

GYE NTOBOA

MANUAL 3 - AGENTS TRAINING

PROCESS GUIDE 04 / 06

Update property and business profiles or collect data

Capture verified property, business or rate payer information under the assigned service scope and follow supervisor review before treating a proposed change as an approved live record.

WHO THIS IS FOR

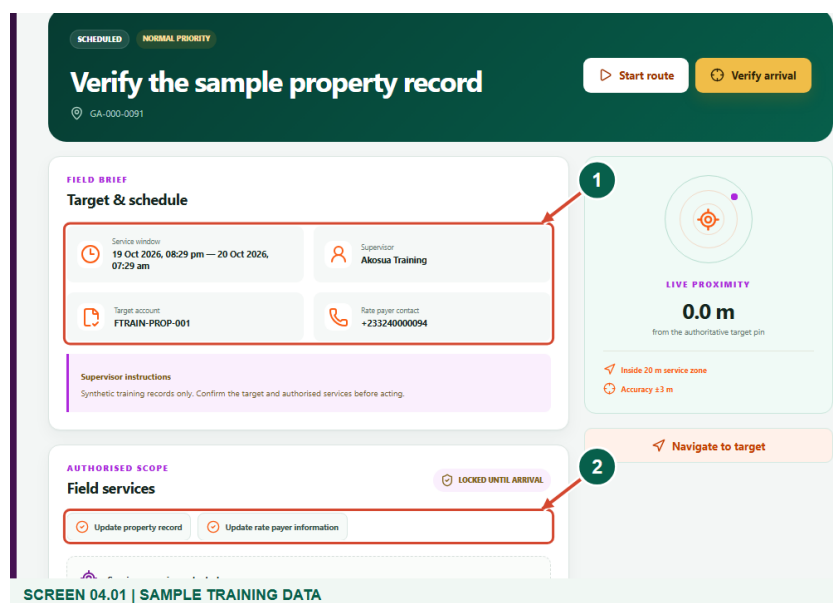
Field agent

ALLOW ABOUT

15-25 minutes

DOCUMENT VERSION

1.0 | 19 October 2026



Illustrated steps with numbered arrows and clear expected results.

About the examples

Screens show the actual application in a training environment with sample data. Use your own verified account, assigned records and contact details when following the guide.

