

GYE NTOBOA

MANUAL 1 - RATE PAYER TRAINING

PROCESS GUIDE 02 / 08

Create a rate payer account as assembly staff

Create the correct payer record in your assembly and hand access to the payer through private password setup or recovery.

WHO THIS IS FOR

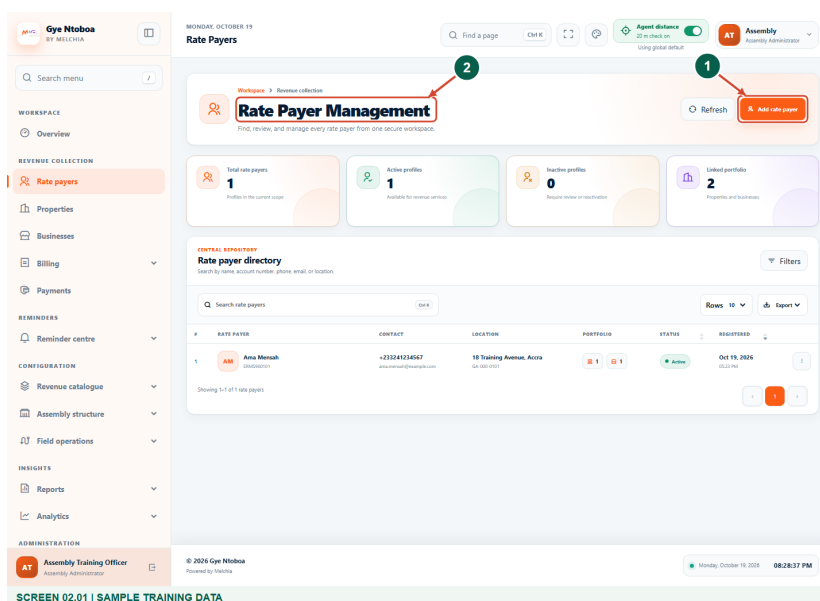
Authorised assembly staff with permission to view and create rate payers. Secure password setup requires the relevant administrator and reset permissions.

ALLOW ABOUT

8-12 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, bill and contact details when following the guide.

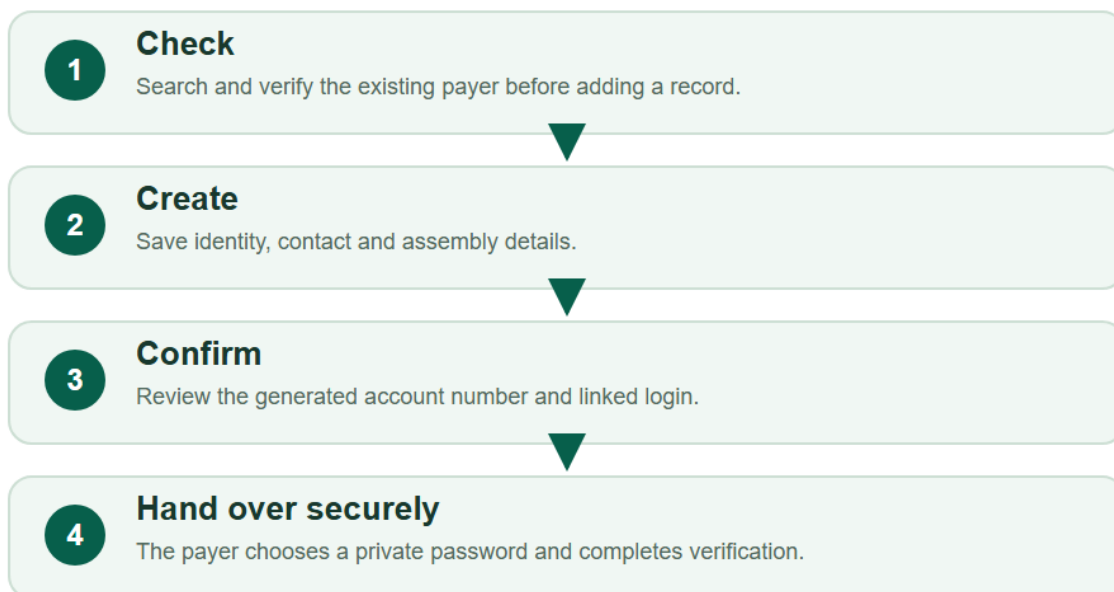
Website: gyentoboa.com

Process flow

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

Before you start

- Use your own authorised assembly staff account. Do not share staff logins.
- Search for an existing payer first. Have verified identity and phone details; email setup requires a real payer-controlled email.
- The staff workspace is <https://assembly.gyentoboa.com>. The payer website is <https://gyentoboa.com>.
- Screenshots use Training Municipal Assembly and synthetic people, records and contacts.



