

Operator Training

Part 2: Admin Settings

**ANYTIME
MAILBOX**

| Training Agenda

- **Introduction**
- **Profile Settings**
- **Application Settings**
- **Marketing Tools**
- **Users**
- **Personalizing 'My Settings'**
- **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 second deck in our 5-part series, which focuses on admin set up. In this series, we provide a complete walk-through on how to set up your additional settings in your profile. Even if you have been a long-time operator with us, we recommend reviewing this deck to ensure that you have checked all your admin 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!

**ANYTIME
MAILBOX**

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.

Here you will see your location's address.

Please note that this information has already been set up for you at the beginning of your partnership with us. Please do NOT update this information without contacting us & your renters first.

The screenshot shows the ANYTIME MAILBOX Admin interface. The top navigation bar includes links for Dashboard, Mailroom, Customers, Admin (selected with a green checkmark), and Reports. The left sidebar shows the Profile section (selected with a green checkmark) with sub-items: Applications, Mail, Marketing, Account, Users, and My Settings. The main content area displays the Location subtab (also selected with a green checkmark) with the following form fields:

Location	Branding	Localization	Taxes	Business Hours	Calendar
Country *	United States				
Company *	Futura Mail & Co				
Address Line 1 *	Silverhill St				
Address Line 2	Suite 202				
City *	SCHENECTADY				
State *	New York				
Zip *	12345				

| 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.

The screenshot displays the ANYTIME MAILBOX Admin interface. The top navigation bar includes links for Dashboard, Mailroom, Customers, Admin (highlighted with a green checkmark), and Reports. The user is logged in as Acia San Pedro. The left sidebar shows the Profile subtab (highlighted with a green checkmark) and other settings like Applications, Mail, Marketing, Account, Users, and My Settings. The main content area is the Branding subtab, which contains the following fields and options:

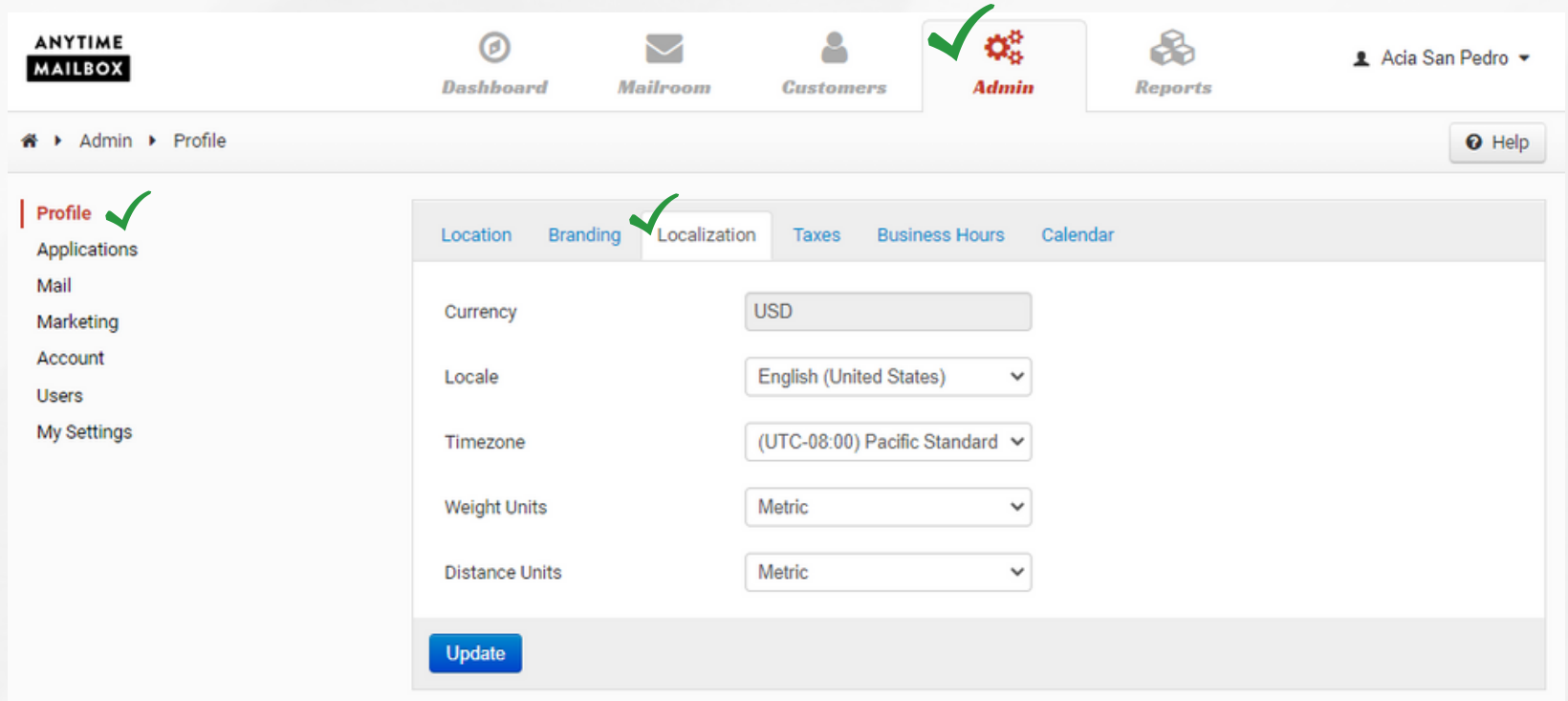
- Title ***: Futura Mail
- Custom URL ***: futuramail .anytimemailbox.com
- Logo**: A section for uploading a company logo, featuring a preview of the ANYTIME MAILBOX logo and buttons for Upload and Remove Logo.

