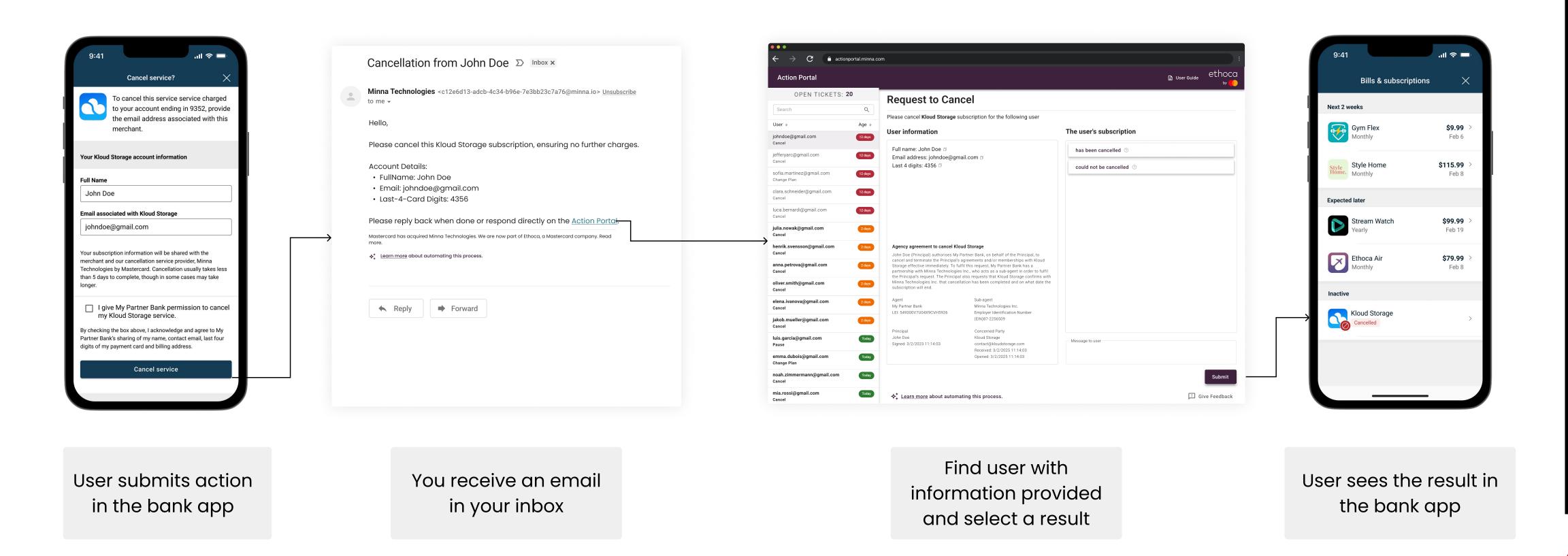


Action Portal User Guide

Getting started

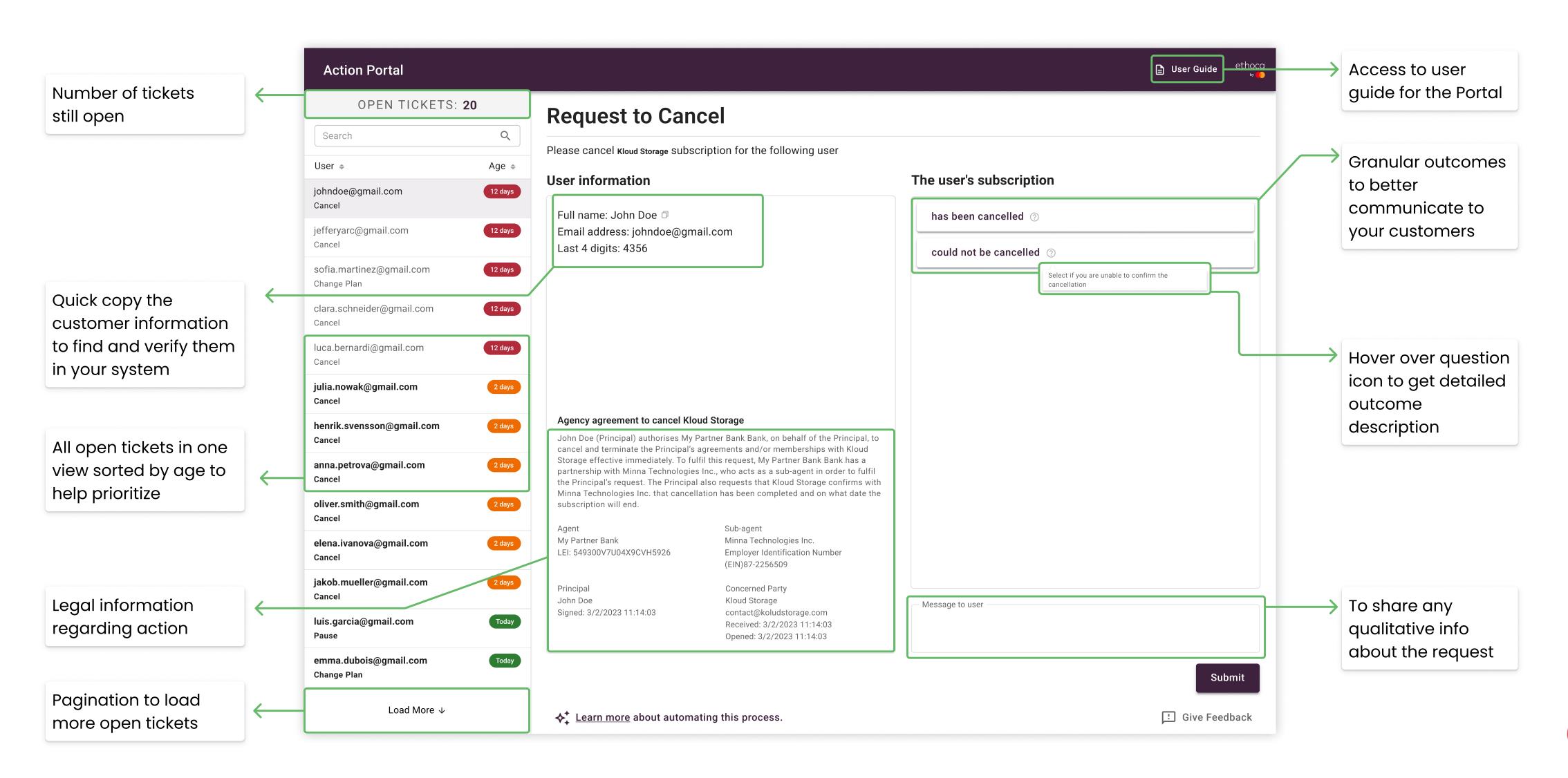
Mastercard has acquired Minna Technologies. We are now part of Ethoca, a Mastercard company. Read more.

We're delighted to partner with you to provide your customers with a best-in-class