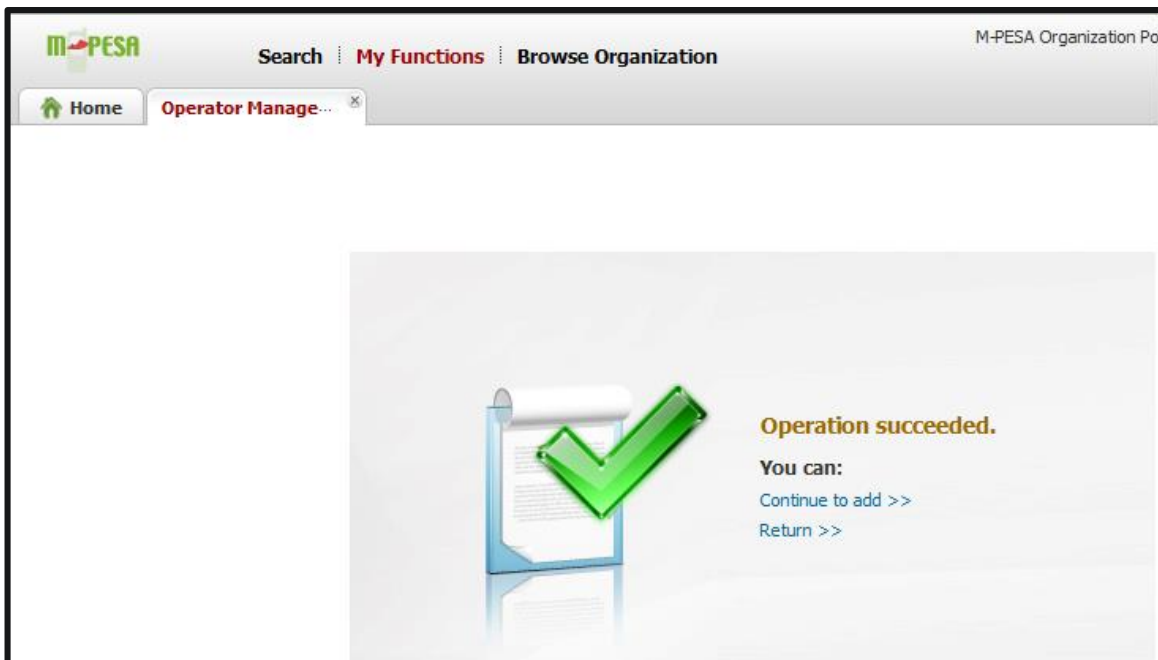
Contact Details

Preferred Notification Channel Email Notification Receiving MSISDN 254727400207
 Notification Receiving E-mail jkmaina1@safaricom.co.ke

Previous **Submit** Cancel



Operation succeeds.



M-PESA USER ROLES

Roles are a set of permissions on what a user created can and cannot do in M-PESA system. When creating users, you assign roles depending on the nature of work you want the operator to perform in the system.

There are 4 main types of roles in the system and additional 2 roles as explained below:



Business Administrator:

- The user limited to creating and managing other users.
- Not able to view transactions.
- User created by Safaricom.

Business Web Operator:

- The user can View statements.
- The user will upload the bulk file/ initiate transactions.
- The user CANNOT Approve/reject other transactions.
- The user CANNOT withdraw funds from M-PESA.

Business Manager:

- The user can View statements.
- The user approves the bulk transaction uploaded.
- The user can Approve/reject other transactions.
- The user can withdraw funds from M-PESA.

Business Auditor:

- The user has view/read only access.

NB: Only Manager and **Operator role** are able to set up money movement between accounts and view as well as **download statements** from the M-PESA Web system.

5. ACCOUNT TYPES IN A B2C ORGANIZATION

An M-PESA B2C organization has two accounts:

5.1 MMF/M-PESA/WORKING ACCOUNT

The M-PESA Account is where all deposits to the M-PESA Bank account are paid in and where all withdrawals from the M-PESA bank account must be requested. This account does not have direct contact with the customer account.

The M-PESA account statement will have a record of all the deposits made to the M-PESA holding account (CBA deposits) and also shows a record of all withdrawals made to the business bank account.



5.2 UTILITY ACCOUNT

In order to make payments to customers, the funds must be available in the utility account. The utility account is directly linked to the customer M-PESA account.

On the utility account statement, we get a record of all the payments sent out to customers and the cost of every transaction.

6. DEPOSITING FUNDS TO YOUR M-PESA B2C ACCOUNT

To make a deposit to your B2C account, you shall be required to make either a cash, cheque or EFT transfer to the M-PESA holding company bank account at either CBA or KCB. The account details are as below;

The beneficiary (M-PESA Holding Company Limited) bank account details at KCB or CBA shall be a combination of a prefix **333** and your **M-PESA Head Office Short Code/Business number**. **Example: If your organization M-PESA Head Office Short Code/Business number is 123456, the Beneficiary account number details shall be 333123456 as below;**

Account Name	MPESA Holding Co. Limited
Bank Name	Kenya Commercial Bank
Branch Name	Moi Avenue
Account Currency	KES
Swift	KCBLKENX
Account Number	333123456
Details of Payment	123456 - XYZ LIMITED

Note:

The new process affects:

1. Organizations doing EFTs & RTGS from other banks to KCB or CBA
2. The new account number is a nine-digit number (333+6-digit organization code).

In-case of any inquiries, kindly get in touch with us on M-PESAfinance@safaricom.co.ke or 0722004980

6.1 LOGGING IN TO M-PESA

Log in to M-PESA System as the Business web Operator or Business Manager as created by the Business Administrator.

- Enter your **User Name** as was provided by the business administrator
- Enter your **Password** as was provided by the business administrator
- Enter your organization **Short Code**
- Click on **Login**



M-PESA
Organization Portal

Language: English

Short Code: 339911

User Name: jkmaina1

Password: •••••• [Forgot password?](#)

Verification Code: 9165

9 1 6 5

Login

Safaricom | M-PESA

- You will be prompted to change your password
- Set a security question and answer.
- Click submit

Note: You are required to enter a strong password i.e. password must contain at least one alphabet, one upper case and one numeric character e.g. **Password01**



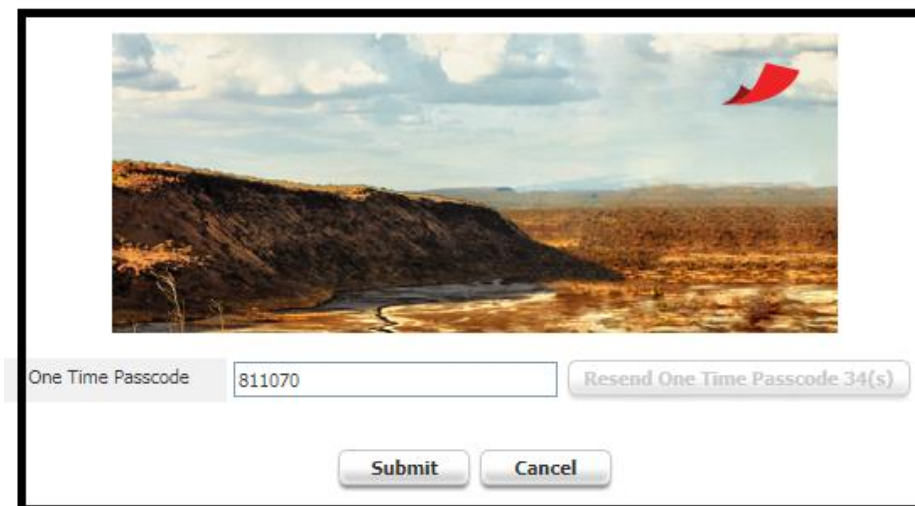
This is your first login. Please change your initial password immediately and configure your security questions.

Old password	<input type="text"/>
New password	<input type="text"/>
Confirm password	<input type="text"/>
Question 1	<input type="text"/> ▼
Answer 1	<input type="text"/>

Submit Cancel



- Enter a One Time Password received via sms on the notification number put during creation. The OTP times out after 60 seconds.



One Time Passcode Resend One Time Passcode 34(s)

Submit Cancel

6.2 FUNDS TRANSFER

Transfer of funds from MMF account to Utility account

Why perform this action?

To avail funds in the utility account in order to pay out to the organization's client base.

What to expect?

- Log in to M-PESA As the Business Web Operator.
- Go to **My Functions > Initiate Transaction**
- Select **Transaction Services** as **Business Services - Move Funds from MMF Account to Utility Account**
- The **Primary Identifier Short Code** will automatically be selected
- The **Receiver Identifier Short Code** will automatically be selected



- The **Account** will automatically be selected
- Enter **Amount**(Minimum is Kshs. 35,000)
- Enter the **Reason**
- Select **Submit**

The screenshot shows the M-PESA 'Initiate Transaction' form. The form is titled 'Initiate Transaction' and includes the following sections:

- Basic Info:** Transaction Services (Business Services – Move Funds from MMF Account to Utility Account), Services Description (Business Services – Move Funds from MMF Account to Utility Account).
- Details:** Primary Identifier (Short Code: 473264), Receiver Identifier (Identifier Type: Short Code, Short Code: 473264, Account: automatically selected by system).
- Amount:** Amount(KSH): 35,000.00.
- Remark&Reason:** Remark, Initiate Scenario (Initiate transaction on Organization Portal), Reason (Input Manually ...), Approved.
- Comment to Customer:** Comment to Customer.

At the bottom of the form, there are 'Submit' and 'Reset' buttons. A red arrow points to the 'Submit' button.