At the bottom of the Branding subtab is a blue **Update** button.

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

Dashboard Mailroom Customers **Admin** Reports

Acia San Pedro

Admin Profile Help

Profile ✓

Applications

Mail

Marketing

Account

Users

My Settings

Location Branding **Localization** Taxes Business Hours Calendar

Currency USD

Locale English (United States) ▼

Timezone (UTC-08:00) Pacific Standard ▼

Weight Units Metric ▼

Distance Units Metric ▼

Update

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.

ANYTIME MAILBOX

Dashboard

Mailroom

Customers

Admin

Reports

Acia San Pedro

Admin

Profile

Help

Profile

Applications

Mail

Marketing

Account

Users

My Settings

Location

Branding

Localization

Taxes

Business Hours

Calendar

Taxes will be applied to renter's invoices sub-total.

Name	Rate (%)
Florida Sales Tax	8.0000
VAT	23.0000

Add

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

Dashboard Mailroom Customers **Admin** Reports

Acia San Pedro

Admin Profile Help

Profile

Applications
Mail
Marketing
Account
Users
My Settings

Location Branding Localization Taxes **Business Hours** Calendar

Update the fields below for custom business hours. To signify a closed day, leave the Opening and Closing text fields blank.

Weekday	Opening Time	Closing Time
Sunday		
Monday	10:00 AM	4:00 PM
Tuesday	10:00 AM	4:00 PM
Wednesday	10:00 AM	4:00 PM
Thursday	10:00 AM	4:00 PM
Friday	10:00 AM	4:00 PM
Saturday		

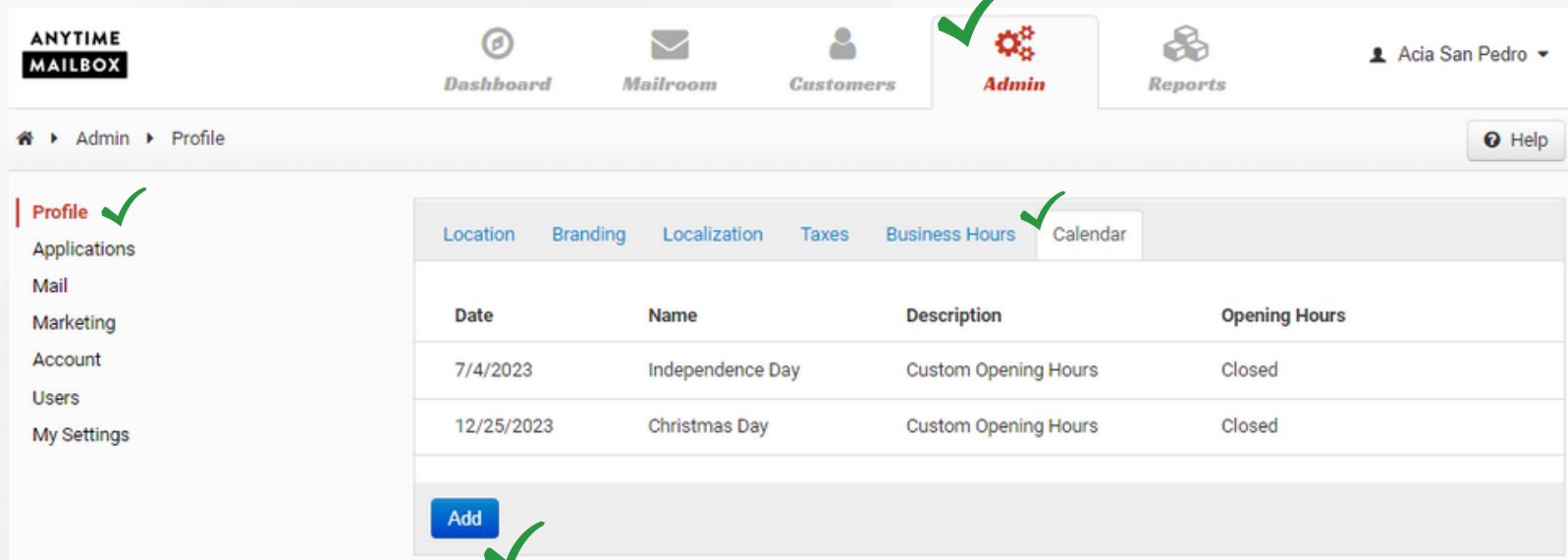
Update

Profile - Calendar

'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.