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

STEP 01

Find the rate payer directory

1. Sign in to <https://assembly.gyentoboa.com> with your own authorised assembly staff account. Open Rate payers in the sidebar.
2. Search by name, account number or phone before creating another record. If the person already exists, review the existing profile instead.
3. For a new payer, select Add rate payer.

MONDAY, OCTOBER 19

Rate Payers

Find a page Ctrl K

Agent distance 20 m check on Using global default

Assembly Administrator

Workspace > Revenue collection

Rate Payer Management

Find, review, and manage every rate payer from one secure workspace.

Refresh Add rate payer

Total rate payers 1 Profiles in the current scope

Active profiles 1 Available for revenue services

Inactive profiles 0 Require review or reactivation

Linked portfolio 2 Properties and businesses

CENTRAL REPOSITORY

Rate payer directory

Search by name, account number, phone, email, or location.

Filters

Search rate payers Ctrl K

Rows 10 Export

#	RATE PAYER	CONTACT	LOCATION	PORTFOLIO	STATUS	REGISTERED
1	AM Ama Mensah EBM5500101	+233241234567 ama.mensah@example.com	18 Training Avenue, Accra GA-000-0101	1 1	Active	Oct 19, 2026 05:23 PM

Showing 1-1 of 1 rate payers

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Powered by Melchia

Monday, October 19, 2026 08:28:37 PM

SCREEN 02.01 | SAMPLE TRAINING DATA

Local training capture with synthetic data.

- 1 Add rate payer
- 2 Rate Payers directory

What should happen

The Add a rate payer form opens.

Helpful note: Verify contacts and assembly. A matching name alone does not prove identity.

STEP 02

Enter the identity details

1. Enter the First name and Last name, then select Gender.
2. Enter the Tax identification number only when a valid reference is available.
3. Use the person's own details. Esi Boateng in this guide is a synthetic training example.

The screenshot shows a 'Personal information' form with the following fields and annotations:

- First name ***: Input field with placeholder 'e.g. Ama'. An arrow labeled '2' points to this field.
- Last name ***: Input field with placeholder 'e.g. Mensah'. An arrow labeled '1' points to this field.
- Gender ***: Dropdown menu with 'Select gender' and a downward arrow. An arrow labeled '3' points to this field.
- Tax identification number**: Input field with placeholder 'TIN or tax reference'.

Below the 'Personal information' section are the 'Contact details' and 'Address and jurisdiction' sections, which are not annotated with numbers in this specific screenshot.

SCREEN 02.02 | SAMPLE TRAINING DATA

Local training capture with synthetic data.

- 1 First name
- 2 Last name
- 3 Gender

What should happen

Required identity details are complete.

Helpful note: Do not replace the person's name with a property or business name.

STEP 03

Check the contact details

1. Choose the correct country and enter a valid Phone number.
2. Enter the payer's own Email address when available. A genuine email is required for the optional email setup link.
3. Confirm these contacts with the payer. The phone and email must not already belong to a different login.

Contact details
 Used for account access, notices, receipts, and reminders.

2

1

Phone number *

+233

+233 24 123 4569

Choose a country, then enter the number in its familiar local format.

Email address

esi.boatang@example.com

Optional when the payer does not use email.

Address and jurisdiction
 Location details used to connect the payer with the correct authority.

House number

House or unit number

Digital address

Digital or location code

Residential address

Street, town, district

Postal address

P.O. Box or postal address

Assembly *

Training Municipal Assembly

SCREEN 02.03 | SAMPLE TRAINING DATA

Local training capture with synthetic data.

- 1 Phone number
- 2 Email address

What should happen

The payer's contacts are ready for validation and future recovery.

Helpful note: Email is optional for creating the record. Never invent an email for a payer who does not use one.

STEP 04

Review the assembly and save

1. Complete the available House number, Digital address, Residential address and Postal address.
2. Check the read-only Assembly field. A record created by assembly staff is automatically assigned to their own assembly.
3. Select Create rate payer once and wait. Correct any highlighted validation errors before trying again.

Choose a country, then enter the number in its familiar local format. Optional when the payer does not use email.

Address and jurisdiction

Location details used to connect the payer with the correct authority.

House number: 24

Digital address: GA-000-0202

Residential address: 24 Training Avenue, Accra

Postal address: P.O. Box 20, Training Town

Assembly: Training Municipal Assembly

Secure record: Changes are validated before they are saved.

Cancel Create rate payer

SCREEN 02.04 | SAMPLE TRAINING DATA

Local training capture with synthetic data.

- 1 Residential address
- 2 Your assembly is automatic
- 3 Create rate payer

What should happen

The saved profile opens with a generated ERMS account number.

Helpful note: The system generates the account number. Staff do not choose or share a temporary password.