experience within their banking app. This is a guide on how to use Action Portal - a robust and efficient space for you to manage requests from your customers. With Action Portal, your customer never needs to leave the bank app to get an update on their actions



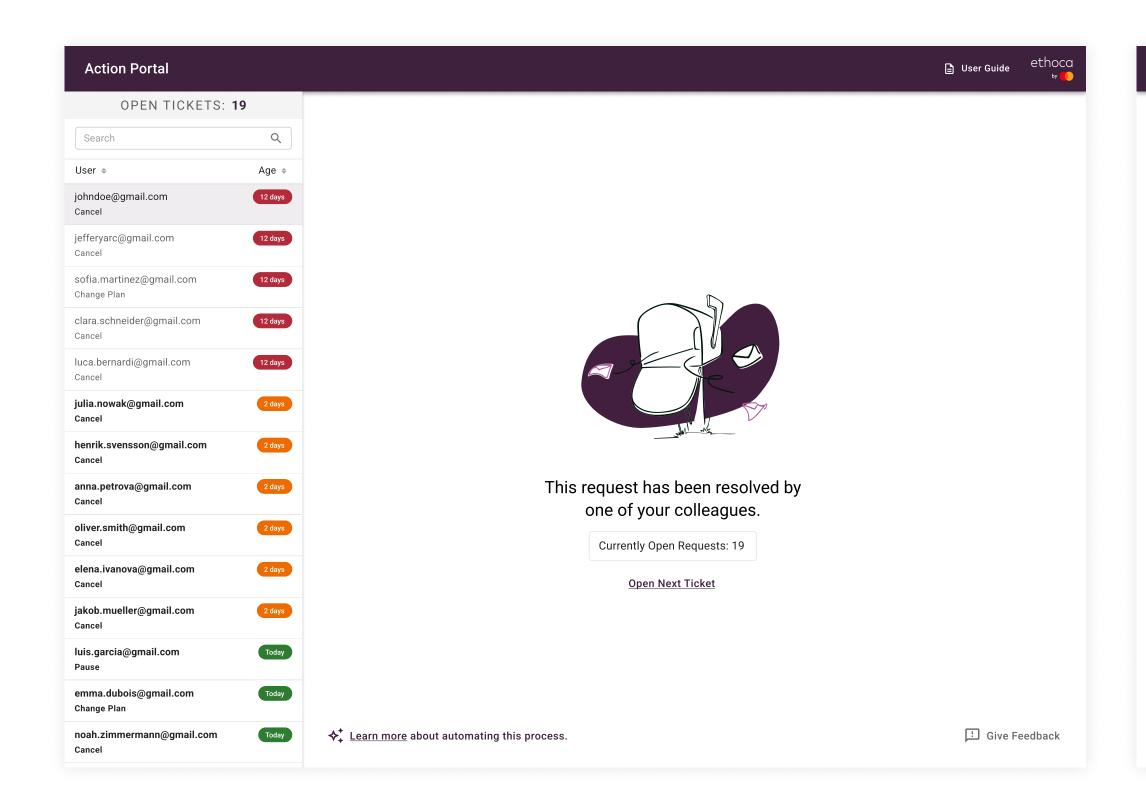
Key features (1/3)