The **Transaction Budget** pop up window will appear. Select **Continue**.

A **Business Manager** will now find this transaction in their pending list, and will be able to confirm it, finalizing the funds transfer.

The screenshot displays the M-PESA Organization Portal interface. The top navigation bar includes 'My Tasks', 'Account View', 'Search', 'My Functions', and 'Browse Organization'. The user is logged in as 'jmaina2' with 'My Preference' settings. The main heading is 'Initiate Transaction' for organization '339911 - Travellers Enterprise(Active)'. Below this, there is a 'Summary of Accounts' section and a 'Basic Info' section with a dropdown menu set to 'Business Services - Move Funds from MMF Account'. The 'Details' section includes 'Primary Identifier' with a 'Short Code' of '339911'. A 'Receiver Identifier' section is partially visible. A 'Transaction Budget' pop-up window is overlaid on the form, containing the text: 'You are going to initiate a service for an identity 339911 - Travellers Enterprise. The account and charge information for this transaction is as follows. No charge.' The pop-up has 'Continue' and 'Cancel' buttons. The 'Remark&Reason' section at the bottom has a 'Remark' field with the value 'Approved'.

The screenshot shows the M-PESA Organization Portal interface. At the top, there are navigation tabs: Home, Initiate Transaction, My Tasks, Account View, Search, My Functions, and Browse Organization. The main content area displays a message: "The transaction has been processed, and need be approved by another operator." Below this message, it says "You can: Continue to initiate transaction >>".

Below the message is a "Transaction Details" section with the following information:

Receipt No.	1LU803QAO	Status	Pending Authorized
Initiation Time	30/12/2014 11:34:53	Last Update Time	
Transaction Type	Organization Internal Transfer	Reason Type	Business Transfer From MMF Account To Utility Account via WEB
Initiator	Travellers Enterprise\jmaina2	Initiator Type	Organization Operator
Channel	WEB	Amount(KSH)	250,000.00
Remark	Approved		
Note			
Failure Description			

The status of the transaction will be **Pending Authorized**

You can view the transaction by:

- Select **Browse Organization**
- Select **Review Transaction**
- Select **Account Type** as **Working Account**



- Select **All Transaction**
- Select the status as **Pending**, then click on **Search**

The pending authorized transaction will appear as below.

- Overview
- Organization Info
- Tills
- Task List
- Audit Log
- Organization Transaction**
- Initiate Transaction
- Review Transaction**
- Initiate Reversal

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\500000000110331732

Account No.	Account Type	Alias	Account Relati...	Current Balance	Available Balan...	Reserved Bala...	Unclear Balance	Status
500000000110331732	MMF Account for ...	Working Account	Owned	KSH 1,061,621.00	KSH 1,025,381.00	KSH 36,240.00	KSH 57,000.00	Active

Account No.	Initiation Time	Transaction Amount
No records found.		

Total records: 0 10 records 0 / 0 Go

Completed Transaction: **All Transaction**

Status: All Declined Canceled Expired Pending Completed

Initiation Time: 19/01/2015 00:00:00 ~ 25/01/2015 23:59:59

Export

Receipt ...	Initiation Time	Details	Transaction Status	Withdrawn	Paid In	Operation
2AP6064ZQ	25/01/2015 17:45:32	Business Transfer from MMF Account to Utility Account via WE...	Pending Authorized	KSH -36,000.00		No operation can be per...



- Select **Approve**
- Enter **Comments**
- Select **Submit**
- Select **Confirm**

Can't see the Finalize/Confirm Button?

You will only see the “Finalize Transaction” button if you have permission to finalize the transaction.

Even if you normally have permission to finalize a transaction, you may not have permission on this transaction. For example, you are not able to finalize transactions which you created.

7. PREPARING AND UPLOADING XML FILES FOR BULK

VALIDATION AND PAYMENT

7.1 Name Validation Feature

This procedure is a guide on how to validate the M-PESA registered names of the recipient one intends to send the funds to before sending the funds.

NOTE: The procedure for validation on G2 is separate; you have to do a separate validation procedure from the payments procedure.

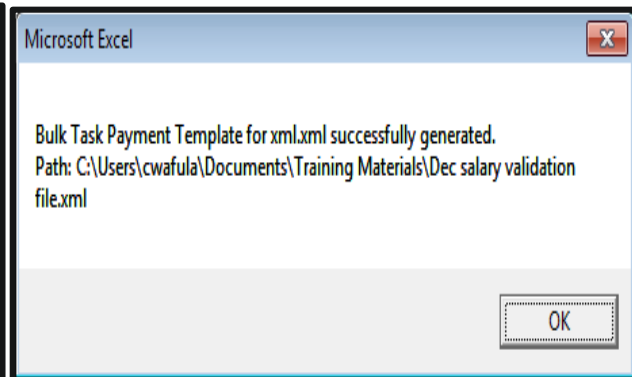
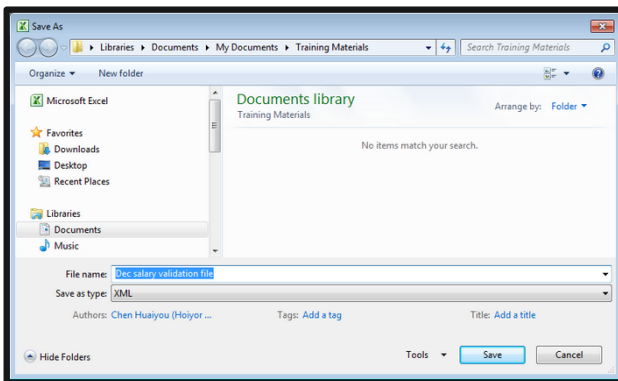
Open the Bulk Task Payment Template for xml file.

- ❖ Under the **Credit Identity String Type**, select MSISDN
- ❖ Under **Credit Identity String**, key in the MSISDN starting with **2547XXXXXX**
- ❖ Under validation Identity String type, Leave it blank
- ❖ Under **Validation Identity String**, Leave it blank
- ❖ Under **Amount**, enter the amounts to be sent
- ❖ Under **Comment** field, its optional, input any comment.



❖ Then click on the **Generate Bulk Payment Validation**

Generate Bulk Payment Validation		Generate Bulk Payment			
Credit Identity String Type	Credit Identity String	Validation Identity String Type	Validation Identity String	Amount	Comment
MSISDN	254722004848			17000	Salary Advance



Log into M-PESA System as the **Business Web Operator**.

Language:

Short Code:

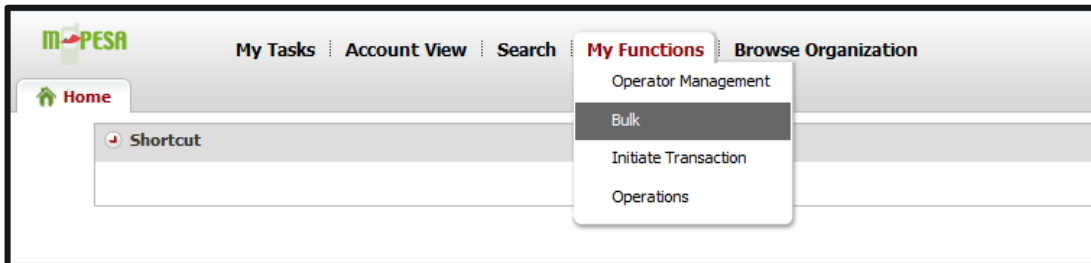
User Name:

Password: [Forgot password?](#)

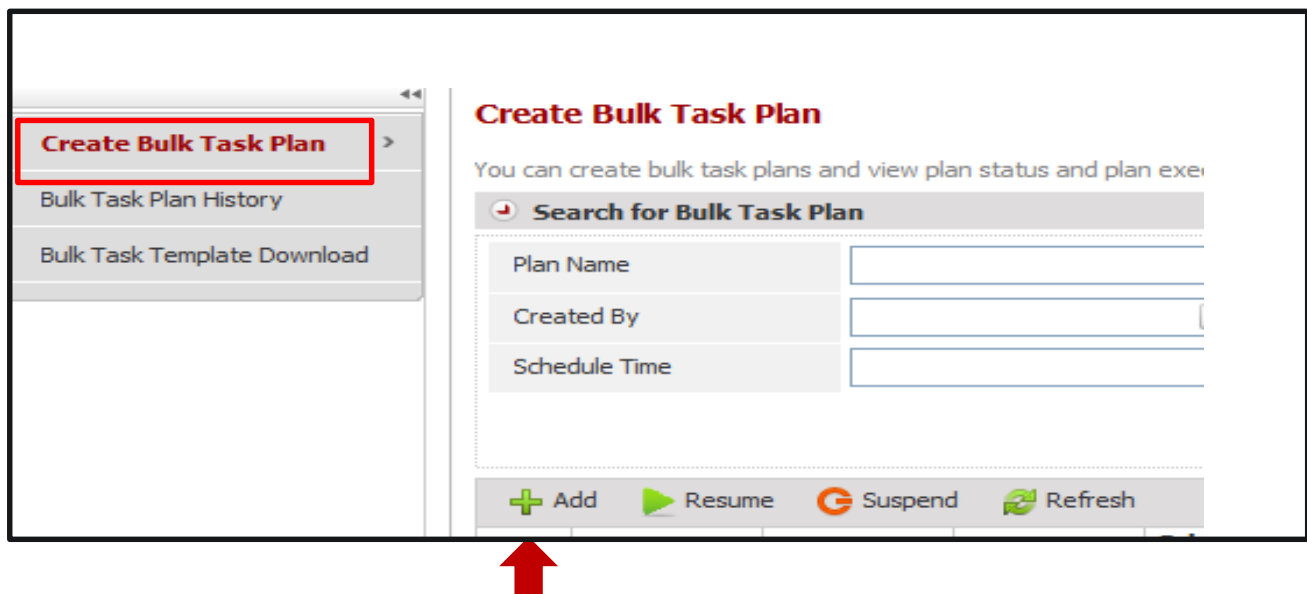
Verification Code:



Go to **My Functions** and select **Bulk**



1. Click on **Add** and select **XML Bulk Task**



2. Select **Bulk Type**> **Bulk Payment Validation**
3. **The File Payment Type** will automatically be selected as **XML**
4. Name your bulk Plan, e.g **Dec Salary Validation file**
5. Click on **Browse** and go select the xml file you had generated.
6. Click on on the **upload** button
7. Select the **Organization name**, in this case its your organization



8. Select the **time** schedule for example **Next available Slot**
9. Click on **submit**
10. Select **Yes**

M-PESA My Tasks Transaction Account View Search My Functions Browse Organization M-PESA Organization Portal Web Operator My P

Home Bulk

Create Bulk Task Plan

Bulk Task Plan History

Bulk Task Template Download

Add Bulk Task Plan

You can add a bulk task plan using a file format and configure basic information and time schedule for the bulk task plan.