STEP 05

Confirm the profile and linked login

1. Review the name, phone, email, Active status, assembly and generated account number.
2. A linked customer login is created automatically. The registration reminder tells an administrator-created payer to use Forgot password to choose a private password.
3. A new profile starts without linked property or business records. Authorised staff must associate the correct revenue records with the correct payer.

Rate payers > ERMS559052

Rate payer profile

A complete view of the payer and every linked revenue record.

← Directory **Reset password** Edit profile

1 **2**

EB Active

Esi Boateng

ERMS559052

Call Email

0 Properties 0 Businesses Oct 2026 Registered Training Municipal Assembly Assembly

PROFILE HEALTH Record overview

VERIFIED PROFILE Personal and contact information

SCREEN 02.05 | SAMPLE TRAINING DATA

Local training capture with synthetic data.

- 1 Rate payer profile
- 2 Reset password

What should happen

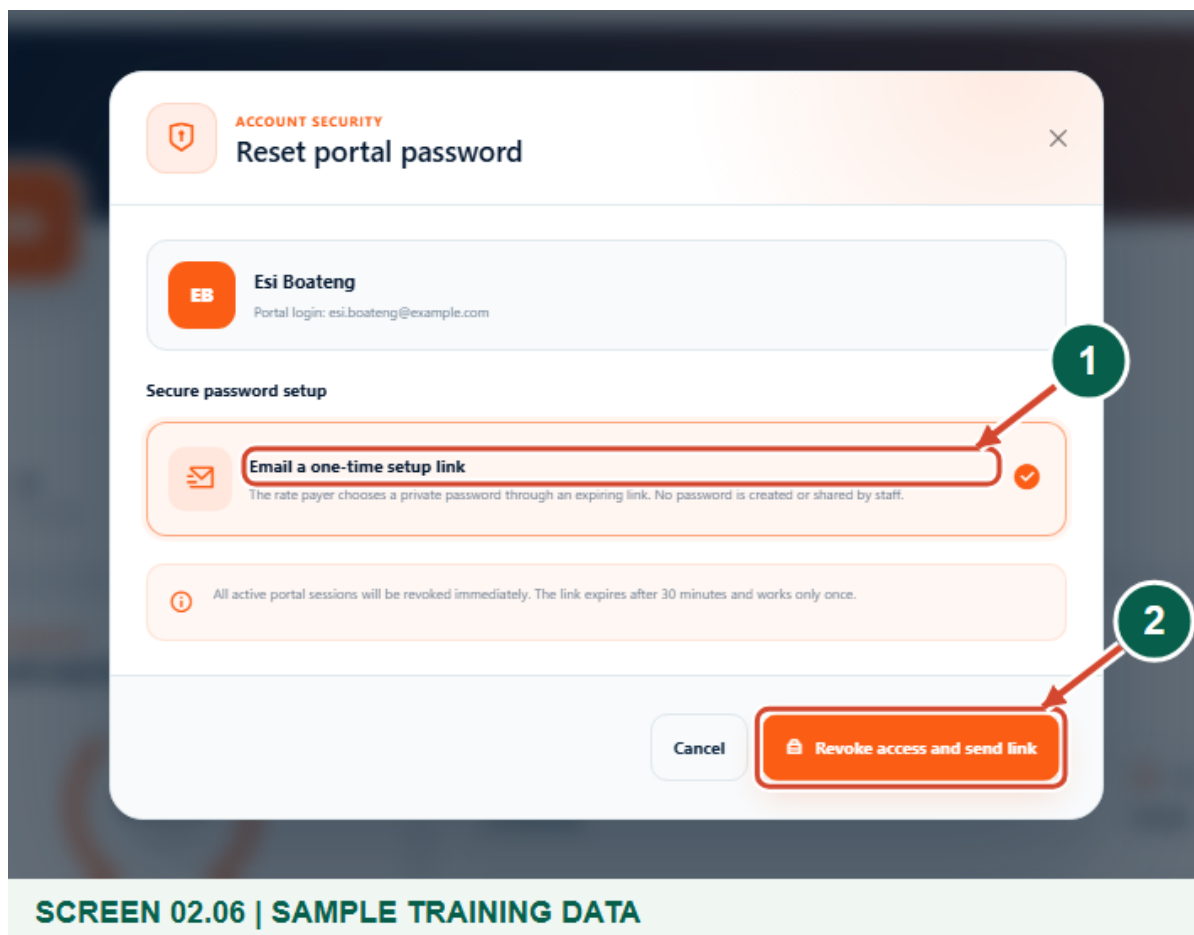
A saved payer profile and linked portal identity exist.

Helpful note: A new online registration alone does not authorise access to old bills or another person's records.

