

| Training Agenda



- Introduction
- Profile Settings
- Application Settings
- Users
- Personalizing 'My Settings'
- Mailboxes
- How to Contact Support

Greetings



Welcome to Anytime Mailbox! We are thrilled to partner with you and provide you with comprehensive training to ensure that you and your staff have a thorough understanding of our software.

Our training program is designed for both new and long-time operators, and we are confident that it will equip you with the necessary knowledge to effectively use our software.

This is the first deck in our 5-part series, which focuses on account set up. In this series, we provide a complete walk-through on how to set up your account. Even if you have been a long-time operator with us, we recommend reviewing this deck to ensure that you have checked all your account settings.

If you have any additional questions after completing this course, please do not hesitate to contact us. We are committed to providing you with the support and training needed for a successful partnership.

Thank you for choosing Anytime Mailbox. We are excited about the prospect of working with you and achieving success together!



What's next? Admin Settings: Profile

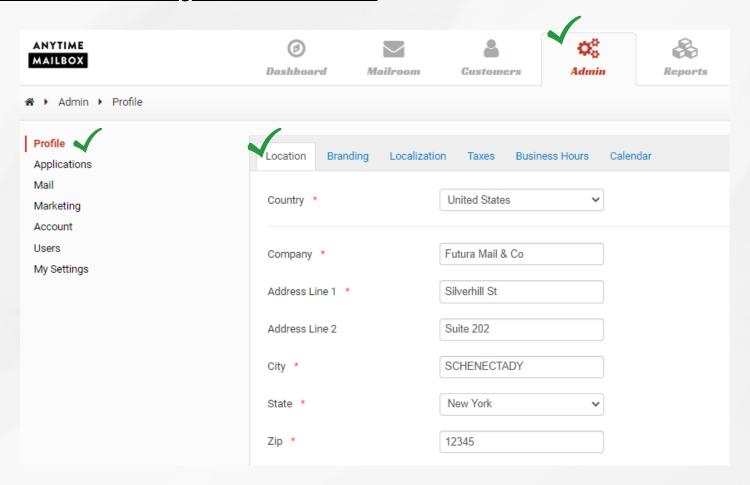




Profile - Location

Once you click on the '**Admin**' tab, the system will automatically take you to the '**Profile**' subtab. The first section you'll find is related to your **location**.

It is important that you input the correct address as this is where your renters will be sending their mail items to.



ANYTIME MAILBOX

Profile - Location

in the 'Location' section, you have the option to include a contact number, email address, and website for your mailbox location.

It's always a good idea to keep this information up to date, as it is visible to your mailbox renters. Moreover, we at Anytime Mailbox also use this information to contact you if needed.

Renter Support Phone *	+1 > 310 618 1223
Renter Support Email *	denisemartinez@anytimemailbox
Renter Support Website	

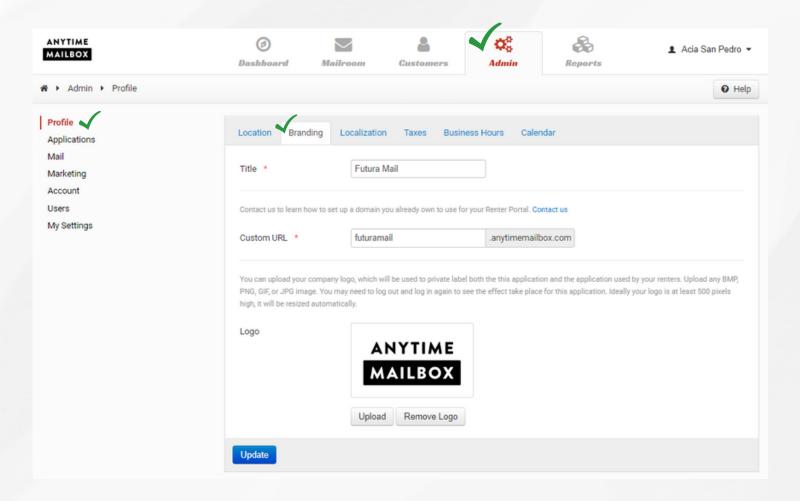




Profile - Branding

After the 'Profile' subtab, the next one is 'Branding'.

This is the perfect spot to *input or update your business name, as well as upload or change your logo* which will be visible on the platform.

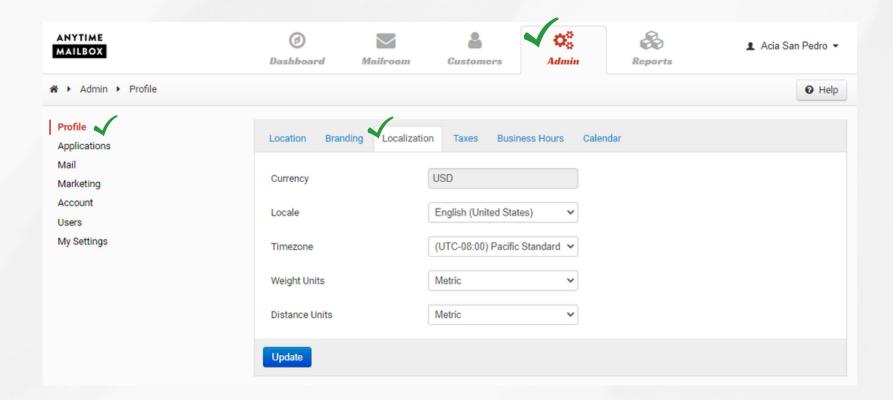




Profile - Localization

The 'Localization' subtab is up next, and it's a handy spot where you can change the time zone of the platform and also adjust the language as required.

Additionally, you can easily *update or change the measurement and weight units used in the platform* to suit your preferences.



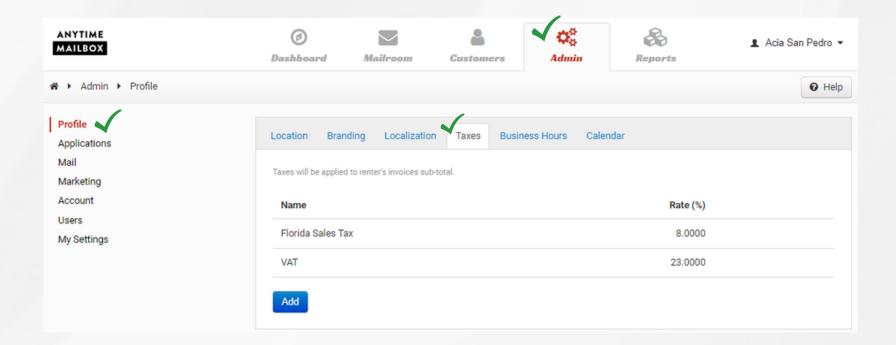
ANYTIME MAILBOX

Profile - Taxes

The next tab is '*Taxes*'. This is a handy spot where you can *add any type of taxes* that need to be included on a renter's invoice or monthly bill.

The amount of tax you add here will be **deducted from the renter's invoice as** a whole and charged when collecting their monthly balance.

It's important to note that charging renters any type of tax is your location's responsibility, so make sure to add it here if needed.