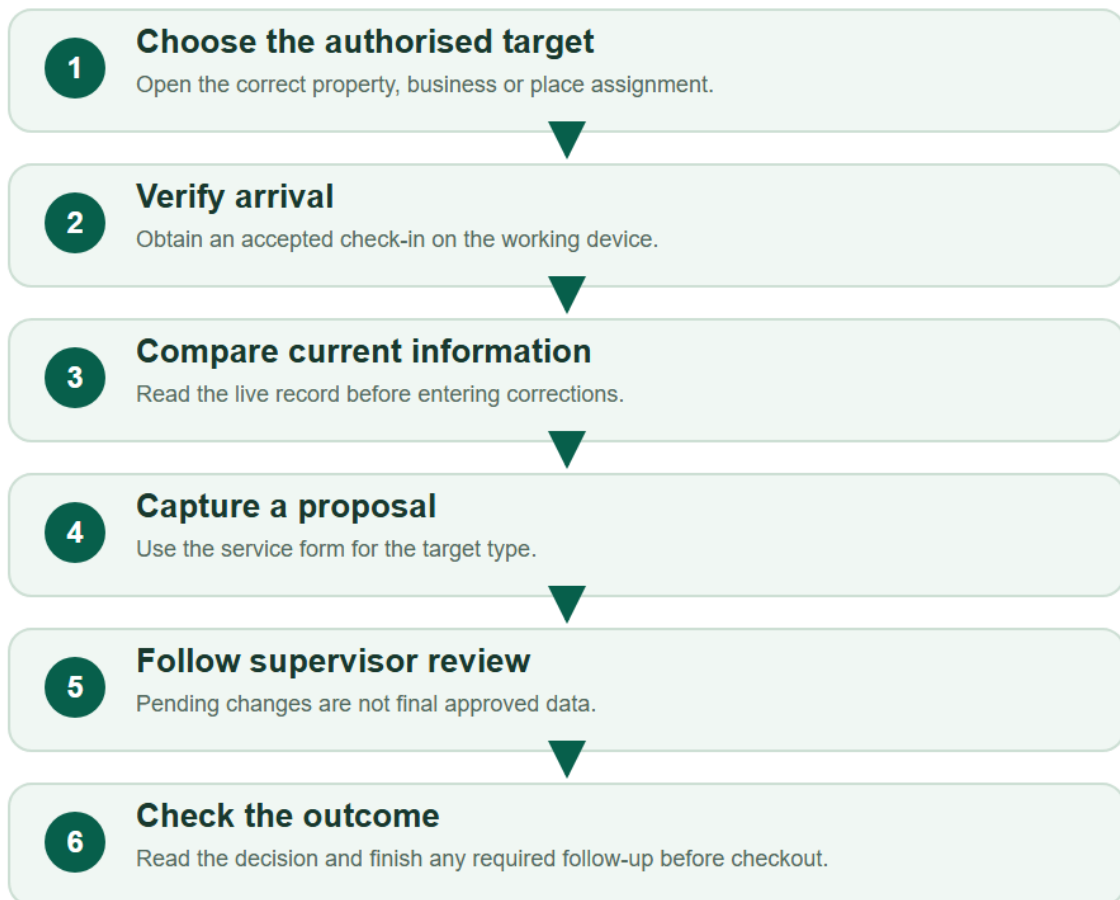
Website: operations.gyentoboa.com

Process flow

Follow the arrows from start to finish. Optional routes are explained in the numbered steps.

Before you start

- Obtain a visit with the relevant authorised service: Update property record, Update business record or Update rate payer information.
- Prepare verified source details and follow assembly procedures for valuation, classification and personal data. Collect only what is needed for the assignment.
- Keep location permission enabled. The default GPS requirement is accuracy of 15 metres or better and a reading captured within 60 seconds. When the distance check is on, distance to the target plus GPS uncertainty must fit within 20 metres.



Numbered markers on screenshots identify the controls described beneath each image.

STEP 01

Choose the correct update assignment

1. Open My work and select the visit for the intended property or business.
2. Confirm its target reference and authorised service. Property, business and rate payer forms are alternatives determined by the allocated scope.

Verify the sample property record

GA-000-0091

FIELD BRIEF

Target & schedule

Service window
19 Oct 2026, 08:29 pm — 20 Oct 2026, 07:29 am

Supervisor
Akosua Training

Target account
FTRAIN-PROP-001

Rate payer contact
+233240000094

Supervisor instructions
Synthetic training records only. Confirm the target and authorised services before acting.

AUTHORISED SCOPE

Field services

Update property record

Update rate payer information

LOCKED UNTIL ARRIVAL

LIVE PROXIMITY

0.0 m
from the authoritative target pin

Inside 20 m service zone

Accuracy ±3 m

Navigate to target

SCREEN 04.01 | SAMPLE TRAINING DATA

Synthetic training data in the actual agent portal. Choose the correct update assignment.

- 1 Correct target and assigned services
- 2 Permitted update services

What should happen

The brief identifies the target and permitted update type.

STEP 02

Verify arrival and compare the current record

1. Reach the target and choose Verify arrival using a fresh accurate fix.
2. Read Live account, billing & collection position and the Current property or Current business record before changing anything.

10000 Keep current setting

Occupancy status Valuation number

Update notes

Verify location & record service

360° RECORD OVERVIEW

Live account, billing & collection position Refresh

Active billed GH¢600.00

Paid on account GH¢0.00 1

Outstanding GH¢0.00 2

Agent-issued / paid GH¢0.00 / GH¢0.00

Current property record

Account No FTRAIN-PROP-001

Hsno 12

Digitaladdress GA-000-0091

Location Sample Training Avenue

Streetname Sample Training Avenue

Rateable Value 10000

Classification & rate

No classification configuration is linked.

Rate payer record

Erms Id ERMS990091

Fname Sample

Lname Ratepayer

Email ratepayer.field.training@example.test

Phone No Primary +233240000094

SCREEN 04.02 | SAMPLE TRAINING DATA

Synthetic training data in the actual agent portal. Verify arrival and compare the current record.

- 1 Current property record
- 2 Rate payer record

What should happen

The service is unlocked and you have checked the existing information.

STEP 03

Propose verified property corrections

1. For a property visit, choose Update property record. Correct supported details such as house number, digital address, street, locality or occupancy status.
2. Use classification, rateable value and valuation fields only with the required evidence and authority. Add useful Update notes and recheck the target before submitting.