STEP 06

Offer a secure email setup link

1. If you have the separate Reset password permission and the payer has a usable email address, select Reset password on the profile.
2. Review Email a one-time setup link and the warning that existing portal sessions will be revoked.
3. If this setup or recovery action is intended, select Revoke access and send link. If the control is absent, contact an authorised administrator.



Local training capture with synthetic data.

- 1 Email a one-time setup link
- 2 Revoke access and send link

What should happen

An expiring, single-use setup link is queued for email delivery.

Helpful note: The payer can also use Forgot password with their registered phone. Never send setup links to placeholder or third-party addresses.

STEP 07

Check the queued confirmation

1. Confirm the message that sessions were revoked and a one-time setup link was queued.
2. Ask the payer to check their own inbox and spam folder. Queued does not mean delivered.
3. If no message arrives, verify the address and ask support to check delivery. Do not create a duplicate payer to solve a delivery problem.

The screenshot shows the 'Rate payer profile' page for Esi Boateng (ERMS559052). At the top, there are buttons for 'Directory', 'Reset password', and 'Edit profile'. A green circle with the number '1' points to a notification banner that reads 'Request completed' and 'All portal sessions were revoked and a one-time password setup link was queued for secure email delivery.' Below the banner, the profile details for Esi Boateng are shown, including an 'Active' status, a 'Call' button, and an 'Email' button. At the bottom, there are four summary cards: '0 Properties', '0 Businesses', 'Oct 2026 Registered', and 'Training Municipal Assembly Assembly'.

Rate payer profile
A complete view of the payer and every linked revenue record.

← Directory Reset password Edit profile

1

Request completed
All portal sessions were revoked and a one-time password setup link was queued for secure email delivery.

EB Active

Esi Boateng
ERMS559052

Call Email

0 Properties 0 Businesses Oct 2026 Registered Training Municipal Assembly Assembly

SCREEN 02.07 | SAMPLE TRAINING DATA

Local training capture with synthetic data.

1 Setup link queued

What should happen

The intended setup or reset request is recorded.

Helpful note: Training messages are captured locally. No real SMS or email is sent.

STEP 08

Let the payer set a private password

1. The payer opens their own email link before it expires. The default validity is 30 minutes, and the link works only once.
2. The payer enters New password and Confirm new password, then selects Save password and continue. Use at least 8 characters with uppercase, lowercase and a number.
3. The payer signs in at <https://gyentoboa.com> using their registered phone or email and completes SMS verification when prompted. Staff must never request the password or one-time code.

The screenshot shows a web form titled "Set your portal password". Below the title is a subtitle: "Enter and confirm the password you will use in the rate payer portal." The form contains three main input areas: a "New password" field with a "Show" toggle, a "Confirm new password" field, and an orange "Save password and continue" button. Three numbered callouts (1, 2, 3) are present on the right side of the form, with arrows pointing to the "New password" field, the "Confirm new password" field, and the "Save password and continue" button respectively.

Set your portal password

Enter and confirm the password you will use in the rate payer portal.

New password

Confirm new password

Save password and continue

SCREEN 02.08 | SAMPLE TRAINING DATA

Local training capture with synthetic data.

- 1 New password
- 2 Confirm new password
- 3 Save password and continue

What should happen

The payer can complete private password setup and use the normal sign-in verification flow.

Helpful note: An expired or used link cannot be reused. Request a fresh link or use Forgot password.

Check your result

- One correct payer profile is saved in the intended assembly with its generated account number.
- The phone and any supplied email have been checked.
- The payer knows how to set a private password and complete sign-in verification. No password or OTP was shared with staff.
- Any required asset or portal linking is assigned to an authorised officer rather than assumed from registration.

If you need help

The payer, phone or email already exists.

Review the existing profile and verify ownership. Do not alter contacts simply to bypass duplicate validation.

Add rate payer or Reset password is missing.

Ask an authorised administrator to review your role permissions and jurisdiction.

The payer has no usable email.

Leave optional email blank. Guide the payer to Forgot password using their registered phone; do not send an email link to a placeholder.

The setup link expired or was already used.

Request a new authorised one-time link or use Forgot password. The old link cannot be reused.

Older assets or bills are not visible after sign-in.

Ask the revenue office to check the exact owner, asset and verified portal links. Registration alone does not authorise historical records.

No SMS or email arrives.

Recheck contacts and ask support to inspect delivery. A queued notification is not a delivery guarantee.

Useful things to know

- A reusable temporary password is not provided. Use private password setup or the payer website's Forgot password process.
- The optional email setup action revokes current portal sessions. It requires an authorised administrator and a valid payer-controlled email.
- Creating a login does not by itself authorise historical property or business records. The assembly must verify the correct record links.

Continue learning

- Guide 01: Register a rate payer account
- Guide 03: Access your rate payer account on the web
- Guide 04: View bills and arrears

[Download all eight training guides](#)

[Open Help and support](#)

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.