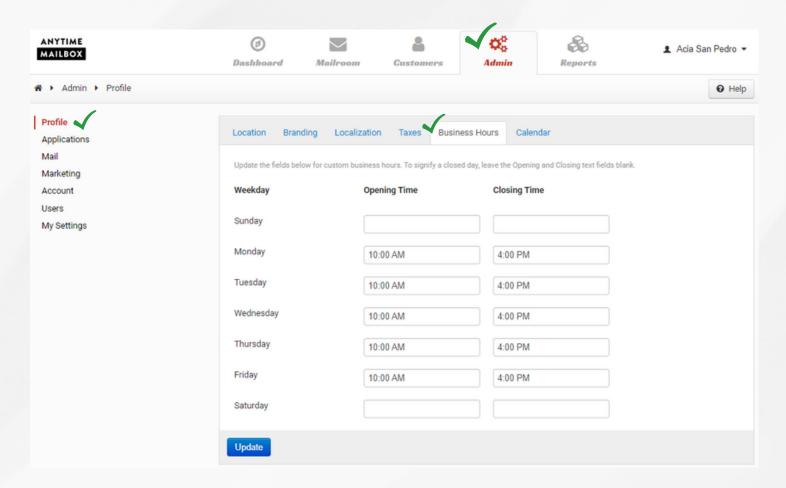




Profile - Business Hours

The next tab is 'Business Hours', and it's a great spot to edit and update your location's specific hours of business at any time.

This information is important for your renters as it's provided to them when they are making a request to pick up mail items from your location.



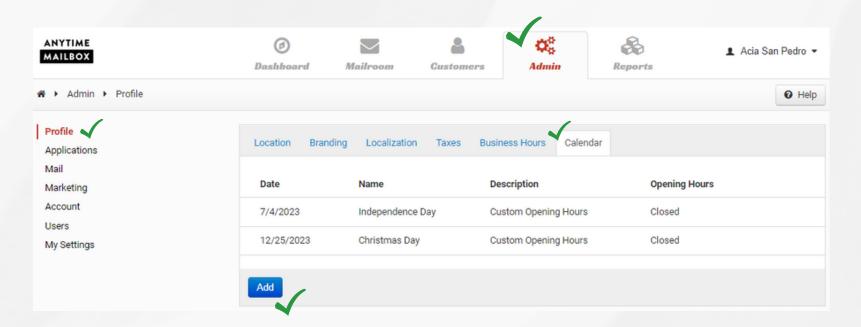
ANYTIME MAILBOX

Profile - Calender

'The next tab is 'Calendar'. This is where you can add dates when your location won't be in operation.

This information is important for your renters as it's provided to them when they are making a request to pick up mail items from your location.

Simply click on 'Add' to add the dates as needed.





What's next?

Admin Settings: Applications





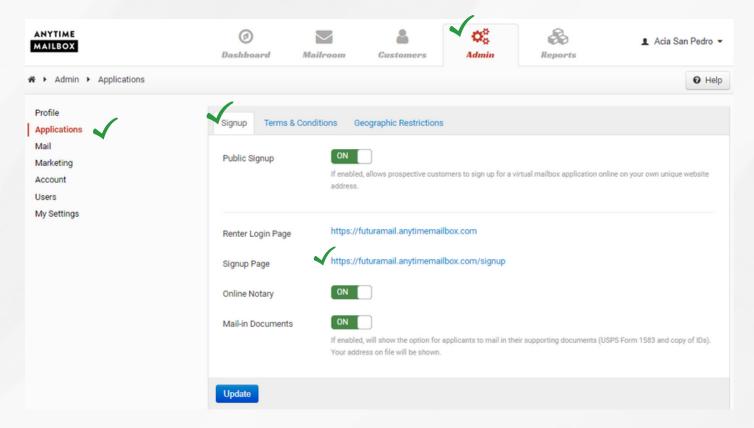
Application Settings - Signup

'The next subtab under '**Admin**' is called '**Applications**', and the first section you'll see is '**Signup**'.

Here, you can find the signup **URL for your location that you can use to source** renters.

It's a super easy way to connect with potential renters, so don't forget to put it on your location's website to promote that you offer virtual mailbox services.

Any potential renters can sign up for your location right from that URL





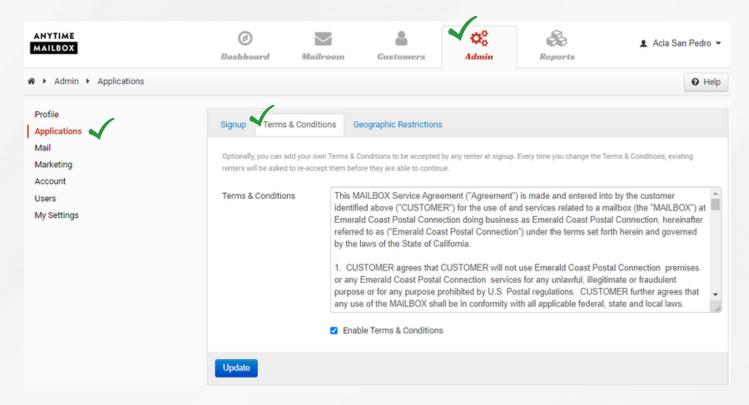
Application Settings - Terms & Conditions

'The next tab is 'Terms & Conditions'.

These are really important because all of your renters need to read and agree to them the first time they access their mailbox account after signing up.

It's crucial to keep them up-to-date with the latest policies and procedures at your location.

One thing to keep in mind is that **every time you update the terms and conditions, your renters will need to re-read and agree to them again** when they next log in.



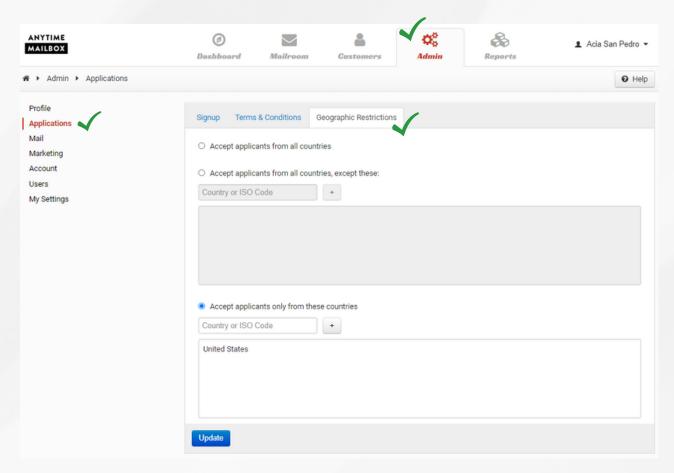


Application Settings - Geographic Restrictions

'The next tab is 'Geographic Restrictions'.

This is an awesome feature that lets you **customize access to your services based on location**.

For example: If you state that you would **only accept applicants from the USA**, **anyone based in another country will <u>NOT</u> be able to sign up for your location**.