Basic Info

Bulk Type: Bulk Payment Validation

File Template Type: XML

Plan Name: validation

File: C:\fakepath\validation.xml

Total Items:3 Total Uploaded Items:2 Error Items:1

Description:

Organization Short Code: 473264

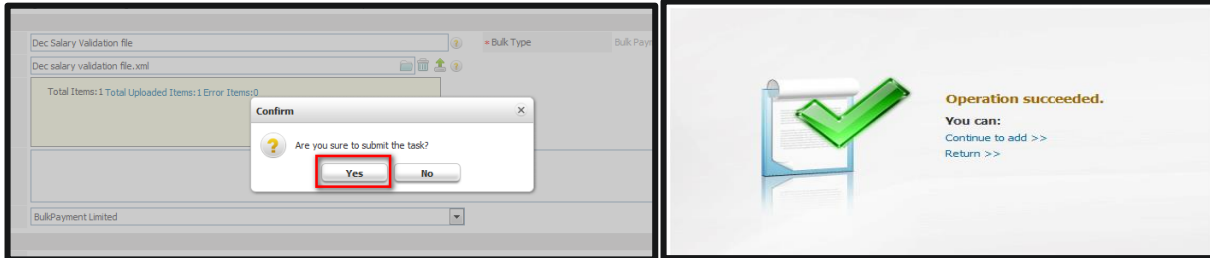
Time Schedule

Schedule Time: Customized Next Available Time Slot

Submit Cancel

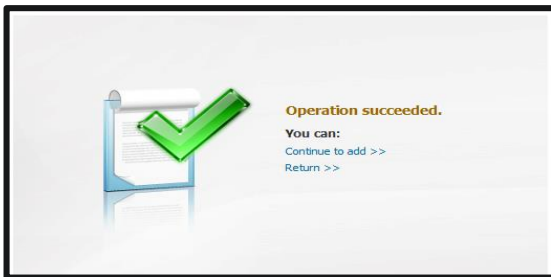
Then select as shown below:

1. Select Bulk Type
2. Type Plan name
3. Select Upload
4. Select Organization short code
5. Select Schedule time



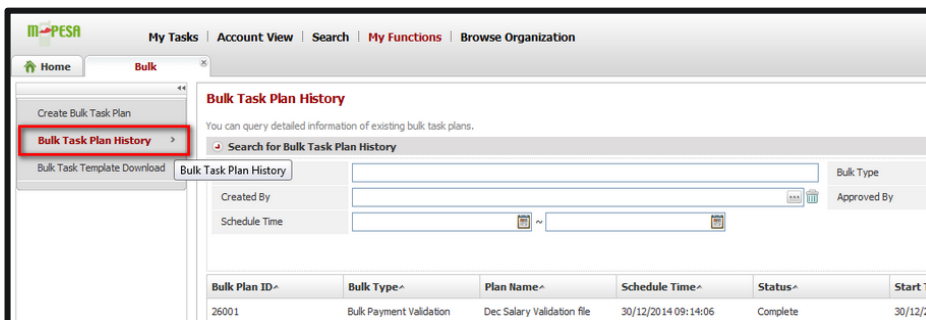
Click on **Yes** to submit

You get the prompt below.



The operation succeeds.

To View the details of the task plan, go to **Bulk Task Plan History**



Click on the operation tab as below of the bulk task plan transaction.



Bulk Plan ID	Bulk Type	Plan Name	Schedule Time	Status	Start Time	End Time	Success Rate	Operation
26001	Bulk Payment Validation	Dec Salary Validation File	30/12/2014 09:14:06	Complete	30/12/2014 09:14:06	30/12/2014 09:14:08	1/1(100.00)	
25003	Bulk Payment	ki/ina pesa	23/12/2014 17:13:09	Complete	23/12/2014 17:13:09	23/12/2014 17:13:11	1/1(100.00)	

Under the **Basic Info** section, go to the **Report** part on the right highlighted below and select CSV format.

View Bulk Task Plan

Basic Info

Plan Name	Dec Salary Validation file	Bulk Plan ID	26001
Bulk Type	Bulk Payment Validation	Status	Complete
Created By	Operator	Approved By	
Data File	Dec salary validation file.xml	Creation Time	30/12/2014 09:14:06
Schedule Time	30/12/2014 09:14:06	Report	

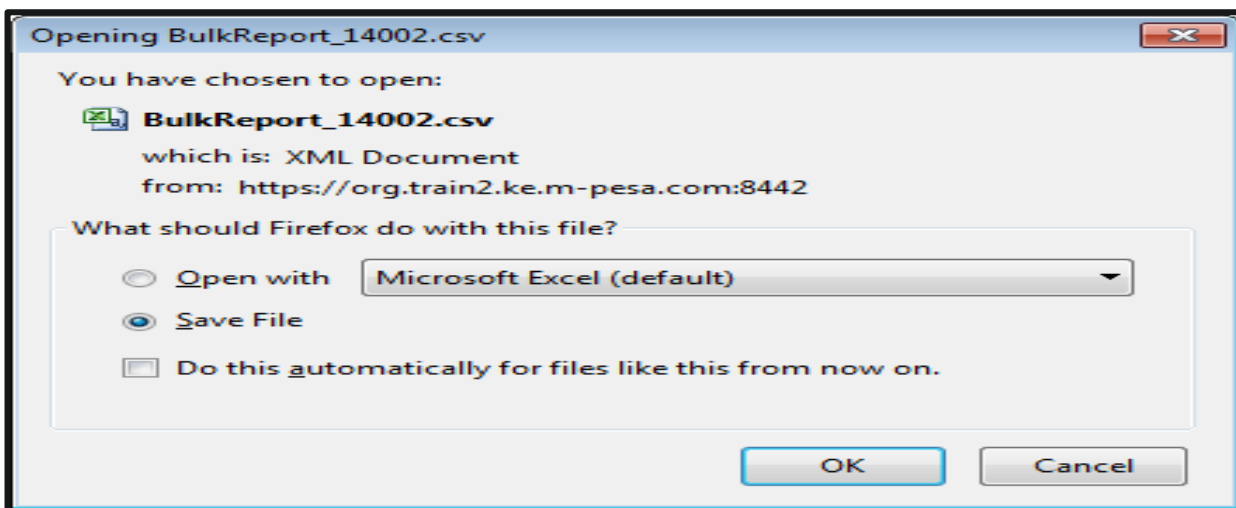
Item Check Result

Total Uploaded Items	1	Passed Initial Validation Items	1
Failed Initial Validation Items	0		

Execution Info

Start Time	30/12/2014 09:14:06	End Time	30/12/2014 09:14:08										
Progress	<table border="1"> <thead> <tr> <th>Success Items</th> <th>Failed Items</th> <th>Processing Items</th> <th>Waiting Items</th> <th>Details</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>0</td> <td>0</td> <td>0</td> <td>100.00% 1/1</td> </tr> </tbody> </table>	Success Items	Failed Items	Processing Items	Waiting Items	Details	1	0	0	0	100.00% 1/1		
Success Items	Failed Items	Processing Items	Waiting Items	Details									
1	0	0	0	100.00% 1/1									

Return



The downloaded file will be as below, **Column J** gives the M-PESA registered names of the customers as below



A	B	C	D	E	F	G	H	I	J	K	L	M	N
Bulk Plan	Bulk Type												
26001	Bulk Payment Validation												
Organizati	Bulk Plan Name	Bulk Plan Description											
BulkPaym	Dec Salary Validation file												
Initiation	Approval Time	Schedule Time	Completed/Cancelled Time	Duration	Total Recc	Valid Records	Invalid Records	Successful Records	Failed Records	Bulk Plan	Bulk Plan Error Message		
30/12/2014	09:14	30/12/2014 09:14	30/12/2014 09:14	1(s)	1	1	0	1	0				
Initiating	Approving Operator	Cancelling Operator											
Operator	Operator												
Record Nc	Amount	Credit Identity String Type	Credit Identity String	Validator	Validator Comment	Validation Result	Customer Type	Customer Name					
1	17000	MSISDN	254722004848	Salary Advance	Success	Registered	Joan Kean						

7.2 Bulk Payment

Bulk payment is done via the M-PESA system. The organization is given a **Bulk Task Payment Template for XML** to facilitate data upload to the M-PESA system. This should be saved on the user's computer to be used.