ANYTIME MAILBOX

Dashboard Mailroom Customers **Admin** Reports

Acia San Pedro ▾

Home ▸ Admin ▸ Profile Help

Profile ✓

Applications

Mail

Marketing

Account

Users

My Settings

Date	Name	Description	Opening Hours
7/4/2023	Independence Day	Custom Opening Hours	Closed
12/25/2023	Christmas Day	Custom Opening Hours	Closed

Add ✓

**ANYTIME
MAILBOX**

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**

ANYTIME MAILBOX

Dashboard Mailroom Customers **Admin** Reports

Acia San Pedro

Admin > Applications

Profile Applications **Mail** Marketing Account Users My Settings

Signup Terms & Conditions Geographic Restrictions

Public Signup ☒ ON
If enabled, allows prospective customers to sign up for a virtual mailbox application online on your own unique website address.

Renter Login Page <https://futuramail.anytimemailbox.com>

Signup Page ☒ <https://futuramail.anytimemailbox.com/signup>

Online Notary ☒ ON

Mail-in Documents ☒ ON
If enabled, will show the option for applicants to mail in their supporting documents (USPS Form 1583 and copy of IDs). Your address on file will be shown.

Update

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.

The screenshot shows the ANYTIME MAILBOX Admin interface. The top navigation bar includes links for Dashboard, Mailroom, Customers, Admin (selected with a green checkmark), and Reports. The user is logged in as Acia San Pedro. The left sidebar shows the Admin menu with Applications (selected with a green checkmark), Profile, Mail, Marketing, Account, Users, and My Settings. The main content area is titled 'Applications' and has three tabs: Signup (selected with a green checkmark), Terms & Conditions, and Geographic Restrictions. The 'Terms & Conditions' tab displays the following text:

Optionally, you can add your own Terms & Conditions to be accepted by any renter at signup. Every time you change the Terms & Conditions, existing renters will be asked to re-accept them before they are able to continue.

Terms & Conditions

This MAILBOX Service Agreement ("Agreement") is made and entered into by the customer identified above ("CUSTOMER") for the use of and services related to a mailbox (the "MAILBOX") at Emerald Coast Postal Connection doing business as Emerald Coast Postal Connection, hereinafter referred to as ("Emerald Coast Postal Connection") under the terms set forth herein and governed by the laws of the State of California.

1. CUSTOMER agrees that CUSTOMER will not use Emerald Coast Postal Connection premises or any Emerald Coast Postal Connection services for any unlawful, illegitimate or fraudulent purpose or for any purpose prohibited by U.S. Postal regulations. CUSTOMER further agrees that any use of the MAILBOX shall be in conformity with all applicable federal, state and local laws.