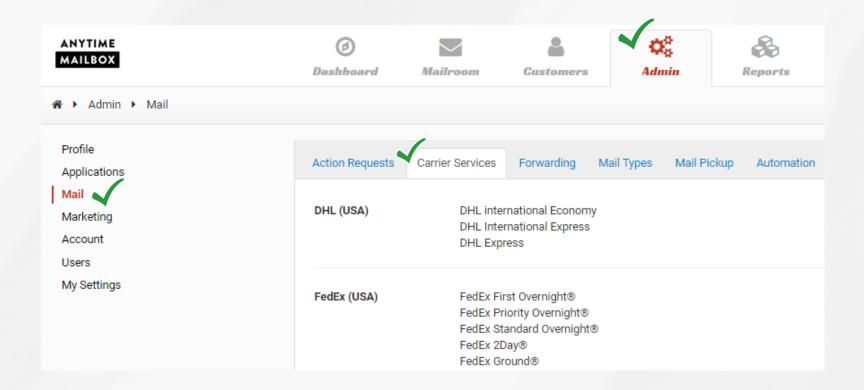
What's next? Admin Settings: Mail





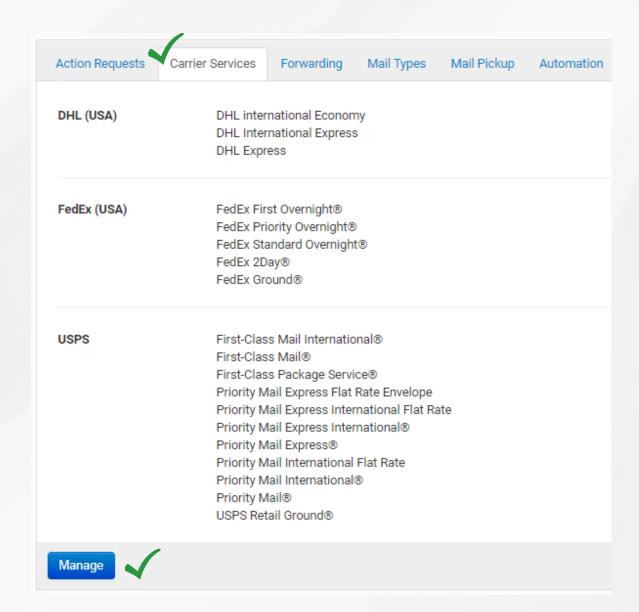
It is important to clarify **which shipping and delivery services your location supports.**

You can add these is the next tab, 'Mail' and then select 'Carrier Services'.

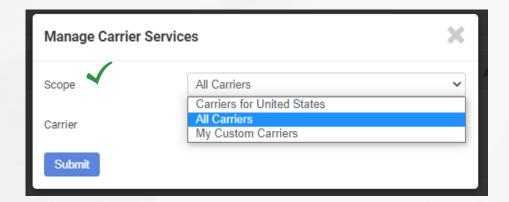


In the 'Carrier'
Services' tab, you can easily add/change the shipping services used/supported at your location.

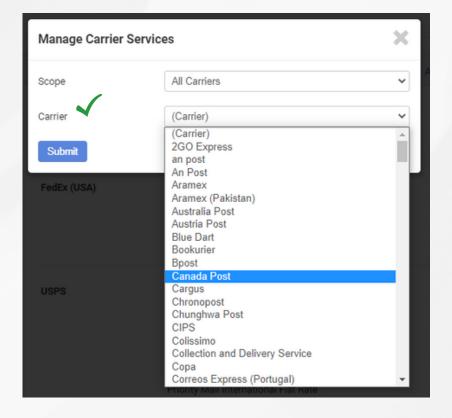
All you need to do is click on the **blue** '**Manage**' button.



After clicking '*Manage*', you can then use the first dropdown to *filter the Scope for which* carriers you are looking to add.



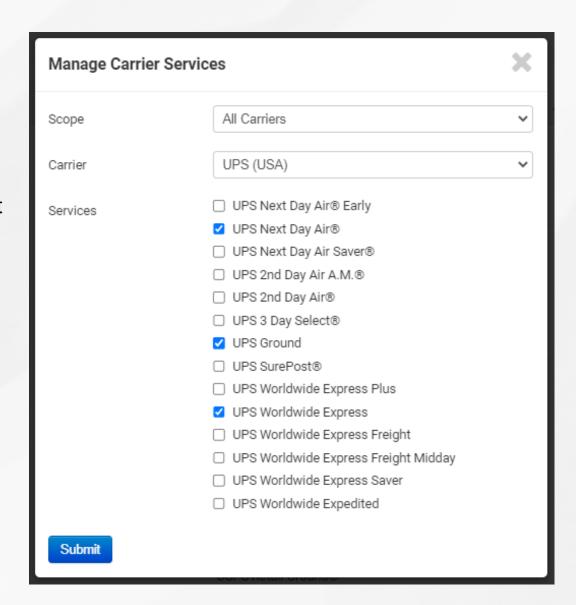
Then, you can use the 'Carrier' drop-down to then select the shipping carrier you offer at your location.



After you have chosen your preferred carrier, a list of all the available services will be displayed underneath.

To select the services that you offer, simply click the box to the left of each service, and a blue checkmark will appear.

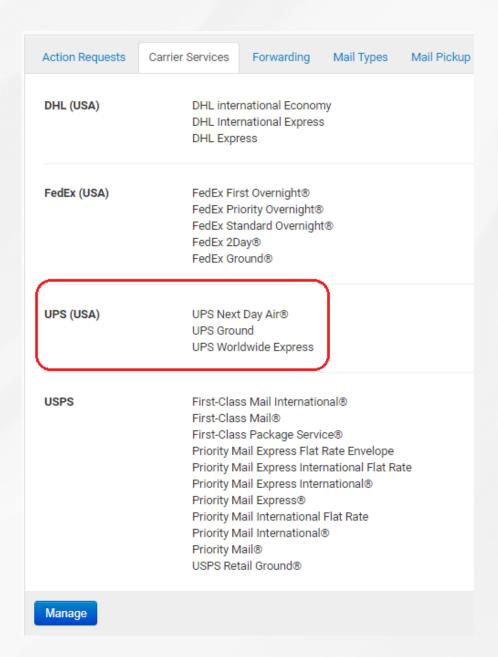
Once you have selected all the services you offer under that particular carrier, just click the *blue* '*Submit*' button to save the changes.





After clicking 'Submit', you will be taken back to the main carrier services page where you will now see that carrier listed.

These can be edited & changed at any time.

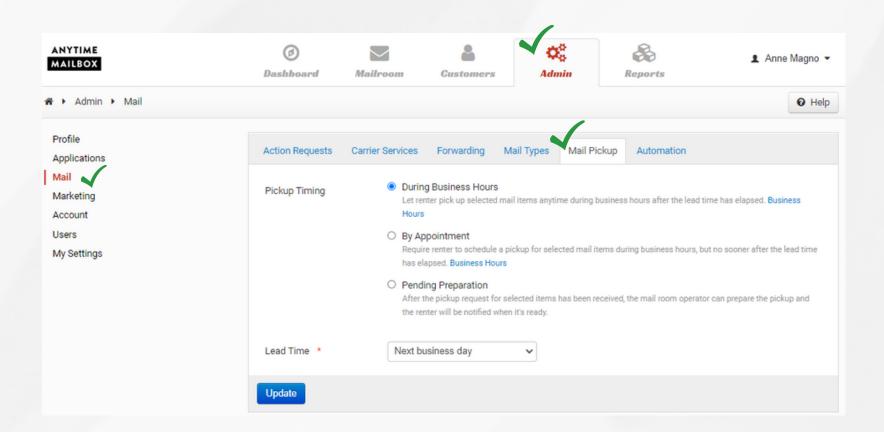




Mail Settings - Pickup

Another important section of the 'Mail' tab is 'Mail Pickup'.

Here you can customize how renters make requests to collect their mail items from your location.



ANYTIME MAILBOX

Mail Settings - Pickup

We offer *three different types of local pick-up options to choose from*, depending on your preferences and how you would like to make them available at your location.

- By appointment only
- Pending preparation
- Ouring business hours

To make things easier for renters, we've made it possible for them to select the local pick-up option that your location has set up directly in the portal.



ANYTIME MAILBOX

Mail Settings - Pickup

Here is a more detailed breakdown of what those pickup options mean:

During Business Hours

- Select this option for your renter, if you have staff during your business hours or if you want renters to pick up their mail anytime during business hours after you set the **Lead Time**.
- For example, if you select this option and you set the Lead Time at 2 business days, the renter requested to pick up mail on a Monday, the renter should come to the store on Wednesday.