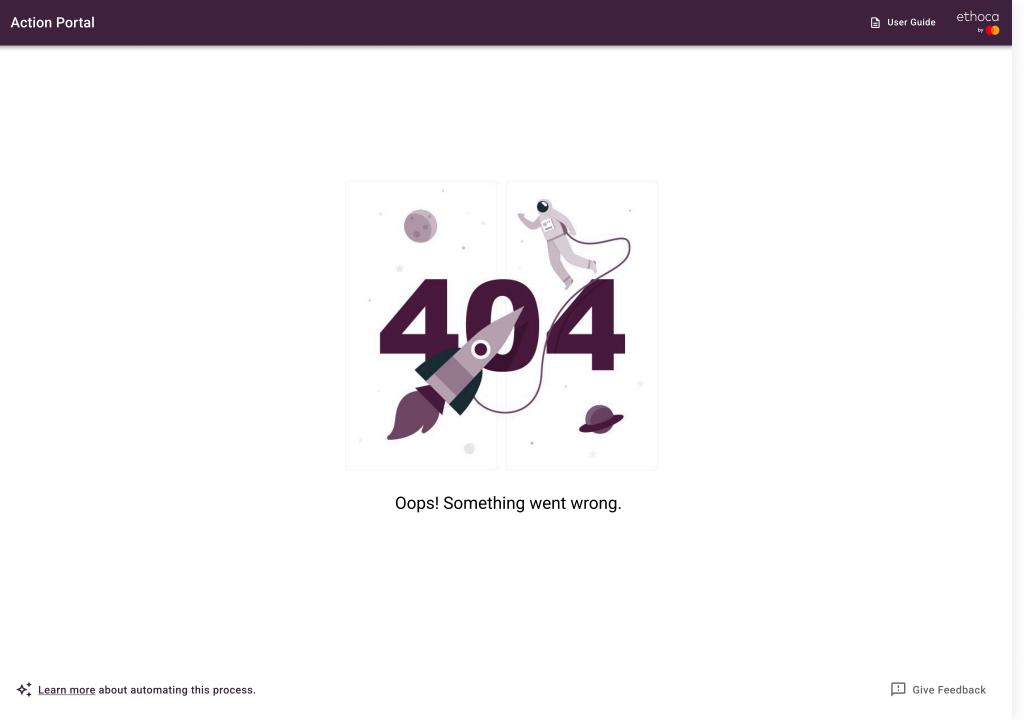
Action Portal is designed to make it easy and efficient to deliver awesome experiences for your customers



Key features (2/3)

See descriptions of the screens you may see when accessing the portal, what they mean, and what you can do next!