You shall receive the following;

- The **Bulk Task Payment Template for XML**. Kindly save this file anywhere in a folder in your computer.
- This process requires Microsoft Excel version 2003 or higher version installed.

Input the details into the Bulk excel provided

Step 1

Open the **Bulk Task Payment Template for XML** and fill in the details as below:

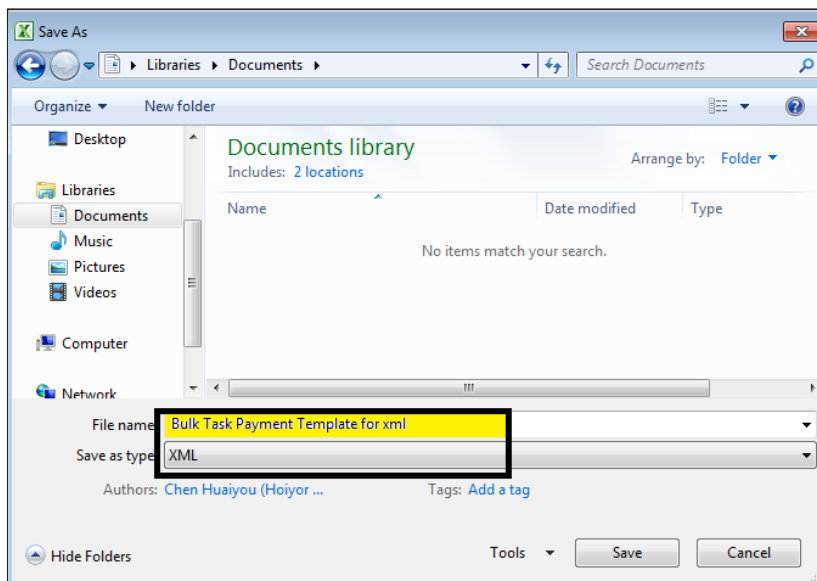
- Click Generate Bulk Payment to autogenerare an XML file and then save.



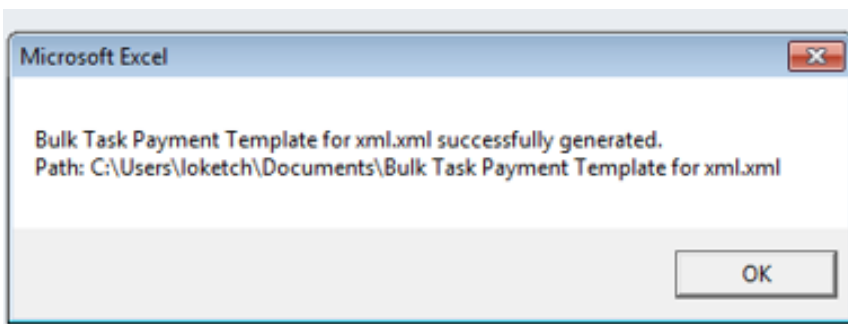
	A	B	C	D	E	F
1	Generate Bulk Payment Validation		Generate Bulk Payment			
2	Credit Identity String Type	Credit Identity String	Validation Identity String Type	Validation Identity String	Amount	Comment
3	MSISDN	254722004848			17000	Salary Advance
4						
5						
6						
7						
8						
9						
10						

Step 2

- File will be successfully saved once you select the correct template that you saved as an XML.



A below pop-up appears. Click OK to save it.





Step 3

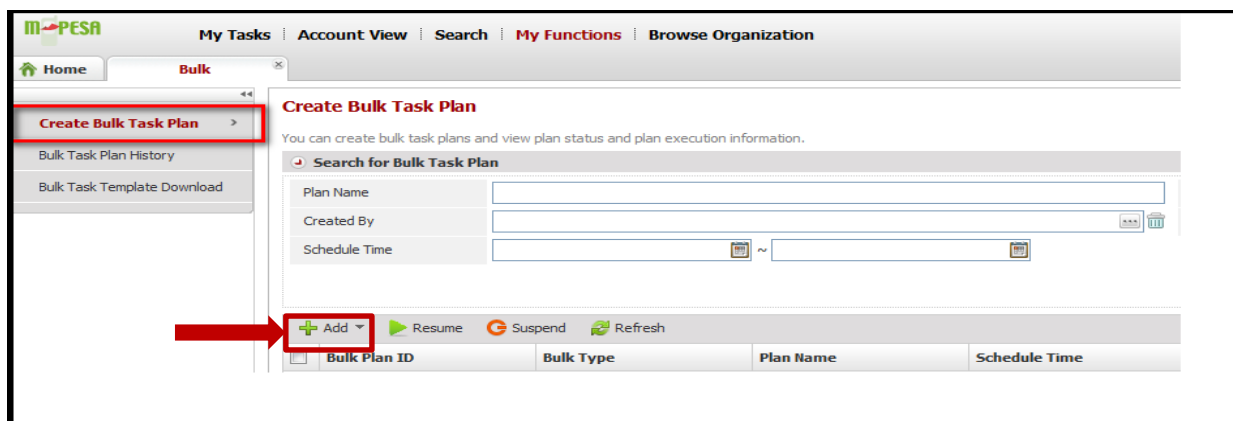
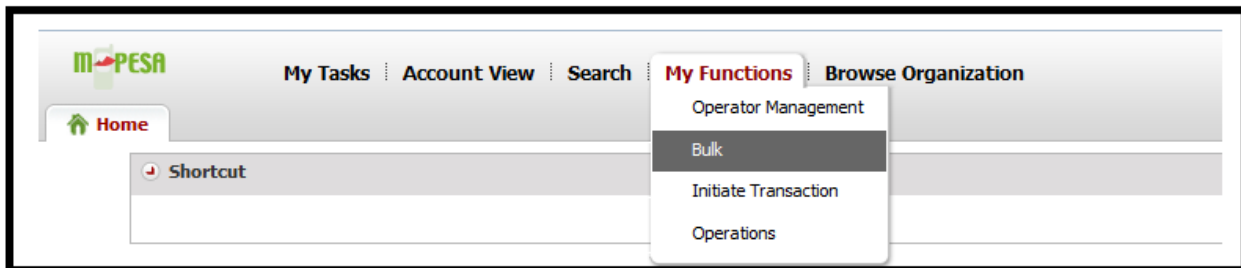
8. GENERATING XML FILES FOR UPLOAD

8.1 Setting up a Payment Schedule

Why perform this action?

This is done in order to pay the organization's client base through M-PESA. Save the template on your computer and initiate the process of uploading the template.

Once you have logged in to the M-PESA system, **Select My Functions** and then **Bulk** as shown below:





Click on Add then

1. Select **Bulk Type >Bulk Payment**, **File Template Type** will automatically select **XML**
2. Name the **Plan Name** to enable the uploading of the payment file
3. Under the section for file, click on the browse button and search for the file that you had saved for the payment plan.
4. Click on the upload button
5. Select your organization name and the service type
6. Under **Schedule Time**, set the date and time when you want payments to go out.
7. Then click **Submit** for payment to be effected.

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

Home | Initiate Transaction | **Bulk**

Create Bulk Task Plan

Bulk Task Plan History

Bulk Task Template Download

Add Bulk Task Plan

You can add a bulk task plan using a file format and configure basic information and time schedule for the bulk task plan.

Basic Info

Bulk Type: Bulk Payment

File Template Type: XML

Plan Name: Test

File: C:\fakepath\dividend.xml

Total Items:2 Total Uploaded Items:2 Error Items:0

Description:

Organization Name: R4 TEST B2C

Service: Business Payment To Customer

Comment to Customer:

Time Schedule

Schedule Time: Customized Next Available Time Slot

Submit Cancel

Note: Under Schedule Time, if one selects the option for Customized time scheduling then you should be able to choose/dictate a time slot when you wish to have the payment to be done. This is displayed as below.



Add Bulk Task Plan

You can add a bulk task plan and configure basic information and time schedule for the bulk task plan.

Basic Info

Plan Name: G 2 A

File: C:\fakepath\Bulk Payment 08092014 A.csv

Total Items:4 Total Uploaded Items:4 Error Items:0

Description: Customer Payment

Organization Name: 12345

Service: Business Payment To Customer

Time Schedule

Schedule Time: Customized (Selected) / Next Available Time Slot

Date: 08/09/2014

Hour Segment	Rate	Hour Segment	Rate
15:00-16:00	%0.00	16:00-17:00	%0.00
17:00-18:00	%0.00	18:00-19:00	%0.00
19:00-20:00	%0.00	20:00-21:00	%0.00
21:00-22:00	%0.00	22:00-23:00	%0.00
23:00-24:00	%0.00		

Submit Cancel

- i. Business Payment to Customer (Restricted to payment of registered customers)
- ii. Business Payment to Customer with withdrawal charge paid (Restricted to payment of registered customers)
- iii. Salary Payments (open for every mobile user)
- iv. Salary Payment with withdrawal charge paid (Restricted to payment of registered customers)
- v. Promotion Payment (Notification comes with a congratulation message that the mobile user has won)

Confirm

Are you sure to submit the task?