By Appointment

 Select this option if you want more control over your pick-up schedule. The renter can set an appointment with you to pick up their mail.

Pending Preparation

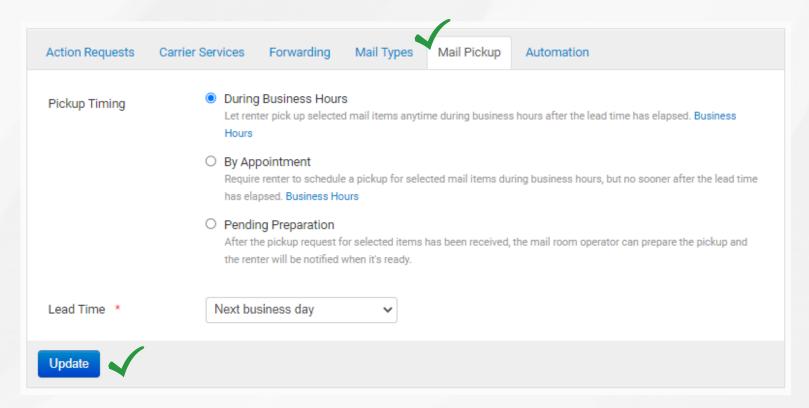
 Select this option if you want the renter to know when their mail item is ready to be picked up.



Mail Settings - Pickup

To **review or edit** your locations pickup preferences, simply log into your dashboard & select '**Admin**', then select '**Mail**' on the left side and click on the '**Mail Pickup**' tab.

From here, you can select which pickup type you would like & then click the **blue** '**Update**' button to save any changes.





What's next? Admin Settings: Account

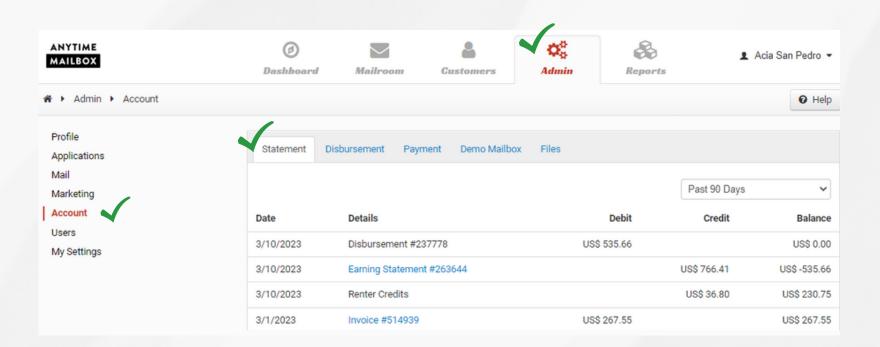


ANYTIME MAILBOX

Account Settings - Statement

The next tab that is very important is the 'Accounts' tab.

From there, the first tab you will see is the '**Statement**' tab, where you can see a breakdown of your billing.





Account Settings - Disbursement

At Anytime Mailbox, our goal is to ensure that you **get paid correctly each month**.

It is really important that you have an account added in the next tab which is 'Disbursement'

You can review & change/update this information at any time.

In this tab, you can easily view and manage your disbursement account details, ensuring that everything is accurate and up-to-date.

Statement Disburseme	ent Payment	Demo Mailbox	Files
Account Type *	Business Che	ecking ~	•]
Routing Number *			
Account Number *			
Legal name and address of US	S bank account owner		
Account Owner * 0			
Address Line 1 *			
Address Line 2			
City *			
State *	(State)	~	•]
Zip *			
Country *	United States	· ·	
Update			

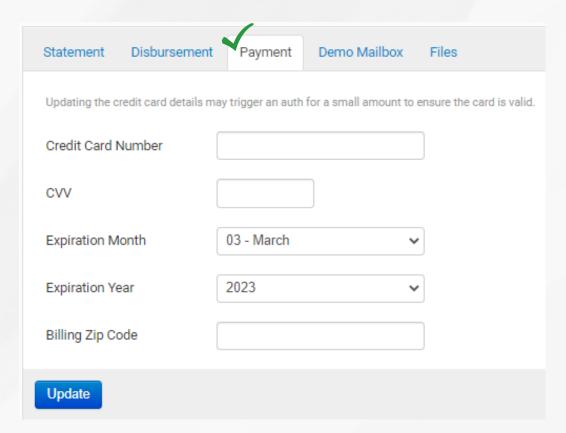


Account Settings - Payment

As part of our billing procedure, it is necessary to have a **method of payment on file** for your location.

This is solely for use if fees are owed to Anytime Mailbox and we are required to physically collect payment from you.

You can add a method of payment under the '**Payment**' tab. This can be change/updated at any time.





Account Settings - Demo Mailbox

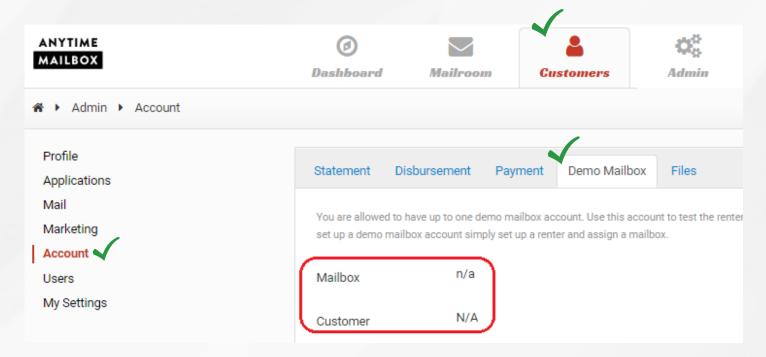
The next tab in 'Account' is 'Demo Mailbox'.

Every location is allowed one Demo Renter Account to test the Renter experience.

Setting up this Demo Mailbox follows the same process as adding a Renter to the platform manually.

Note that payment info is not needed for this account.

When viewing this tab, if you already have a demo mailbox set up it will show here, if not, it will show as N/A.

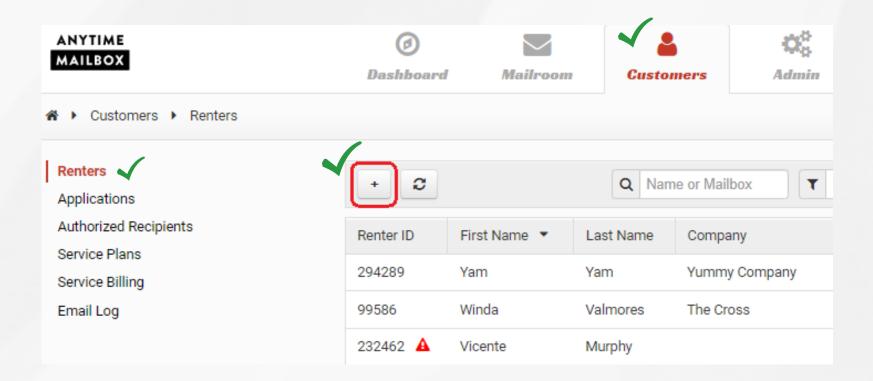




If you haven't set up a demo mailbox yet, the first step is to create a renter account in the system.

To do this, simply click on the '*Customers*' tab and you'll be taken to the '*Renters*' section, where you'll see a list of your current renters.

From there, just click on the '+' sign to create a new renter account.





Once you click on the '+' icon, you'll be taken to a form where you can *fill out the necessary information for your renter account*.