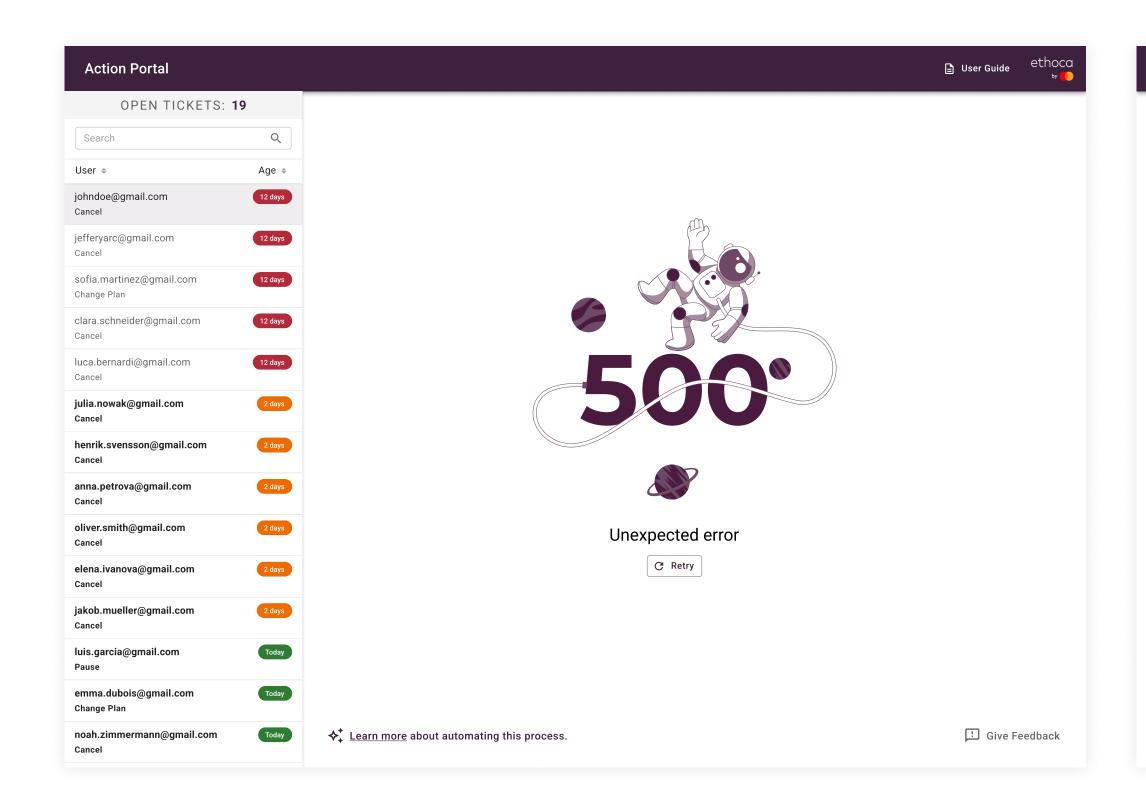


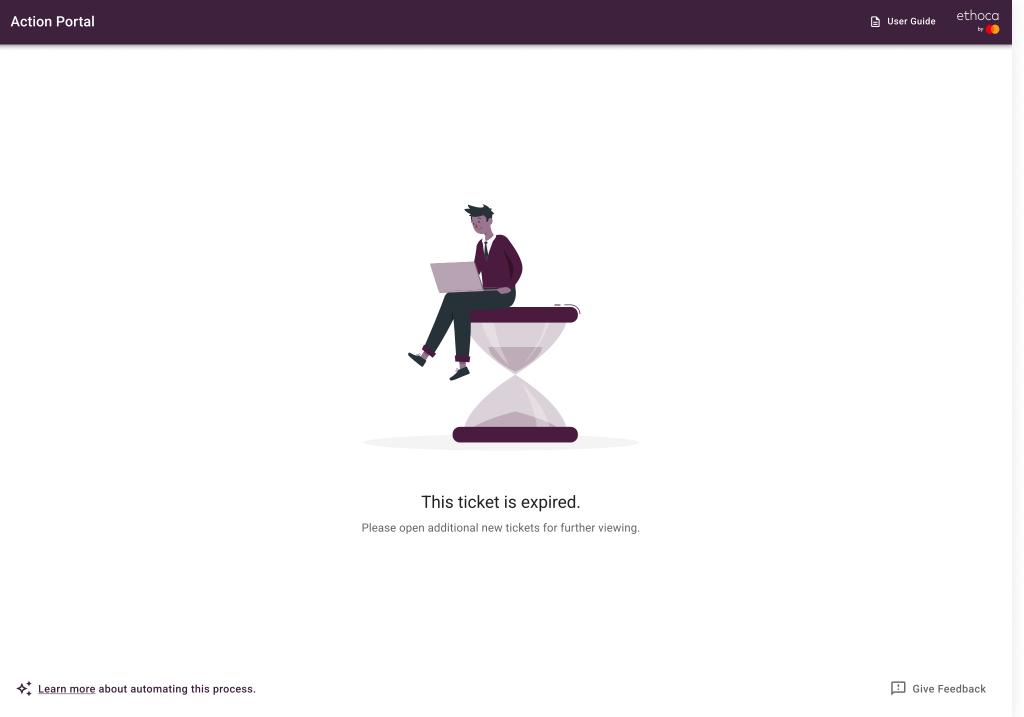
This means that your colleague has already resolved this ticket. Click on **Open Next Ticket** to work through the queue