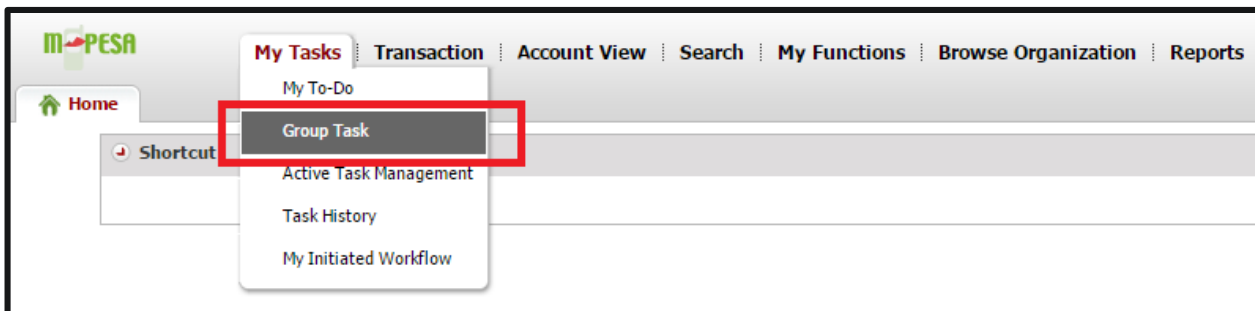
Yes No

Once you submit the payment then you should have the following response.

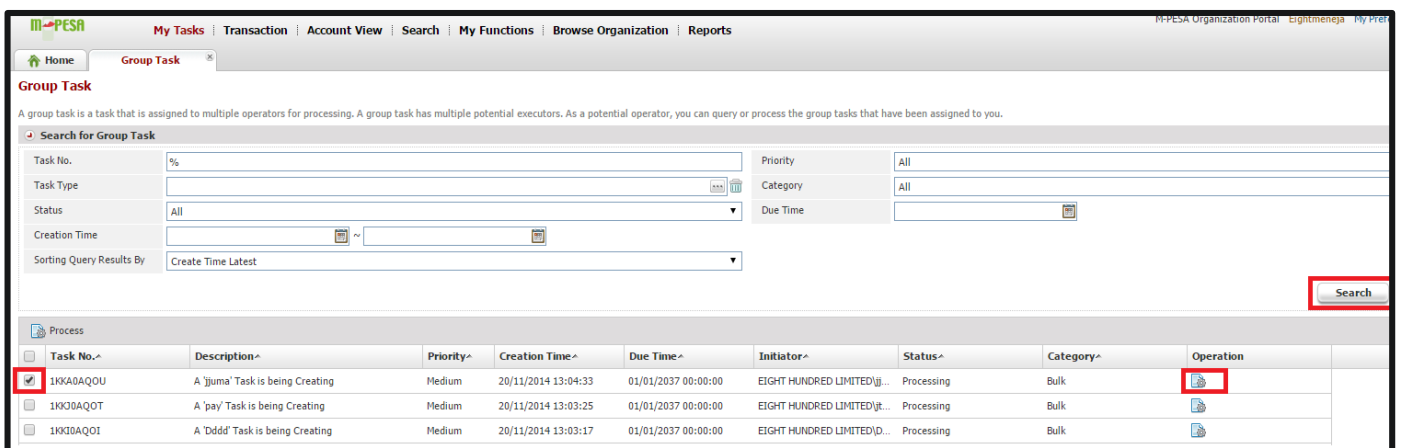


8.2 Approval Process

Go to My Tasks > Group Tasks > Search



It will populate a list of the tasks waiting for approval. Select the **Operation** Icon against the one you want to approve,



The 'Approve Manage Bulk Task Plan' page will appear. The Bulk Plan ID is still visible as shown below. Select **Approve** > enter the **Comments** > select **Submit**.

m-PESA My Tasks | Transaction | Account View | Search | My Functions | Browse Organization | Reports

Home | Group Task | Approve 'Manage Bulk Task Plan'

Approve 'Manage Bulk Task Plan'

Basic Info

Creation Time	20/11/2014 13:04:33	Due Time	01/01/2037 00:00:00
Initiator	EIGHT HUNDRED LIMITED\jjuma	Task Status	Processing
Order Status	Pending	Workflow ID	1KKA034X0
Order Channel	Web	Event Source	Bulk Operation
Order Start Time	20/11/2014 13:04:33		

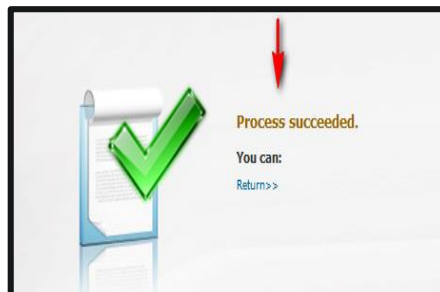
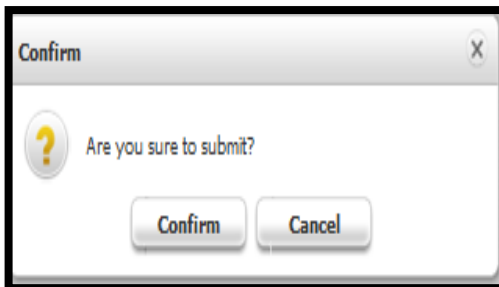
Task Specific Info

Bulk Plan ID	23171	Bulk Type	Bulk Payment
Status	Wait Active	Plan Name	jjuma
Creation Time	20/11/2014 13:04:33	Created By	jjuma
Data File	Juma Task Payment Template for xml.xml	Schedule Time	Next Available Time Slot
Valid Records	1	Total Uploaded Items	1
Description	ok	Failed Initial Validation Items	0

Task Processing

Action: Approve Reject

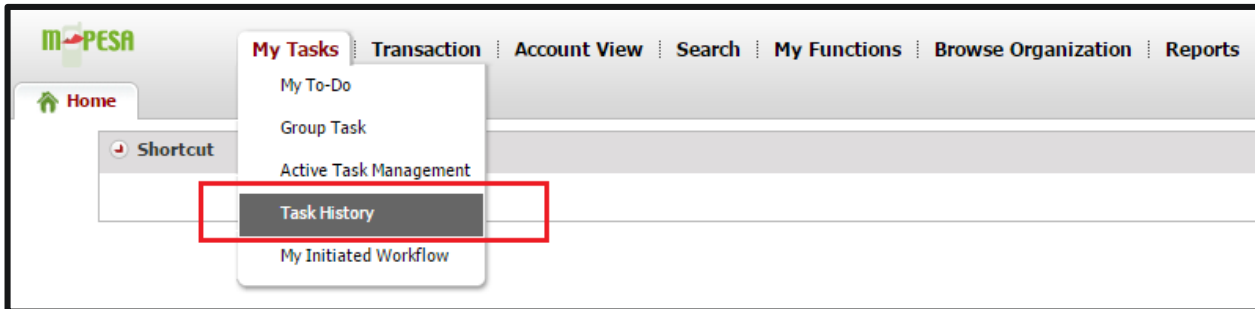
Comments: Bulk Payment Approved



The task has been approved successfully

To see the approved bulk task plan, the user with the manager role will:

- ✓ Select My Tasks
- ✓ Select Task History



Select Search

It will populate a list of the tasks for the manager role. Select the **Operation** icon against the one you would like to approve.

Task History

You can query historical records of canceled, completed, expired and rejected tasks.

Search for History Task

Task No. % Priority All

Task Type Category All

Owner Status All

Creation Time ~

Completion Time ~

Sorting Query Results By Create Time Latest

Task No.->	Description->	Priority->	Creation Time->	Completion Time->	Initiator->	Status->	Process Result->	Owner->	Category->	Operat
1KR10BNZ4	A 'Jojo' Task is being Creating	Medium	27/11/2014 12:22:40	27/11/2014 12:27:05	EIGHT HUNDRED LIM...	Completed	Approve	EIGHT HUNDRED LIM...	Bulk	
1KX80AQPS	A 'HhhhHf' Task is being Creating	Medium	20/11/2014 13:04:39	20/11/2014 14:17:27	EIGHT HUNDRED LIM...	Completed	Approve	EIGHT HUNDRED LIM...	Bulk	
1KKA0AQQU	A 'Jjuma' Task is being Creating	Medium	20/11/2014 13:04:33	30/12/2014 10:44:29	EIGHT HUNDRED LIM...	Completed	Approve	EIGHT HUNDRED LIM...	Bulk	

The task history for the bulk plan ID will look as below.



m-PESA My Tasks | Transaction | Account View | Search | My Functions | Browse Organization | Reports

Home Task History Approve 'Manage Bulk Task Plan'

Task History - Approve 'Manage Bulk Task Plan'

Basic Info

Creation Time	20/11/2014 13:04:33	Completion Time	30/12/2014 10:44:29
Initiator	EIGHT HUNDRED LIMITED/jjuma	Owner	EIGHT HUNDRED LIMITED(Eightmeneja)
Task Status	Completed	Order Status	Completed
Workflow ID	1KKA034X0	Order Channel	Web
Event Source	Bulk Operation	Order Start Time	20/11/2014 13:04:33

Task Specific Info

Bulk Plan ID	23171	Bulk Type	Bulk Payment
Status	Complete	Plan Name	jjuma
Creation Time	20/11/2014 13:04:33	Created By	jjuma
Data File	Juma Task Payment Template for xml.xml	Schedule Time	Next Available Time Slot
Valid Records	1	Total Uploaded Items	1
Description	ok	Failed Initial Validation Items	0

Execution Info

Start Time	30/12/2014 10:44:29	End Time	30/12/2014 10:44:31										
Progress	<table border="1"> <thead> <tr> <th>Success Items</th> <th>Failed Items</th> <th>Processing Items</th> <th>Waiting Items</th> <th>Details</th> </tr> </thead> <tbody> <tr> <td>0 </td> <td>1 </td> <td>0</td> <td>0</td> <td><div style="width: 100%; height: 10px; background-color: green; text-align: center;">% 100.00</div></td> </tr> </tbody> </table>	Success Items	Failed Items	Processing Items	Waiting Items	Details	0	1	0	0	<div style="width: 100%; height: 10px; background-color: green; text-align: center;">% 100.00</div>		
Success Items	Failed Items	Processing Items	Waiting Items	Details									
0	1	0	0	<div style="width: 100%; height: 10px; background-color: green; text-align: center;">% 100.00</div>									

Task History Comment

Create ID	Task Name	Task No.	Action	Comments
jjuma	Approve 'Manage Bulk Task Plan'			

[Return](#)

9. WITHDRAWING FUNDS FROM M-PESA

Why perform this Action?