Since this is just a Demo Mailbox account, please keep in mind that the information you add doesn't need to be real.

However, we recommend that you use an active email address as this will be the login credential for your demo mailbox once it's been set up.

After you've filled out all the required details, just hit the **blue** '**Add**' button and your renter account will be created.

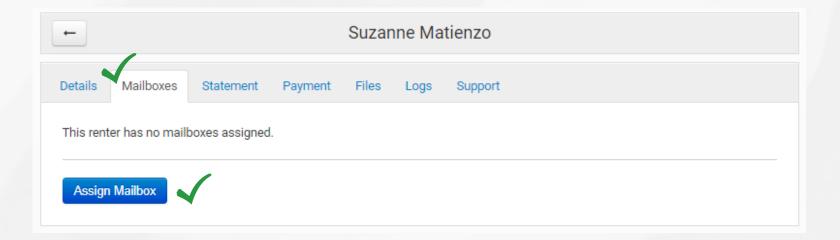
-	Add Renter
Details	
Country *	United States 🗸
Company	
First Name *	
Last Name *	
Address Line 1 *	
Address Line 2	
City *	
State *	(State)
Zip *	
Email *	
Phone *	+1 🔻
Active	ON
	Send Account Creation Email to Renter
Add	



Now that you've **successfully created your renter account**, you can proceed to the next step by clicking on the '**Mailboxes**' subtab.

From there, you can assign your demo mailbox.

Simply click on the **blue** 'Assign Mailbox' button to get started.





After you click on '**Assign Mailbox**', you'll be presented with options to assign the mailbox to your renter account.

The first option is the *Billing Type*, and for this, you'll want to select '*No Charge Demo Mailbox*' from the drop-down menu.

This will ensure that you're not charged for the demo mailbox.





Once you've selected '**No Charge Demo Mailbox**', you can then proceed to fill out the rest of the mailbox assignment information.

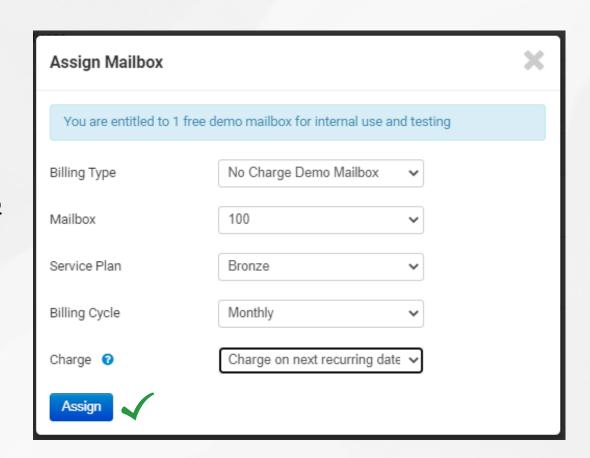
This includes selecting the mailbox number, service plan, and billing cycle.

For the *Billing Cycle*, the only option that should be presented is '*Charge*'.

on Next Recurring Date'.

Just a friendly reminder that since this is a demo mailbox, there won't be any charge incurred for this mailbox assignment.

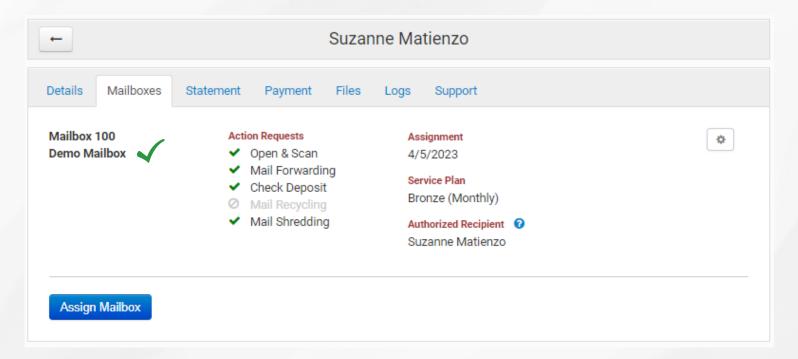
Once you have filled in the information, click on the **blue** '**Assign**' button to assign the mailbox.





Account Settings - Viewing your Demo Mailbox

Once the mailbox has been assigned, when viewing the 'mailbox' tab of your renter account it will show as a **Demo Mailbox**.





Account Settings - Log into your Demo Mailbox

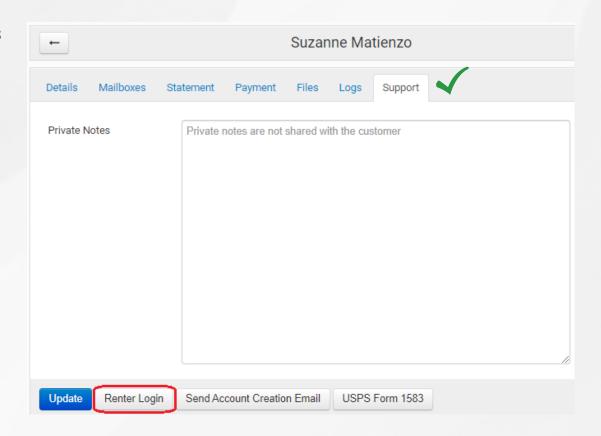
Once your mailbox has been set up, you can log in to the Demo Renter Account to manage it, just as you would if you were a renter.

This gives you the chance to test out the renter experience and **practice** completing action requests, so you'll feel confident when actual renter requests come in.

You can even assign mail to yourself to get a feel for the process.

The first way to log in is when viewing your renter account, click on the subtab 'Support'.

At the bottom, you will see the option for 'Renter Login'.





Account Settings - Log into your Demo Mailbox

Another way to log in is by using a separate browser and **going to our website** at www.anytimemailbox.com, and clicking 'Log In'.

You'll need to use the email address associated with your renter account, as well as the password you created.

If you happen to forget your password, don't worry, you can easily reset it using the 'Forgot Password' option.

User Login	
Email 	
Password	
Log In	Forgot Password?



What's next? Admin Settings: Users



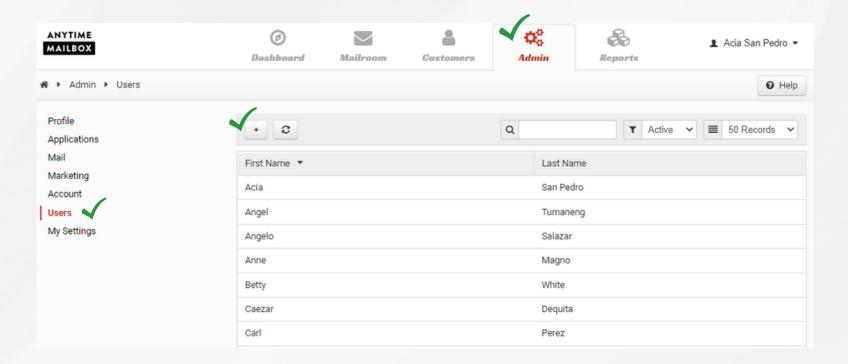
Users - Adding Users

The next highly useful subtab under 'Admin', is 'Users'.

This section allows you to easily *manage user logins for your employees and* staff at your location.

It's a great way to streamline your user management and ensure that your team has easy access to the tools they need.

Adding a new user is really simple - all you need to do is click on the + icon.