☒ Enable Terms & Conditions

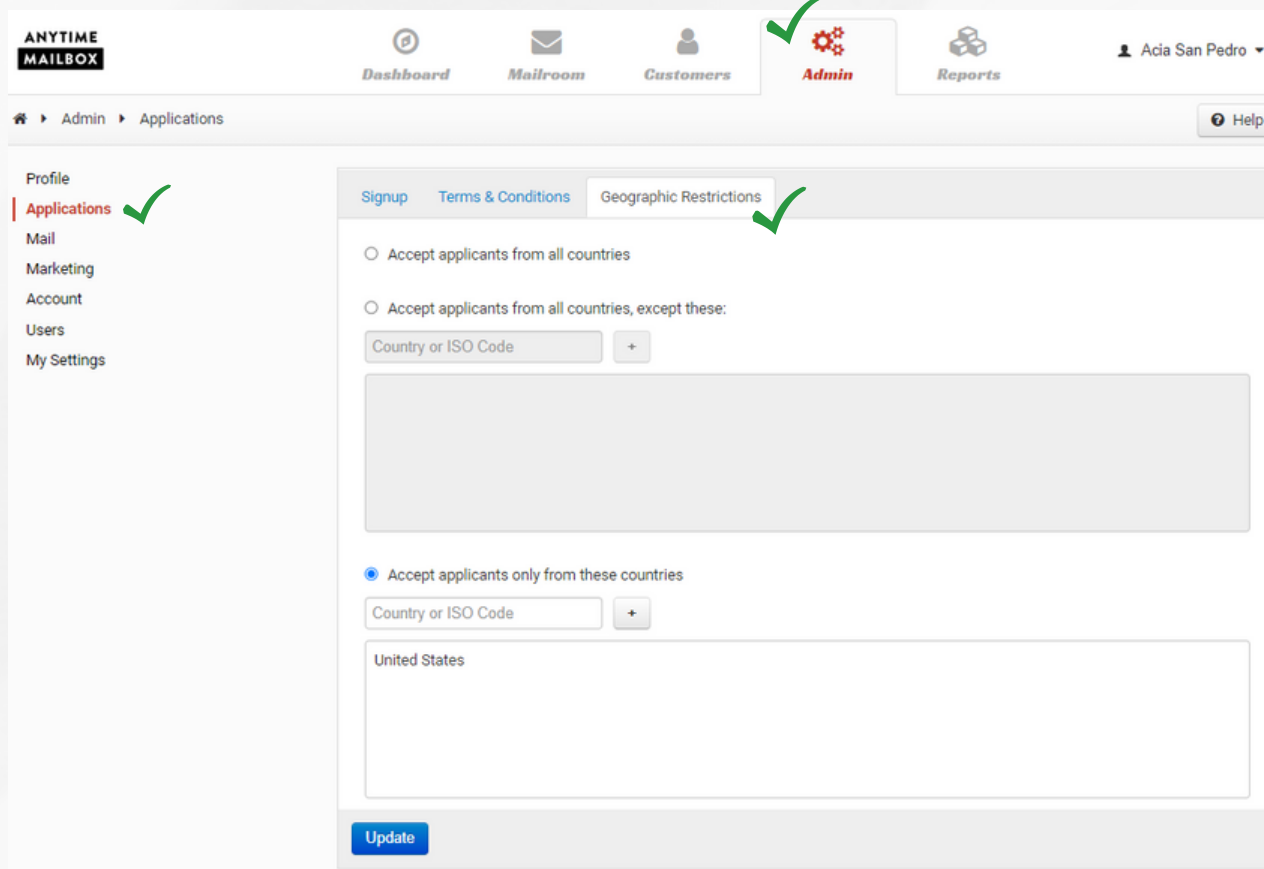
[Update](#)

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 NOT be able to sign up for your location.***



The screenshot displays the ANYTIME MAILBOX Admin interface. At the top, there is a navigation bar with icons for Dashboard, Mailroom, Customers, Admin (highlighted with a green checkmark), and Reports. Below this is a breadcrumb trail: Admin > Applications. On the left side, there is a sidebar menu with options: Profile, Applications (highlighted with a green checkmark), Mail, Marketing, Account, Users, and My Settings. The main content area shows the 'Geographic Restrictions' tab (also highlighted with a green checkmark) under the 'Applications' section. The tab contains two radio button options: 'Accept applicants from all countries' and 'Accept applicants from all countries, except these:'. The second option is selected, and it includes a text input field for 'Country or ISO Code' with a '+' button. Below this, there is a large empty text area. The third option, 'Accept applicants only from these countries', is also visible and selected, with a similar input field and a '+' button. Below this, the text 'United States' is visible in a text area. At the bottom of the form, there is a blue 'Update' button.