Update property record Update rate payer information

Service to record
Update property record

House number: 24B Digital address: GA-000-0091

Street name: Sample Training Avenue Locality: Sample Training Avenue

Property classification / revenue rate: Keep current classification

Rateable value: 10000 Rated property: Keep current setting

Occupancy status: Owner occupied Valuation number:

Update notes

SCREEN 04.03 | SAMPLE TRAINING DATA

Synthetic training data in the actual agent portal. Propose verified property corrections.

- 1 Verified house number
- 2 Property classification

What should happen

The property form contains a justified proposal rather than an unverified guess.

STEP 04

Submit and inspect the pending comparison

1. Choose Verify location & record service.
2. Look for the notice that the proposal was sent to the supervisor. In Initial and proposed information, compare before and proposed values and note the pending status.

Current property record

Account No	FTRAIN-PROP-001
Hseno	12
Digitaladdress	GA-000-0091
Location	Sample Training Avenue
Streetname	Sample Training Avenue
Rateable Value	10000
Updated At	2026-10-19T18:29:23+00:00

Classification & rate

No classification configuration is linked.

Rate payer record

Erms Id	ERMS990091
Fname	Sample
Lname	Ratepayer
Email	ratepayer.field.training@example.test
Phone No Primary	+233240000094

IMMUTABLE AUDIT COMPARISON

Initial and proposed information

Property update - 19 Oct 2026, 09:45 pm

Kojo Training submitted 4 changes

PENDING

Hseno	
INITIAL	12
PROPOSED	248

Rateable Value	
INITIAL	10000.00
PROPOSED	10000

Occupancy Status	
INITIAL	Not recorded
PROPOSED	Owner occupied

Remarks	
INITIAL	Not recorded
PROPOSED	Verified sample house number and occupancy during the training visit.

SCREEN 04.04 | SAMPLE TRAINING DATA

Synthetic training data in the actual agent portal. Submit and inspect the pending comparison.

- 1 Initial and proposed information
- 2 Pending review comparison

What should happen

The proposal is recorded for review; pending values have not silently replaced the live register.

STEP 05

Business alternative: capture the correct profile

1. For a business assignment, choose Update business record instead. Check business name, registration or permit, quantity, contact, address and the permitted classification fields.
2. Submit the verified proposal through the same location-checked service button. Do not copy property details into a business record.

The screenshot shows a web form titled 'Update business record' with a dropdown menu set to 'Update business record'. Below this, there are several input fields: 'Business name' (containing 'Ama Training Supplies'), 'Registration number' (empty), 'Permit number' (containing 'FTRAIN-2026-001'), 'Business classification / revenue rate' (a dropdown menu set to 'Keep current classification'), 'Quantity' (containing '0'), 'Business phone' (containing '+233240000094'), 'Business email' (empty), 'Digital address' (containing 'GA-000-0092'), and 'Locality' (empty). Two red circles with numbers '1' and '2' are placed over the 'Business name' and 'Business classification / revenue rate' fields respectively, with red arrows pointing to them. The form is enclosed in a light gray border.

SCREEN 04.05 | SAMPLE TRAINING DATA

Synthetic training data in the actual agent portal. Business alternative: capture the correct profile.

- 1 Business name
- 2 Business classification

What should happen

The business proposal is saved for the same controlled review process.

STEP 06

Rate payer information alternative

1. Where authorised, choose Update rate payer information. Verify the linked person or organisation and correct only supported identity, phone, email or address fields.
2. For an Other place assignment without an existing linked record, this service captures field information in the audit trail; it does not automatically register a new property, business or customer account.

Service to record

Update rate payer information

First name: Sample

Last name: Ratepayer

Organisation:

Primary phone: +233240000094

Email: ratepayer.field.training@example.te

Digital address:

Residential address: 24B Sample Training Avenue

Verify location & record service

AUDIT TIMELINE

Service recorded

SCREEN 04.06 | SAMPLE TRAINING DATA

Synthetic training data in the actual agent portal. Rate payer information alternative.

- 1 Update rate payer information
- 2 Verified contact details

What should happen

The requested information is captured under the actual assignment context.

STEP 07

Read the supervisor decision before finishing

1. Reopen the assignment to refresh Initial and proposed information and read the approval status and any Supervisor note.
2. An approved proposal is applied by the controlled review process. If rejected, discuss the reason and submit an appropriate corrected proposal; the agent cannot approve their own change.