This means that there has been an error in our system. You can use the **Give Feedback** option to write to us or send us an email at **support@us.minnatechnologies.com** and we'll get to work. You can click on another email in your inbox to access the new ticket.

Key features (3/3)

See descriptions of the screens you may see when accessing the portal, what they mean, and what you can do next!





This means that there is a temporary error in our system. Click on Retry to load the page. If it's still not working, then wait for it come back online and then retry.

The link to this ticket has now expired which means no action is required from your side. Please navigate to your support inbox and click on the latest email to access the portal.

Communicating outcomes to Ethoca (1/8)

Selecting the has been cancelled result

THEN Wer was found in your system Select has been cancelled and add the date until when the user has access THEN HOW TO SELECT A last been cancelled and add the date until when the user has access

You can cancel the

User was verified

For Example:

account

User is on a paid account or a free trial, and you can successfully cancel the subscription.

If the **user has any upcoming payments**

service.

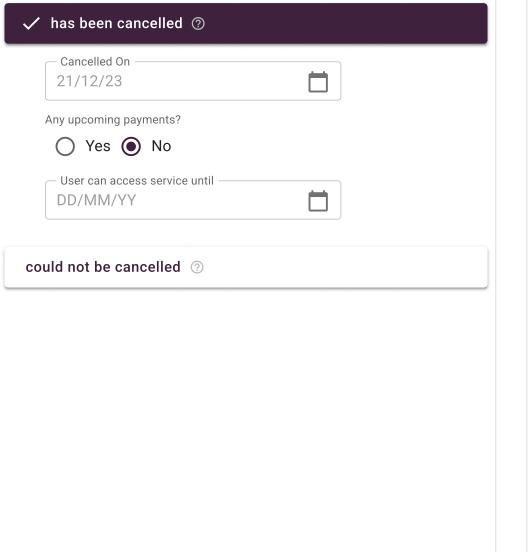
before the cancellation takes effect, then indicate the number of payments remaining, the date for the next payment, and when the user will have access to the service until