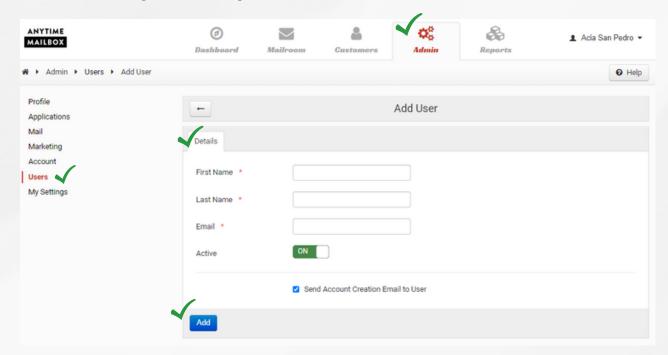


Users - Adding Users

Once you've clicked on the + icon under the 'Users' tab, you'll be prompted to input the new user's first and last name, as well as the email address that they will use to log in.

It's important to note that **only one email address can be used per user**, so please avoid using an email that another user is already using to log in to the platform.

Once you've entered the required information, simply click on the <u>blue</u> '<u>Add</u>' button and the <u>new user will receive an email with instructions on how to create</u> their password and log in to the platform.



Users - Privileges

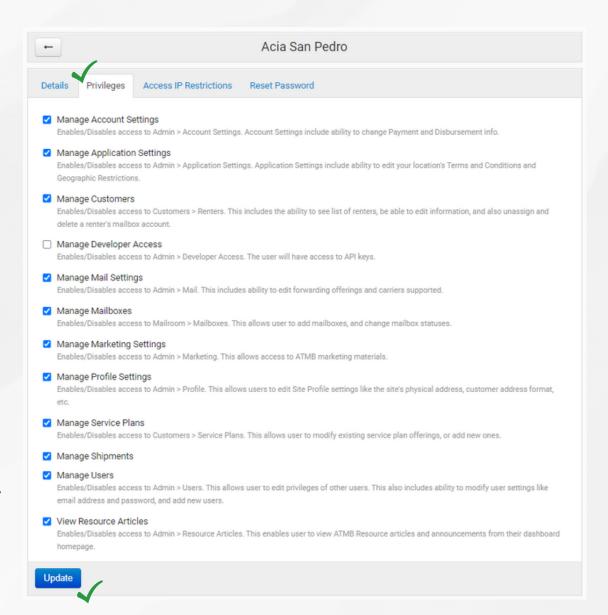
Another useful feature within the 'Users' tab - the ability to manage each user's access and permissions within the dashboard.

Just *click on a user* when viewing your list of users and navigate to the '*Privileges*' tab.

From here, you can uncheck anything that you don't want certain employees to have access to.

It's a great way to tailor each user's experience to their specific role within your organization.

And remember, if you make any changes to these privileges, just be sure to click on the blue 'Update' button to save your changes



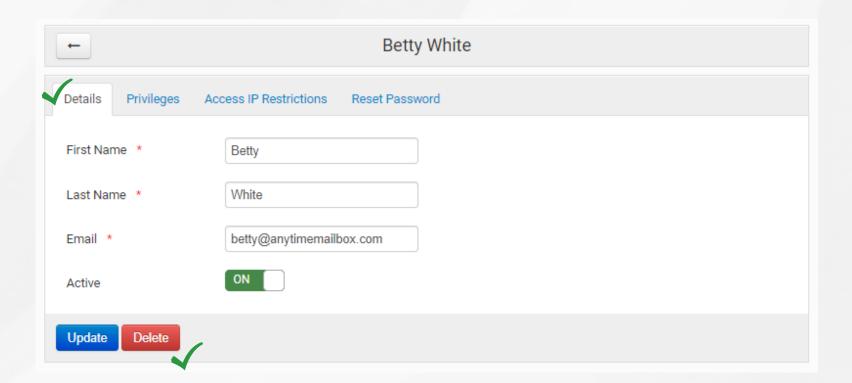


Users - Removing Users

To **remove a user** from your list, **simply select their name while viewing the user list**, and you'll be taken to the '**Details**' tab.

From there, you can click on the 'Delete' button in red to remove the user.

Once the user has been removed, their login credentials will no longer be valid, and they won't be able to access the dashboard anymore.





What's next?

Admin Settings: My Settings





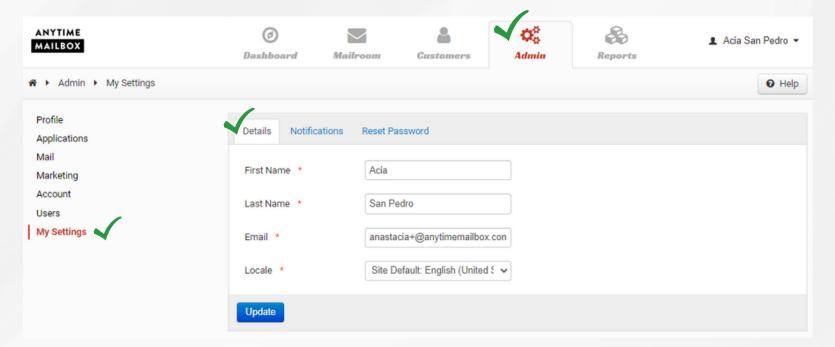
My Settings - Details

The next subtab under 'Admin' is called 'My settings'.

The first subtab you'll see within this section is called '**Details**', where you can easily **update your login information such as your email address**.

Feel free to make any necessary changes to ensure your account remains up-to-date.

And remember, if you make any changes, just be sure to click on the **blue** '**Update**' button to save your changes





My Settings - Notifications

Next up is the 'Notifications' tab, which allows you to customize the notifications you receive from the virtual mailbox platform.

To make changes, simply select the relevant checkmarks next to the notifications you want to receive, and uncheck any that you don't want to receive.

And remember, if you make any changes, just be sure to click on the **blue** '**Update**' button to save your changes.

Please be aware that not all notifications are listed in this section, as some important notifications, such as forwarding requests, are automatically sent to you by default.

These notifications are crucial to ensure a smooth virtual mail experience for the renters, and as such, they cannot be disabled.

Details Notifications Reset Password Renter Account Closure Request ? Operator Renter Account Closure ? Operator Mailbox application from ATMB (Auth Only) Mailbox application from ATMB (Assign On Signup) Mailbox application from Direct (Auth Only) Mailbox application from Direct (Assign On Signup) Mailbox application file received Mailbox application under review Mailbox application approval Renter action request Renter invoices created Renter payment received Renter charge summary (For non-ATMB merchant accounts only) Disbursement sent Update



What's next? Mailboxes



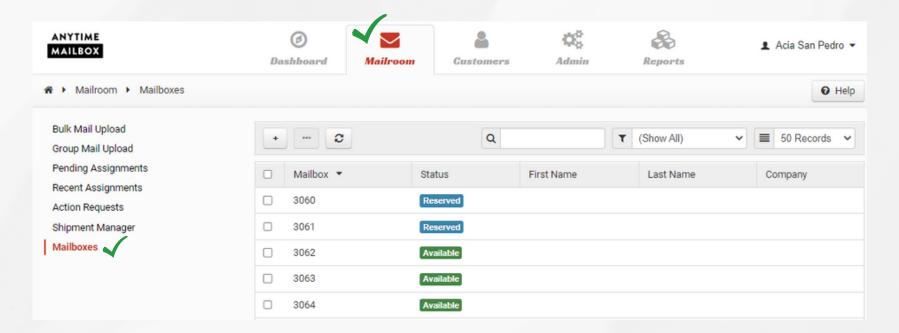
Mailboxes



To assign a mailbox to a renter, you'll first need to set up your mailboxes.