**ANYTIME
MAILBOX**

What's next?
Admin Settings: Marketing

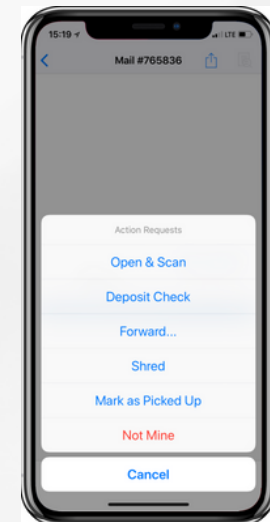
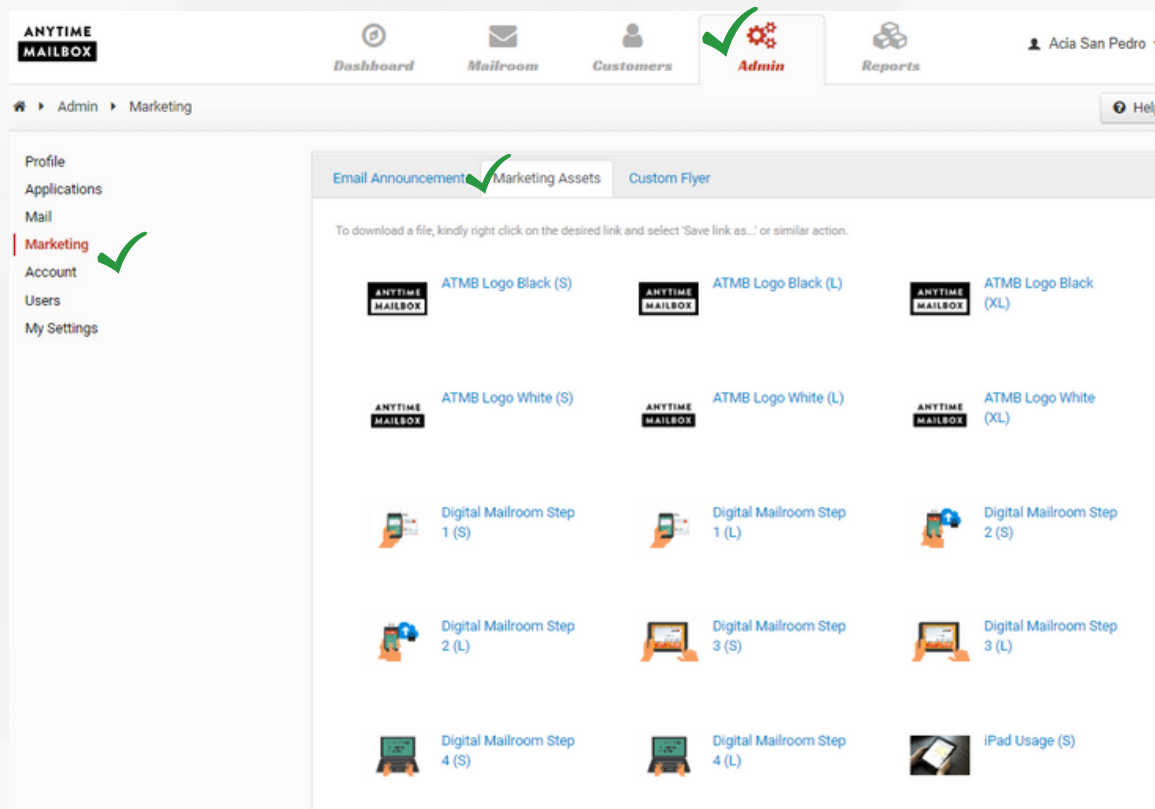


Marketing - Marketing Assets

The next subtab under '**Admin**' is called '**Marketing**', and we have a highly useful section called '**Marketing Assets**'.

This section contains a **selection of photos and logos related to our virtual mailbox service, which you can use on your website or social media when promoting your business.**

It's a great resource that can help add a professional touch to your marketing efforts, so do take advantage of it!