An organization will want to withdraw funds if they have an excess of M-PESA funds.

At the end of this action, the organization's business manager will initiate a withdrawal to their nominated bank account which will be confirmed by the M-PESA Finance team.

With the introduction of **Real Time Settlement (RTS)**, a service that allows to receive funds instantly in their nominated bank accounts.

Note: Businesses whose banks are on the RTS service are the only ones who will receive funds immediately in their nominated bank accounts.

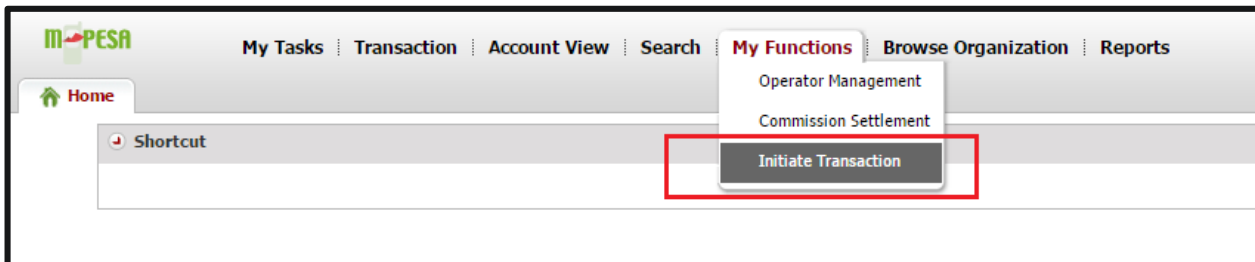
The minimum amount to withdraw for those on **RTS** is **Kshs. 10**

The minimum amount for those **not on RTS** is **Kshs. 5, 000**



Scenario 1:
Withdrawals for those not on RTS

- ✓ Select My Functions
- ✓ Select Initiate Transaction



The Initiate Transaction page will open as below:

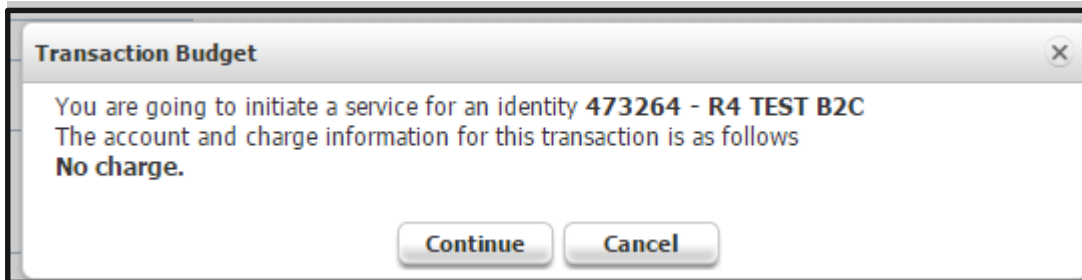
The screenshot shows the 'Initiate Transaction' page in the M-PESA Organization Portal. The page is titled 'Initiate Transaction' and contains the following sections:

- Summary of Accounts**
- Basic Info**
 - Transaction Services: Organization Withdrawal From M-PESA (indicated by a red arrow)
 - Services Description: Organization Withdrawal From M-PESA
- Details**
 - Primary Identifier**
 - Short Code: 473264 (with a 'Verify' button)
 - Receiver Identifier**
 - Identifier Type: SP
 - Amount**
 - Amount(KSH): 35,000.00
 - Remark&Reason**
 - Remark: (Empty text area)
 - Initiate Scenario: Initiate transaction on Organization Portal
 - Reason: (Input Manually ...) Approved
 - Comment to Customer: (Empty text area)

At the bottom of the page, there are 'Submit' and 'Reset' buttons. A red arrow points to the 'Submit' button.



- ✓ Go to Basic Info
- ✓ Under the Transaction Services drop down button, select Organization Withdrawal from M-PESA
- ✓ The Primary Identifier Short Code picks your organization automatically.
- ✓ The Receiver Identifier type should be selected as SP
- ✓ Enter the Amount, Remark & Reason and click on Submit.



The page below will populate showing the details of the transaction details.

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

Home **Initiate Transaction**

The transaction has been processed.
You can:
[Continue to initiate transaction >>](#)

Transaction Details

Receipt No.	111003/Q46	Status	Completed
Initiation Time	30/12/2014 11:12:25	Last Update Time	30/12/2014 11:12:25
Transaction Type	Business Withdrawal	Reason Type	Organization Withdrawal of Funds
Initiator	EIGHT HUNDRED LIMITED/Eightmemeja	Initiator Type	Organization Operator
Channel	WEB	Amount(KSH)	36,000.00
Remark	Withdrawal approved		
Note			
Failure Description			

Account Entries

Identity	Account	Reason Type	Details	Transaction Amount	Available Balance	Running Balance
Organization	800000 - EIGHT HUNDRED LIMITED	MW Organization Account/500000...	Organization Withdrawal of Funds	Organization Withdrawal of Funds ...	KSH -36,000.00	KSH 2,803,963.00

Audit Log

Event	Initiator Type	Initiator	Time	Reason
Initiate Transaction	Organization Operator	EIGHT HUNDRED LIMITED/Eightmemeja	30/12/2014 11:12:25	Cash Flow



To view the transaction, the operator with the manager role will:

- ✓ Select **Browse Organization**
- ✓ Select **Review Transaction**
- ✓ Select the **Account Type** as **Working Account**
- ✓ Select the **Completed Transaction** tab and click on **Search**

Review Transaction 800800 - EIGHT HUNDRED LIMITED(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: MMF Organization Account!50000000110251013

Account No.	Account Type	Alias	Account Relationship	Current Balance	Available Balance	Reserved Balance	Unclear Balance	Status
500000000110251013	MMF Account for Organization	Working Account	Owned	KSH 2,803,963.00	KSH 2,803,963.00	KSH 0.00	KSH 0.00	Active

Initiation Time

Transaction Amount

Total records: 0

Completed Transaction

Completion Time: 24/12/2014 00:00:00 ~ 30/12/2014 23:59:59

Search Reset

Receipt No.	Completion Time	Details	Transaction Status	Withdrawn	Paid In	Balance	Operation
11U003Q46	30/12/2014 11:12:25	Organization Withdrawal of Funds by EIGHT HUNDRED LIMITED/Eightmejea	Completed	KSH -36,000.00		KSH 2,803,963.00	No operation can be performed.

Total records: 1

Scenario 2:

Withdrawals for banks on RTS

- ✓ Select **My Functions**
- ✓ Select **Initiate Transaction**

My Functions

- Operator Management
- Commission Settlement
- Initiate Transaction**

- ✓ Select **Organization Withdrawal from MPESA-Real Time**
- ✓ Under Primary Identifier, the **Organization short code and bank details** appear.
- ✓ The Primary Identifier Short Code picks your organization automatically.



- ✓ The Receiver Identifier type should be selected as SP
- ✓ Enter the Amount, Remark & Reason and click on Submit.

Initiate Transaction

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

Summary of Accounts

Basic Info

Transaction Services: Organization Withdrawal From MPESA-Real Time

Services Description: Organization Withdrawal From MPESA-Real Time

Details

Primary Identifier

Short Code: 186186

Bank Name: ECOBANK KENYA LTD

Bank Account Name: B2C2015TEST

Bank Branch: KISII

Bank Account Number: 186186

Amount

Amount(KSH): 10.00

Remark&Reason

Remark: [Empty field]

Initiate Scenario: Initiate transaction on behalf of organization

Reason: (Input Manually ...)
Approved

Comment to Customer: [Empty field]

Submit Reset

Bank details

10. OPERATOR MANAGEMENT

What to expect?

At the end of this action, the second organization operator will have been unlocked and be able to log into the system. To unlock an operator, the following steps will be used.



10.1 UNLOCKING A WEB OPERATOR

Your M-PESA Account will lock if you input the wrong password more than three attempts.

Why perform this Action?

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

A user whose account is locked cannot access the M-PESA website until their account is unlocked by the Business Administrator.

Start Here

Log in to the M-PESA system as the Business Administrator.

A screenshot of the M-PESA Organization Portal login page. The page features the M-PESA logo at the top center, with "Organization Portal" written below it. A banner image shows a landscape with a red flag flying. The login form includes fields for Language (English), Short Code (800800), User Name (EightAdmin), Password (masked with dots), and Verification Code (6030). A "Forgot password?" link is next to the password field. A "Login" button is at the bottom. The Safaricom and M-PESA logos are in the bottom right corner.