This is a quick and easy step that's usually done just once at the beginning, but don't worry - you can always add more mailboxes later if needed.

To get started, simply head to the '*Mailroom*' tab and click on the '*Mailboxes*' subtab to view your mailboxes.



Mailboxes - Adding Mailboxes

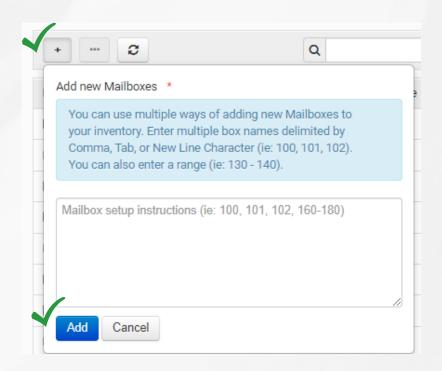
To add mailboxes, simply click on the '+' icon.

Then, enter the range of mailboxes to be created.

The range parameters can be individual boxes separated by commas or a range such as 100-200.

You can also use alphanumeric mailboxes such as 101A or V300.

Once you have input the mailboxes to be created, simply click on the **blue 'Add'** button



Mailboxes - Mailbox Statuses

There are 3 different statuses that your mailboxes can be set as:

Available, Reserved, and Assigned

- Available mailboxes
 - Only you can see Available mailboxes and they can be used by you to manually enter a renter into the platform.
- Reserved mailboxes
 - These are available boxes that can be picked by the renter while ordering a digital mailbox on our website OR via your direct URL
- 3 Assigned mailboxes
 - Are any mailboxes that currently have an assigned renter

You can see the status of a mailbox inside the "Mailboxes' tab

Mailbox ▼	Status	First Name	Last Name	Company
3060	Assigned	Todd	Kinneston	
3061	Reserved			
3062	Available			

Mailboxes - How to Reserve Mailboxes

It is extremely important to have several mailboxes set to 'Reserved'.

This is a crucial step in ensuring that your location is visible and accessible to renters who sign up online through our website.

Without any reserved mailboxes, potential renters won't be able to sign up for your location and it may result in your location being removed from our website.

We highly encourage you to keep your mailboxes reserved to make sure your location stays visible and accessible to renters.

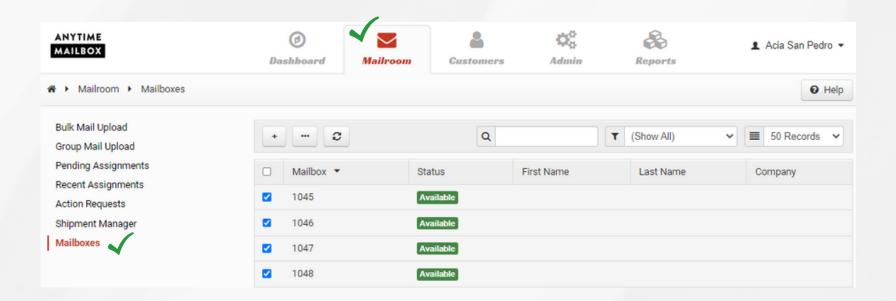


Mailboxes - How to Reserve Mailboxes

Reserving mailboxes inside your dashboard is quick and easy!

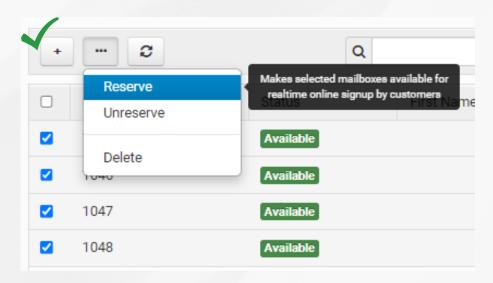
To get started, simply click on the '*Mailroom*' tab and then select the '*Mailboxes*' subtab.

From there, you can select the mailboxes you want to reserve by clicking on the small square to the left of the mailbox number, to checkmark them.



Mailboxes - How to Reserve Mailboxes

Once you've made your selections, **just click on the three dots icon '...' and select 'Reserve'**.



It is always safer to reserve too many mailboxes for online signup than not enough!

We recommend that you keep a minimum of 100 reserved mailboxes available at all times, so you can always be sure you'll cover new renters.

There is no charge for reserving mailboxes, and you can reserve as many as you want, so you literally have nothing to lose!



What's next? Service Plans



What is a Service Plan?

A Service Plan is a price plan/package that your renters can sign up for to access virtual mail services at your location.

You can choose the types of Service Plans & inclusions that you would like to offer at your location.

These plans will be advertised on our website and your direct URL for potential renters to choose from.

Here is a screenshot example of some Service Plans advertised for potential renters:

Bronze				
US\$ 9.99 / month	US\$ 109.99 / year			
Incoming Mail	30 / month			
Open & Scan	5 pages / month			
Forwarding	Each shipping bundle at US\$ 5.00			
Recipients	1			

Silver		
US\$ 14.99 / month	US\$ 164.99 / year SELECT	
Incoming Mail	60 / month	
Open & Scan	10 pages / month	
Forwarding	Each shipping bundle at US\$ 5.00	
Recipients	2	

What is a Service Plan?

Service plans are completely customizable to suit your specific mailbox location.

Whether you prefer a monthly or annual rental, there is a range of options within the service plans that can be tailored to your locations preferences.

<u>Service plans can contain the following offerings to your renters:</u>

- Incoming Mail Items
- Open & Scan Requests
- Forward Requests
- Check Deposit Requests
- Pickup Requests
- Recycle Requests
- Shred Requests
- Authorized Recipients
- Storage

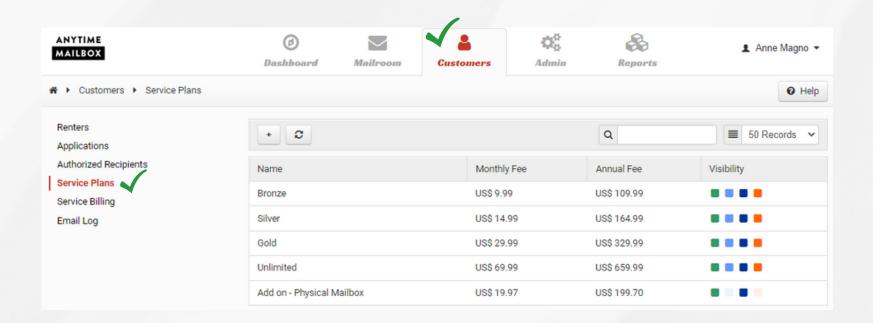




How to View Your Service Plans

Your location's Service Plans will have already been discussed in detail and set up with you and our Sales team before launch.

However, if you would like to *view your current service plan offerings*, simply click on the '*Customers*' tab & on the left side and select the option for '*Service Plans*'.

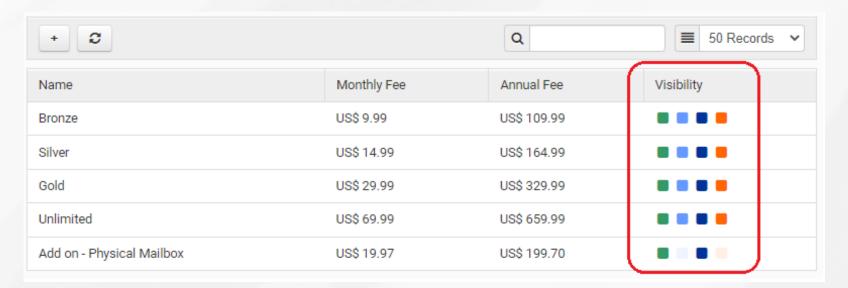




Service Plan Visibility

For each service plan, you can set the Visibility of it.