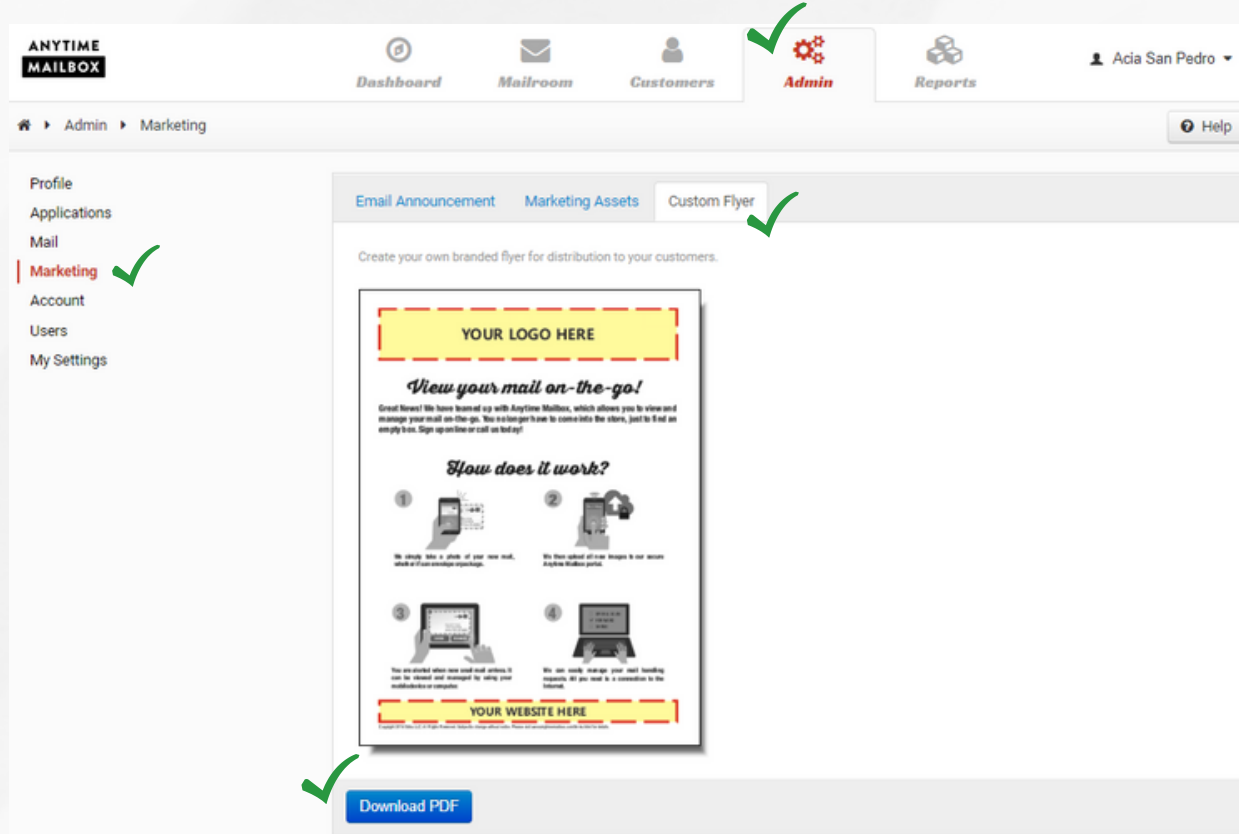


Marketing - Customer Flyer

The next tab is '**Customer Flyer**'. Here, you can **download a PDF of a flyer customized for your location**, which you can use to promote the service.

It's really simple to use - all you have to do is click on the **blue** button labeled '**Download PDF**', and it will **automatically populate with your location's URL and logo**.

It's a great tool to have in your marketing arsenal!



The screenshot displays the Anytime Mailbox Admin interface. At the top, there's a navigation bar with tabs: Dashboard, Mailroom, Customers, Admin (highlighted with a green checkmark), and Reports. Below this, a breadcrumb trail shows 'Admin > Marketing'. On the left sidebar, a menu lists: Profile, Applications, Mail, Marketing (highlighted with a red bar and a green checkmark), Account, Users, and My Settings. The main content area has three sub-tabs: Email Announcement, Marketing Assets, and Custom Flyer (highlighted with a green checkmark). The 'Custom Flyer' tab contains a preview of a flyer with the following text: 'YOUR LOGO HERE', 'View your mail on-the-go!', 'Great News! We have teamed up with Anytime Mailbox, which allows you to view and manage your mail on-the-go. No longer have to come into the store, just to find an empty box. Sign up online or call us today!', 'How does it work?', a four-step process diagram, and 'YOUR WEBSITE HERE'. At the bottom of the preview, there is a blue 'Download PDF' button, which is also highlighted with a green checkmark.