The screenshot displays a property update interface. At the top, a 'Residential Address' section shows 'INITIAL' as 'Not recorded' and 'PROPOSED' as '24B Sample Training Avenue'. Below this is a 'Supervisor note' section with a green checkmark icon and the text: 'Reviewed the synthetic training proposal against the displayed original values and verified field evidence.' A red circle with the number '1' and a red arrow points from this note to a larger red-bordered box below. This box contains a 'Property update' header with the date '19 Oct 2026, 09:45 pm' and a status badge labeled 'APPROVED'. The main content of the red box is titled 'Kojo Training submitted 4 changes' and includes four comparison tables: 'Hseno' (INITIAL: 12, PROPOSED: 24B), 'Rateable Value' (INITIAL: 10000.00, PROPOSED: 10000), 'Occupancy Status' (INITIAL: Not recorded, PROPOSED: Owner occupied), and 'Remarks' (INITIAL: Not recorded, PROPOSED: Verified sample house number and occupancy during the training visit.). Below these tables is another 'Supervisor note' section with the same text as the one above. At the bottom of the screenshot, a 'BILL LINEAGE' section titled 'Current and superseded bills' shows a table with columns for bill status, ID, year, billed amount, paid amount, and due amount. The table contains one row: 'Active', 'FTRAIN-RATE-2026-001', '2026', 'GH¢600.00 billed', 'GH¢0.00 paid', and 'GH¢600.00 due'.

SCREEN 04.07 | SAMPLE TRAINING DATA

Synthetic training data in the actual agent portal. Read the supervisor decision before finishing.

1 Approved property comparison

What should happen

You know whether the update is pending, approved or rejected and which information is authoritative.

STEP 08

Complete the remaining workflow and check out

1. Wait for pending record decisions. If an instant replacement bill is authorised and required, follow its separate approval-to-generation workflow; approving a profile does not itself issue a replacement bill.
2. Choose Complete & check out only when the remaining approval or rebill workflow is resolved.

The screenshot displays the agent portal interface. At the top, there are four information cards: 'Service window' (19 Oct 2026, 08:29 pm — 20 Oct 2026, 07:29 am), 'Supervisor' (Akosua Training), 'Target account' (FTRAIN-PROP-001), and 'Rate payer contact' (+23324000094). Below these is a 'Supervisor instructions' box with the text: 'Synthetic training records only. Confirm the target and authorised services before acting.'

The main section is titled 'AUTHORISED SCOPE' and 'Field services'. It contains two buttons: 'Update property record' and 'Update rate payer information'. Below these is a 'Service to record' dropdown menu set to 'Update property record'. There are four input fields: 'House number' (24B), 'Digital address' (GA-000-0091), 'Street name' (Sample Training Avenue), and 'Locality' (Sample Training Avenue). At the bottom, it says 'Property classification / revenue rate'.

On the right side, there is a 'LIVE PROXIMITY' section showing '0.0 m from the authoritative target pin'. Below this are two buttons: 'Navigate to target' and 'Complete & check out'. A red circle with the number '1' and an arrow points to the 'Complete & check out' button. A 'UNLOCKED ON SITE' badge is also visible.

SCREEN 04.08 | SAMPLE TRAINING DATA

Synthetic training data in the actual agent portal. Complete the remaining workflow and check out.

1 Complete & check out

What should happen

The visit can close with completed evidence and no unresolved controlled workflow.

Check your result

- The correct target and current record were checked.
- Each proposed change has verified evidence and an audit comparison.
- Pending review, rejection and approved live changes are clearly distinguished.

If you need help

A needed field or service is unavailable

Confirm the target type and scope with the supervisor. The agent form supports selected fields and is not unrestricted register administration.

Proposal remains pending

Ask the assigned supervisor to review it. Do not claim that the live record has changed or repeatedly submit the same proposal.

Checkout is disabled

Resolve pending profile decisions and pending or approved-but-ungenerated rebills with the supervisor before completing the visit.

Useful things to know

- These are controlled update and information-capture workflows, not unrestricted property, business or rate payer registration.
- Profile approval and replacement billing are separate decisions. Historical payment or bill records are not overwritten by an agent editing a form.
- An administrator can turn off the distance boundary for the assembly. That does not remove GPS accuracy, freshness, verified arrival, assignment ownership, service scope or same-device checks.

Continue learning

- Guide 01: Access your agent account
- Guide 02: Distribute bills
- Guide 03: Initiate bill payments
- Guide 05: Find your supervisor

[Download all 6 guides in this collection](#)

For account or bill-record corrections, contact the relevant assembly using its verified contact details. Keep your account or bill reference available when requesting assistance.