This means, where the service plan is advertisted to your potential renters.



Internal
 Operator Branded Signup URL for New Customers
 Operator Branded Signup URL for Existing Customers
 Anytime Mailbox Lead Generation Website

Where the service plan is visible is **color coded**.

Which colors are shown to the right of the service plan is where it is visible

Service Plan Visibility



Service Plan Visibility Explained

Internal: Having this selected makes this plan visible to all employees that sign in to the Anytime Mailbox platform - No potential renters can see the plan if it is set to internal.

Operator Branded Signup URL for New Customers: When signing up through your direct signup URL, renters can select if they are new customers to your business. Having this selected will show the following Service Plan to new customers.

Operator Branded Signup URL for Existing Customers: When signing up through your custom signup URL, your existing physical mailbox renters at your location can see the following Service Plans.

Anytime Mailbox Lead Generation Website: Having this selected makes this plan visible on the Anytime Mailbox website for new renters to sign up.

- Internal
- Operator Branded Signup URL for New Customers
- Operator Branded Signup URL for Existing Customers
- Anytime Mailbox Lead Generation Website

Where the service plan is visible is *color coded*.

Which colors are shown to the right of the service plan is where it is visible

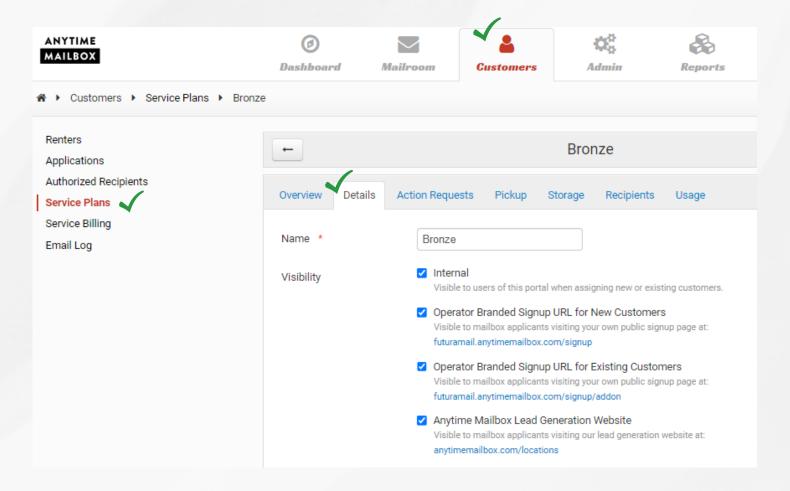


Changing Service Plan Visibility

You have the ability to change the service plan visibility whenever you like.

It's simple - just click on the 'Customers' tab, and select 'Service Plans'.

From there, **select the service plan that you'd like to modify**, and then click on the '**Details**' subtab.



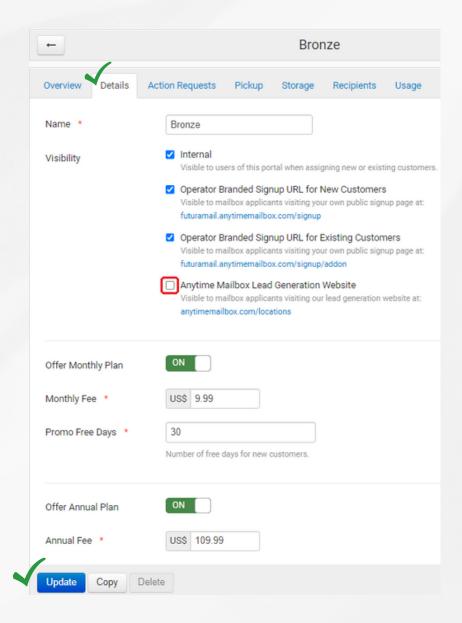
Changing Service Plan Visibility

In the '**Details**' tab, you'll see a section labeled '**Visibility**' where you can customize which service plans your renters can see.

You'll notice that any **service plans currently visible** will have a **blue** checkmark next to them.

To remove visibility for a particular service plan, simply click on the checkmark to unselect it.

When you're finished making your changes, be sure to click the *blue* '*Update*' button at the bottom to save your changes.



Making Changes to your Service Plans

We understand that you may want to *update your service plan offerings*, such as adjusting the monthly pricing.

To ensure a smooth transition and avoid any complaints or confusion from your renters, we recommend contacting us at least 30 days in advance of the planned changes.

Our team will work with you to make the necessary updates and ensure your renters are informed of the changes in a timely manner.

Store Closure Process

Sometimes, things happen that can affect the availability of your mail room for your renters. You may be moving your location, going out of commission for a short time, or simply closing your location entirely.

The moment you find out of possible closure, move, remodeling, or anything that can affect the availability of your location for your Anytime Mailbox customers, you are required to contact us immediately.

As per the terms of your partnership with Anytime Mailbox, you are required to give us 30 days' notice of the closure.

For more information on the terms of service, you can review our website: www.anytimemailbox.com/terms-operator

Please contact us of your closure in writing at service@anytimemailbox.com.

Store Closure Process

Terms & Conditions for Mail Center Operators

2.1 Termination by Operator. Operator may terminate this Agreement at any time by providing ATMB with at least 30 days' prior written notice of termination; Operator understands that ATMB requires not less than 30 days' prior notice of termination in order to allow for the transition of Renters to another Mail Center Operator, and Operator acknowledges that ATMB and its Renters will be immediately and materially harmed by any termination of this Agreement by Operator on less than 30 days' prior notice. In addition, notwithstanding the timing of any notice to terminate by Operator hereunder, termination of this Agreement will not be final until Operator has, to ATMB's satisfaction, confirmed Operator's intent to terminate the account, as well as the identity and authorization of Operator's representative who is requesting the termination. Once ATMB notifies Operator of termination or otherwise approves Operator's notice of termination (including, without limitation, by indicating such termination within or using such means as may be available from the Services), Operator's account will go into "Closed" status. Operator will no longer incur periodic charges once its account is in "Closed" status. In the event that Operator should attempt to terminate this Agreement on less than 30 days' prior notice, then in addition to any and all other amounts that may be due to ATMB hereunder upon such termination (including, without limitation and for the avoidance of doubt, any Early Terminated Mailbox Fees or other Miscellaneous Charges, as such terms are defined in Section 3.2 below, that may be or become payable as a result of the timing of Operator's termination), Operator will be obligated to pay ATMB, as liquidated damages and not as a penalty, a \$5,000 early termination fee, which ATMB will charge to Operator in accordance with Section 3 below.

Test Your Knowledge



- 1. Where would you go within your dashboard to add taxes to be charged to your renters?
- 2. How do you add a user to your operator account?
- 3. Where would you go within your dashboard to update your location's renter terms & conditions?
- 4. True or False There is an option for you to set Geographic Restrictions on your application audience.
- 5. Where would you go within the dashboard to view your service plans?
- 6. True or False: You need to reserve mailboxes for online signup
- 7. Where would you go within your dashboard to update your notification preferences?



Contact



If you have any questions or concerns, please do not hesitate to contact us on the following channels:

Phone: +1-833-677-2862

Email: service@anytimemailbox.com

Live Chat: www.anytimemailbox.com

Here are some useful links to help you:

FAQ: anytimemailbox.com/mail-center/faq

Knowledge Base: service.anytimemailbox.com/en/support/home