Language: English

Short Code: 800800

User Name: EightAdmin

Password: [Forgot password?](#)

Verification Code: 6030

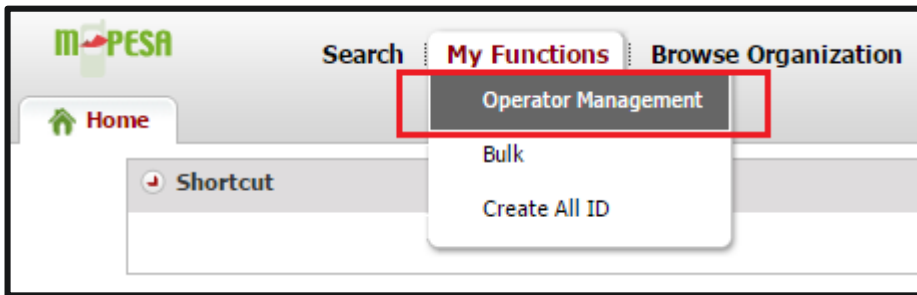
[6030](#)

[Safaricom](#) | [M-PESA](#)

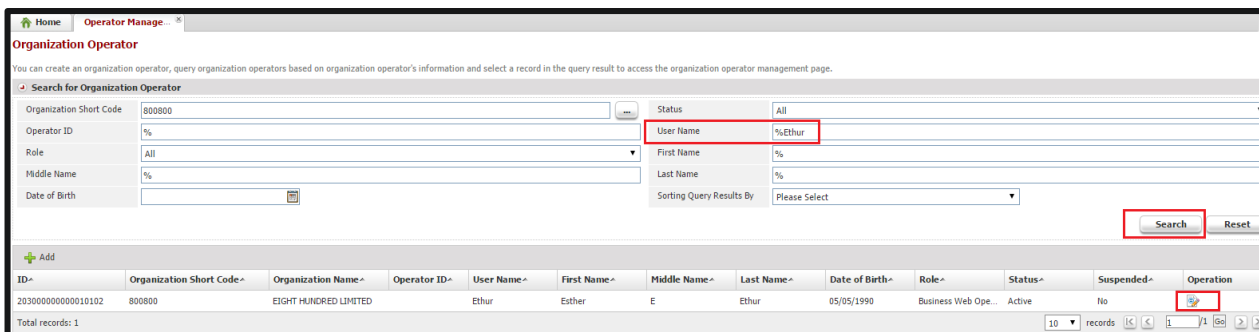
Login



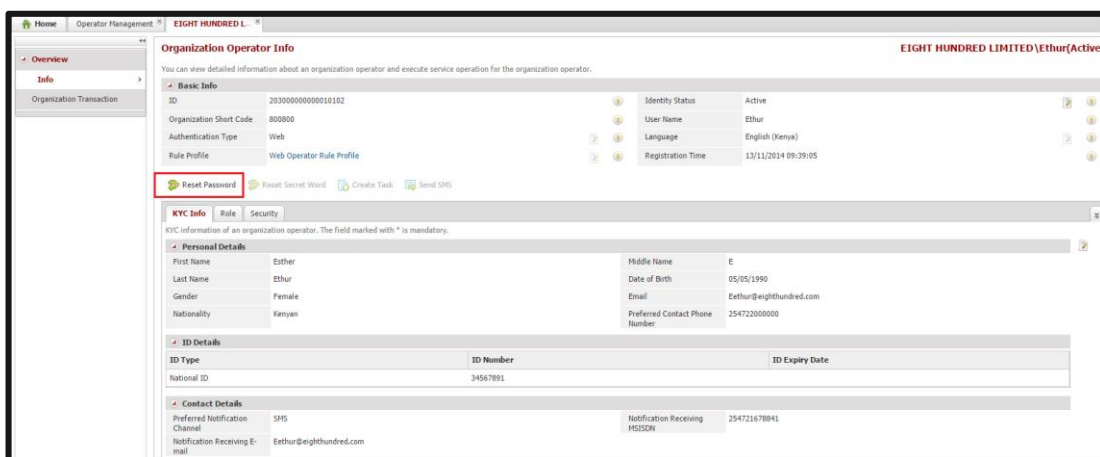
- ✓ Select My Functions
- ✓ Click on Operator Management



- Enter the username that is locked and click on search as shown.

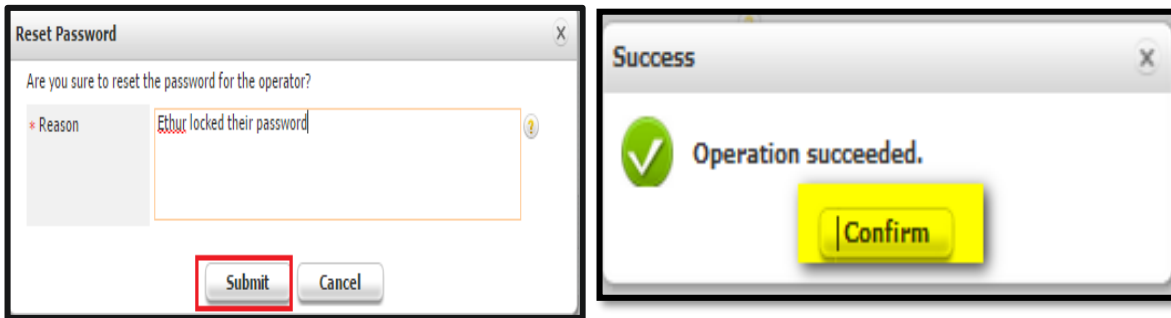


- ✓ Click on the operation icon alongside the username and wait for another page to pop up showing the Organization Operator Info.
- ✓ Select Reset Password





The **Reset Password** pop-up window will appear as shown below. Enter the reason for unlocking the password and click on **Submit**.

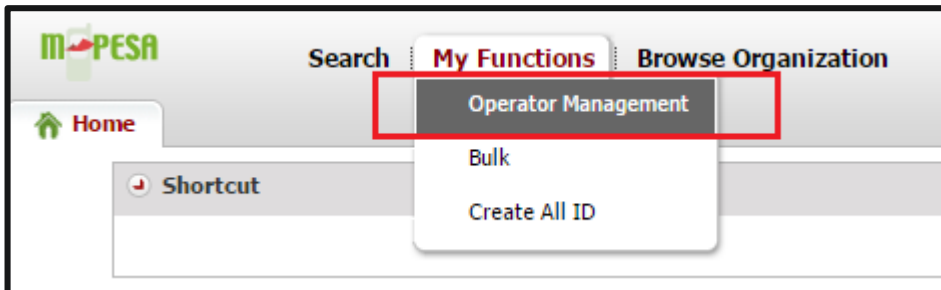


- The operation is successful if the window shown below appears. Select **Confirm**.

10.2 MANAGE OPERATOR STATUS

As the Business Administrator,

- ✓ Select **My Functions**
- ✓ Select **Operator Management**



- ✓ Enter the operators **User Name**
- ✓ Click on **Search**
- ✓ Click on the operation icon alongside the operators details



Home Operator Manage...

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: 800800

Operator ID: %

Role: All

Middle Name: %

Date of Birth: [Calendar Icon]

Status: All

User Name: %Ethur

First Name: %

Last Name: %

Sorting Query Results By: Please Select

Search

Add

ID	Organization Short Code	Organization Name	Operator ...	User Name	First Name	Middle Name	Last Name	Date of Birth	Role	Status	Suspended	Operation
203000000000010102	800800	EIGHT HUNDRED LIMITED	Ethur	Ethur	Esther	E	Ethur	05/05/1990	Business Web Operator	Active	No	[Edit Icon]

Total records: 1

10 records

- ✓ Go to Identity Status
- ✓ Click on the Edit icon

Home Operator Management EIGHT HUNDRED L...

Organization Operator Info

EIGHT HUNDRED LIMITED \Ethur(Active)

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

Basic Info

ID: 203000000000010102

Organization Short Code: 800800

Authentication Type: Web

Rule Profile: Web Operator Rule Profile

Identity Status: Active

User Name: Ethur

Language: English (Kenya)

Registration Time: 13/11/2014 09:39:05

Reset Password Reset Secret Word Create Task Send SMS

Edit Identity Status

Current Identity Status: Active

* Identity Status: Suspended

* Reason: Left the company

Submit Cancel



11. VIEWING STATEMENTS ON M-PESA

Downloading Utility Statements

Why perform this action?

To avail statements if need be for the organization. Every six month the data is archived.

Start Here

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

What to expect?

At the end of this action, the organization operator should be able to download any statement from the M-PESA website i.e. the Organization MMF Account Statement or the organization Utility Account Statement.

- ✓ Select **Browse Organization**
- ✓ Select **Review Transaction**
- ✓ Select the **Account Type**
- ✓ Select the **Completed Transaction** tab and click on **Search**
- ✓ A statement will appear in the format shown below.



Review Transaction 800800 - EIGHT HUNDRED LIMITED(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: Utility Account(500000000110251021)

Account No.	Account Type	Alias	Account Relationship	Current Balance	Available Balance	Reserved Balance	Unclear Balance	Status
500000000110251021	Utility Account	Utility Account	Owned	KSH 5,785,093.00	KSH 5,784,963.00	KSH 110.00	KSH 0.00	Active

Account No. Initiation Time Transaction Amount

No records found.