**ANYTIME
MAILBOX**

What's next?
Admin Settings: Users



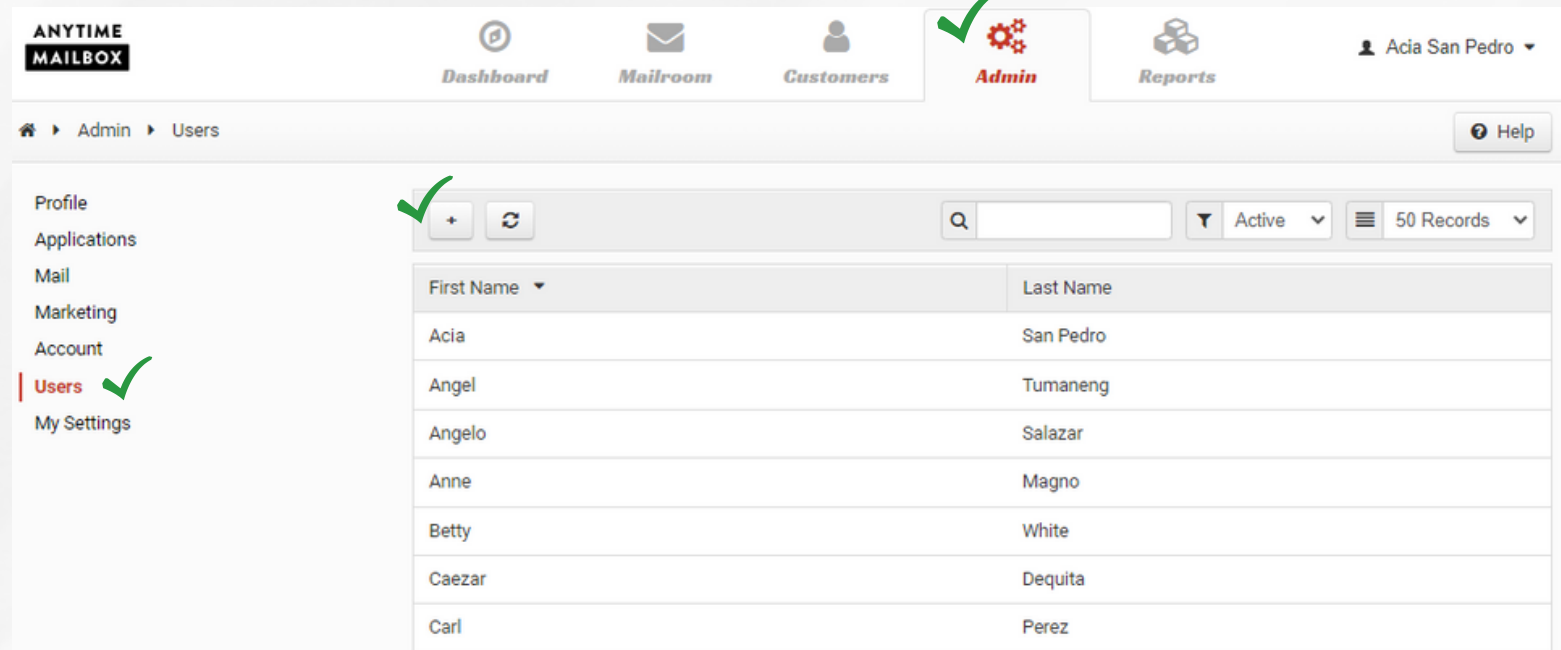
Users - Adding Users

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**.



ANYTIME MAILBOX

Dashboard Mailroom Customers **Admin** Reports

Acia San Pedro

Admin Users Help

Profile Applications Mail Marketing Account **Users** My Settings

+ ↺

Q

Active

50 Records

First Name	Last Name
Acia	San Pedro
Angel	Tumaneng
Angelo	Salazar
Anne	Magno
Betty	White
Caezar	Dequita
Carl	Perez

| 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 **blue 'Add'** button and the ***new user will receive an email with instructions on how to create their password and log in to the platform.***

ANYTIME MAILBOX

Dashboard Mailroom Customers **Admin** Reports

Acia San Pedro ▾

Admin ▸ Users ▸ Add User Help

Profile Applications Mail Marketing Account **Users** My Settings

Add User

Details

First Name *

Last Name *

Email *

Active ☒ ON

☒ Send Account Creation Email to User

Add

| Users - Adding Users

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

The screenshot shows the 'Privileges' tab for a user named 'Acia San Pedro'. The tab is highlighted with a green checkmark. Below the tab are several settings, each with a checkbox and a description. Most checkboxes are checked, but 'Manage Developer Access' is unchecked. At the bottom, there is a blue 'Update' button, which is also highlighted with a green checkmark.

Details	Privileges	Access IP Restrictions	Reset Password
<input checked="" type="checkbox"/> Manage Account Settings Enables/Disables access to Admin > Account Settings. Account Settings include ability to change Payment and Disbursement info.	<input checked="" type="checkbox"/> Manage Application Settings Enables/Disables access to Admin > Application Settings. Application Settings include ability to edit your location's Terms and Conditions and Geographic Restrictions.		
<input checked="" type="checkbox"/> Manage Customers Enables/Disables access to Customers > Renters. This includes the ability to see list of renters, be able to edit information, and also unassign and delete a renter's mailbox account.	<input type="checkbox"/> Manage Developer Access Enables/Disables access to Admin > Developer Access. The user will have access to API keys.		
<input checked="" type="checkbox"/> Manage Mail Settings Enables/Disables access to Admin > Mail. This includes ability to edit forwarding offerings and carriers supported.	<input checked="" type="checkbox"/> Manage Mailboxes Enables/Disables access to Mailroom > Mailboxes. This allows user to add mailboxes, and change mailbox statuses.		
<input checked="" type="checkbox"/> Manage Marketing Settings Enables/Disables access to Admin > Marketing. This allows access to ATMB marketing materials.	<input checked="" type="checkbox"/> Manage Profile Settings Enables/Disables access to Admin > Profile. This allows users to edit Site Profile settings like the site's physical address, customer address format, etc.		
<input checked="" type="checkbox"/> Manage Service Plans Enables/Disables access to Customers > Service Plans. This allows user to modify existing service plan offerings, or add new ones.	<input checked="" type="checkbox"/> Manage Shipments		
<input checked="" type="checkbox"/> Manage Users Enables/Disables access to Admin > Users. This allows user to edit privileges of other users. This also includes ability to modify user settings like email address and password, and add new users.	<input checked="" type="checkbox"/> View Resource Articles Enables/Disables access to Admin > Resource Articles. This enables user to view ATMB Resource articles and announcements from their dashboard homepage.		

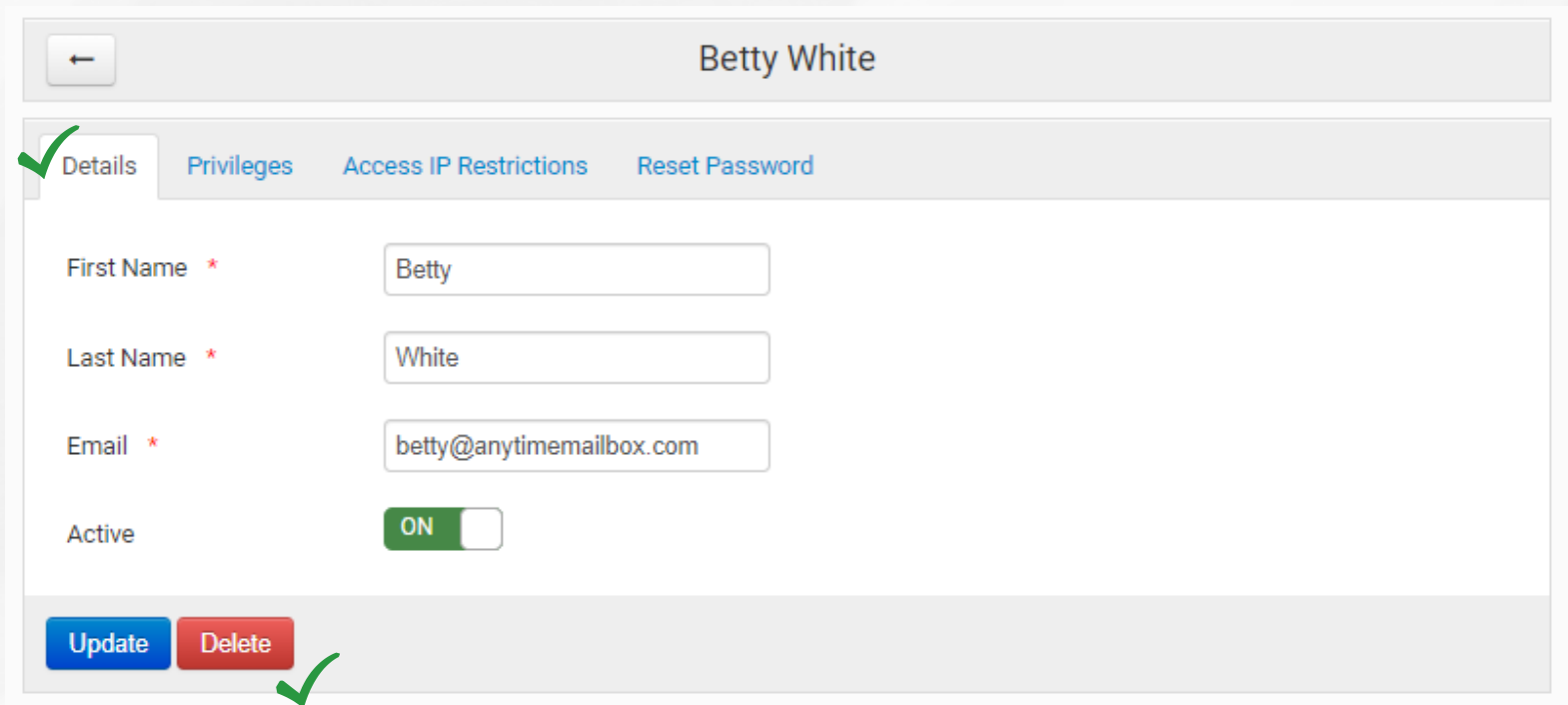
Update

| 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.



← Betty White

✓ Details Privileges Access IP Restrictions Reset Password

First Name * Betty

Last Name * White

Email * betty@anytimemailbox.com

Active ☒ ON

Update Delete ✓

**ANYTIME
MAILBOX**

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

The screenshot displays the ANYTIME MAILBOX Admin interface. At the top, there's a navigation bar with icons for Dashboard, Mailroom, Customers, Admin (highlighted with a green checkmark), and Reports. The user is logged in as 'Acia San Pedro'. Below the navigation bar, the breadcrumb trail shows 'Admin' > 'My Settings'. On the left, a sidebar lists various settings categories: Profile, Applications, Mail, Marketing, Account, Users, and 'My Settings' (highlighted with a green checkmark). The main content area shows the 'Details' subtab selected (also highlighted with a green checkmark). The form includes fields for First Name (Acia), Last Name (San Pedro), Email (anastacia+@anytimemailbox.com), and Locale (Site Default: English (United States)). A blue 'Update' button is located at the bottom of the form.

| 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

| My Settings - Reset Password

The next tab is '**Reset Password**'.

This tab allows you to **easily change and update your password for accessing the dashboard**.

If you ever need to update your password for security or any other reasons, this tab is the perfect place to do so!




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





The screenshot shows a web interface for 'My Settings'. At the top, there are three tabs: 'Details', 'Notifications', and 'Reset Password'. The 'Reset Password' tab is selected and highlighted with a green checkmark. Below the tabs, there are two input fields: 'Password *' and 'Re-enter Password *'. At the bottom left, there is a blue 'Submit' button, which is also highlighted with a green checkmark.

| 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

| 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 your dashboard to update your notification preferences?