Total records: 0

Completed Transaction All Transaction

Completion Time: 01/10/2014 00:00:00 ~ 30/12/2014 23:59:59

Search Reset

Export

Receipt No.	Completion Time	Initiation Time	Details	Transaction Status	Withdrawn	Paid In	Balance	Operation
1L9403FGK	09/12/2014 10:45:55	09/12/2014 10:45:55	B2C Payment Charge	Completed	KSH -11.00		KSH 5,785,093.00	No operation can be performed.
1L9403FGK	09/12/2014 10:45:55	09/12/2014 10:45:55	Salary Payment to 254707163893 - JOAN KIM via WEB by MM SPlekanyua	Completed	KSH -65,000.00		KSH 5,785,104.00	No operation can be performed.
1KR703CKH	27/11/2014 13:59:28	27/11/2014 13:59:28	Salary Payment Reversal from 254712999200 due to Voucher Expiry	Completed		KSH 1,000.00	KSH 5,850,104.00	No operation can be performed.
1KR603CIB	27/11/2014 12:27:06	27/11/2014 12:27:06	B2C Payment Charge	Completed	KSH -11.00		KSH 5,849,104.00	No operation can be performed.
1KR603CIB	27/11/2014 12:27:06	27/11/2014 12:27:06	Payment to 2547071633373 - DENZEL WASHINGTON	Completed	KSH -201.00		KSH 5,849,115.00	No operation can be performed.
1KR503CI7	27/11/2014 12:27:06	27/11/2014 12:27:06	B2C Payment Charge	Completed	KSH -11.00		KSH 5,849,316.00	No operation can be performed.
1KR503CI7	27/11/2014 12:27:06	27/11/2014 12:27:06	Payment to 254702032895 - ricky whittle	Completed	KSH -200.00		KSH 5,849,327.00	No operation can be performed.

✓ To download the statement, click on **Export** and select the preferred format.

View of the organization utility statement in PDF format is as below

Account Holder: EIGHT HUNDRED LIMITED
Short Code: 800800
Account: Utility Account
Time Period: From 01/10/2014 00:00:00 To 30/12/2014 23:59:59

Receipt No.	Completion Time	Initiation Time	Details	Transaction Status	Paid In	Withdrawn	Balance	Reason Type	Other Party Info
1L9403FGK	09/12/2014 10:45:55	09/12/2014 10:45:55	B2C Payment Charge	Completed		-11.00	5,785,093.00	Salary Payment via Web	254707163893 - JOAN KIM
1L9403FGK	09/12/2014 10:45:55	09/12/2014 10:45:55	Salary Payment to 254707163893 - JOAN KIM via WEB by MM SPlekanyua	Completed		-65,000.00	5,785,104.00	Salary Payment via Web	254707163893 - JOAN KIM
1KR703CKH	27/11/2014 13:59:28	27/11/2014 13:59:28	Salary Payment Reversal from 254712999200 due to Voucher Expiry	Completed	1,000.00		5,850,104.00	Salary Payment Expire Reversal	254712999200
1KR603CIB	27/11/2014 12:27:06	27/11/2014 12:27:06	B2C Payment Charge	Completed		-11.00	5,849,104.00	Business Payment To Customer	2547071633373 - DENZEL WASHINGTON

At the bottom of the page, it will show who downloaded the statement and at what time.

Operator: Eightmeneja Organization: EIGHT HUNDRED LIMITED Date of Report: 30/12/2014 12:01:19



View of the organization utility statement in Microsoft Excel format:

Receipt No.	Completion Time	Initiation Time	Details	Transaction Status	Paid In	Withdrawn	Balance	Reason Type	Other Party Info
119403FGK	09/12/2014 10:45:55	09/12/2014 10:45:55	B2C Payment Charge	Completed		-11.00	5,785,093.00	Salary Payment via Web	254707163893 - JOAN KIM
119403FGK	09/12/2014 10:45:55	09/12/2014 10:45:55	Salary Payment to 254707163893 - JOAN KIM via WEB by MM SP/ekar	Completed		-65,000.00	5,785,104.00	Salary Payment via Web	254707163893 - JOAN KIM
1KR703CKH	27/11/2014 13:59:28	27/11/2014 13:59:28	Salary Payment Reversal from 254712999200 due to Voucher Expiry	Completed	1,000.00		5,850,104.00	Salary Payment Expire Reversal	254712999200
1KR603C8	27/11/2014 12:27:06	27/11/2014 12:27:06	B2C Payment Charge	Completed		-11.00	5,849,104.00	Business Payment To Customer	254707163373 - DENZEL W.
1KR603C8	27/11/2014 12:27:06	27/11/2014 12:27:06	Payment to 254707163373 - DENZEL WASHINGTON	Completed		-201.00	5,849,115.00	Business Payment To Customer	254707163373 - DENZEL W.
1KR503C7	27/11/2014 12:27:06	27/11/2014 12:27:06	B2C Payment Charge	Completed		-11.00	5,849,316.00	Business Payment To Customer	254702032895 - ricky whi
1KR503C7	27/11/2014 12:27:06	27/11/2014 12:27:06	Payment to 254702032895 - ricky whittle	Completed		-200.00	5,849,527.00	Business Payment To Customer	254702032895 - ricky whi
1KR803CEE	27/11/2014 11:07:50	27/11/2014 11:07:50	Journal Entry by MM SP/SFCTest1	Completed	500,000.00		5,849,527.00	Journal Entry	MM SP
1KR403CEA	27/11/2014 10:42:28	27/11/2014 10:42:28	Salary Payment Reversal from 254712999200 due to Voucher Expiry	Completed	1,000.00		5,349,527.00	Salary Payment Expire Reversal	254712999200
1KR703COT	27/11/2014 10:06:28	27/11/2014 10:06:28	Salary Payment Reversal from 254721678841 due to Voucher Expiry	Completed	1,000.00		5,348,527.00	Salary Payment Expire Reversal	254721678841

12. AUDIT LOG

Log in as the Business Auditor, Business Manager or Business Web Operator to see who has viewed the organization details:

- ✓ Select **Browse Organization**
- ✓ Select **Audit Log**
- ✓ Select the **Category** as **Query** and the time period
- ✓ Select **Search**, it will populate as below



Home Browse Organization... **Audit Log** 800800 - EIGHT HUNDRED LIMITED(Active)

You can query live audit logs about various activities and operations related to an organization and export the query result in files in different formats to a local directory.

Search for Audit Log

Category: Query Event: All

Time: 31/12/2013 00:00:00 ~ 30/12/2014 23:59:59

Search Reset

Export

Initiator Type	Initiator	Time	Event	Operation
Organization Operator	EIGHT HUNDRED LIMITED\Eightdita	30/12/2014 12:58:14	View Organization Details	
Organization Operator	EIGHT HUNDRED LIMITED\Eightdita	30/12/2014 12:55:16	View Organization Details	
Organization Operator	EIGHT HUNDRED LIMITED\Eightdita	30/12/2014 12:52:51	View Organization Details	
Organization Operator	EIGHT HUNDRED LIMITED\EightAdmin	30/12/2014 12:50:45	View Organization Details	
Organization Operator	EIGHT HUNDRED LIMITED\Eightmenea	30/12/2014 11:50:23	View Organization Details	
Organization Operator	EIGHT HUNDRED LIMITED\Eightmenea	30/12/2014 11:50:20	View Organization Details	
Organization Operator	EIGHT HUNDRED LIMITED\Eightmenea	30/12/2014 11:34:17	View Organization Details	
Organization Operator	EIGHT HUNDRED LIMITED\Eightmenea	30/12/2014 11:33:32	View Organization Details	
SP Operator	MM SP\mzioka	30/12/2014 09:58:15	View Organization Details	
SP Operator	MM SP\maina1	30/12/2014 09:45:39	View Organization Details	
SP Operator	MM SP\maina1	30/12/2014 09:32:53	View Organization Details	
SP Operator	MM SP\user20	23/12/2014 09:03:24	View Organization Details	

To see who has done any organization identity changes:

- ✓ Select **Browse Organization**
- ✓ Select **Audit Log**
- ✓ Select the **Category** as **Identity Management** and the time period
- ✓ Select **Search**, it will populate as below

Home Browse Organization... **Audit Log** 800800 - EIGHT HUNDRED LIMITED(Active)

You can query live audit logs about various activities and operations related to an organization and export the query result in files in different formats to a local directory.

Search for Audit Log

Category: Identity Management Event: All

Time: 31/12/2013 00:00:00 ~ 30/12/2014 23:59:59

Search Reset

Export

Initiator Type	Initiator	Time	Event	Identity	Operation
SP Operator	MM SP\maina	27/11/2014 11:04:15	Change Organization Product	800800 - EIGHT HUNDRED LIMITED	
SP Operator	MM SP\SFCTest1	27/11/2014 09:45:10	Change Organization Product	800800 - EIGHT HUNDRED LIMITED	
SP Operator	MM SP\mzioka	18/11/2014 07:49:15	Change Organization Charge Profile	800800 - EIGHT HUNDRED LIMITED	
SP Operator	MM SP\mzioka	18/11/2014 07:29:39	Change Organization Charge Profile	800800 - EIGHT HUNDRED LIMITED	
SP Operator	MM SP\mzioka	13/11/2014 09:35:00	Create Top Organization	800800 - EIGHT HUNDRED LIMITED	

Total records: 5



- ✓ Select **Audit Log**
- ✓ Select the **Category** as **Account Management** and the time period
- ✓ Select **Search**, it will populate as below

Audit Log 800800 - EIGHT HUNDRED LIMITED(Active)

You can query live audit logs about various activities and operations related to an organization and export the query result in files in different formats to a local directory.

Search for Audit Log

Category: Account Management Event: All

Time: 31/12/2013 00:00:00 ~ 30/12/2014 23:59:59

Search Reset

Export

Initiator Type	Initiator	Time	Event	Identity	Operation
SP Operator	MM SP(SFCTest1	27/11/2014 09:45:10	Create Account	800800 - EIGHT HUNDRED LIMITED	Download
SP Operator	MM SP(SFCTest1	27/11/2014 09:45:10	Create Account	800800 - EIGHT HUNDRED LIMITED	Download

Total records: 2

10 records