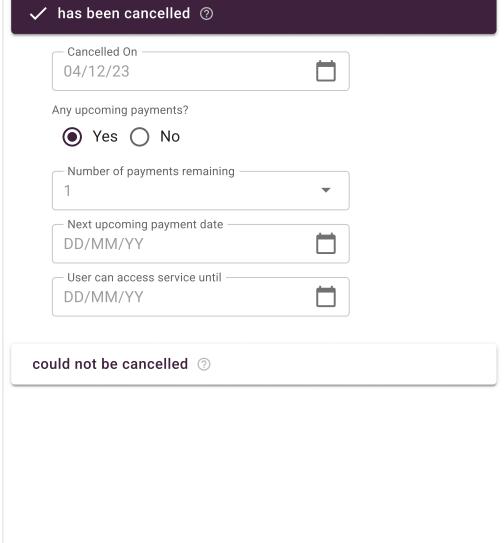
to the service. This date can

be in the past if the user

has already cancelled the

Once done, **Submit** your response

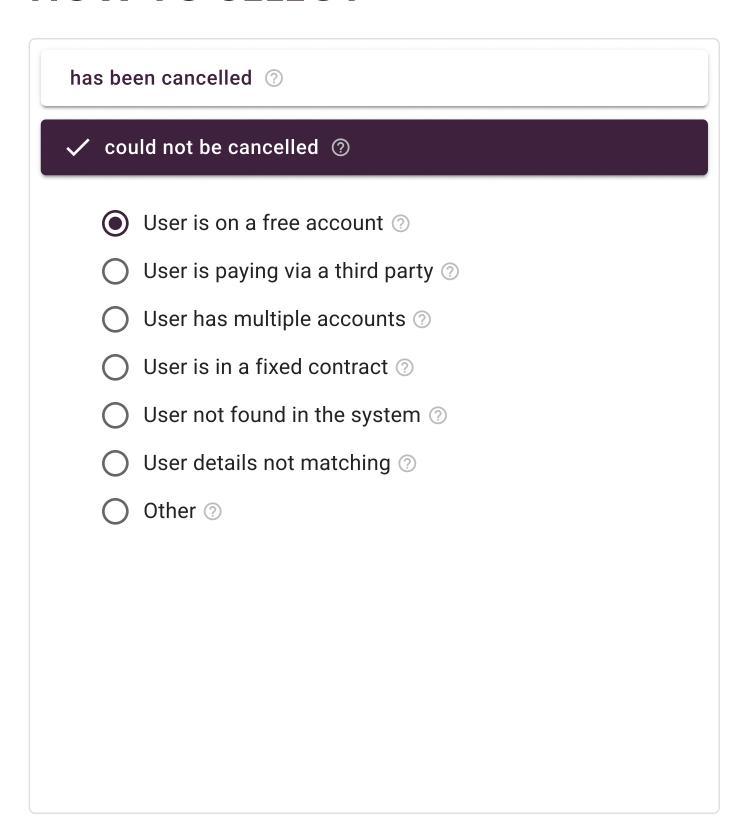




Communicating outcomes to Ethoca (2/8)

Selecting the **User is on a free account** outcome

IF **THEN** User was found in your system Select could not be cancelled and then choose **User is on free account** User was verified Once done, **Submit** your response. User is on a free account For Example: The user was on a premium account, but have now downgraded to a free plan.



Communicating outcomes to Ethoca (3/8)

Selecting the **User is paying via a third party** outcome

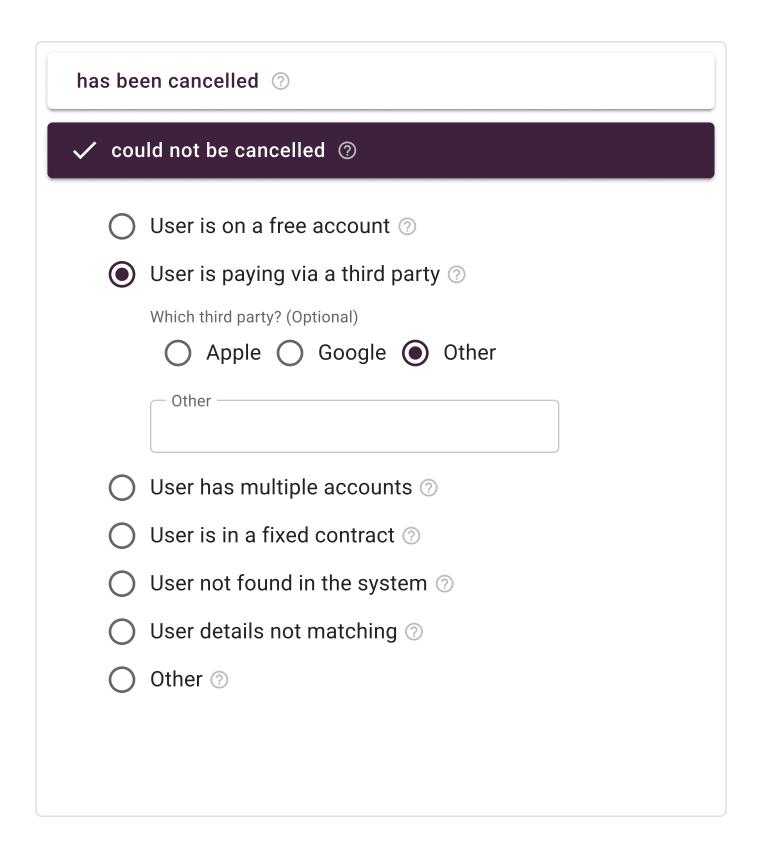
a third party

E.g. User has a subscription but is

billed and managed through a

third party.

IF User was found in your system Select User is paying via a third party, if you cannot cancel the subscription because it is billed through a 3rd party and select/add the name of the third party. Once done, Submit your response. ✓ User is billed through

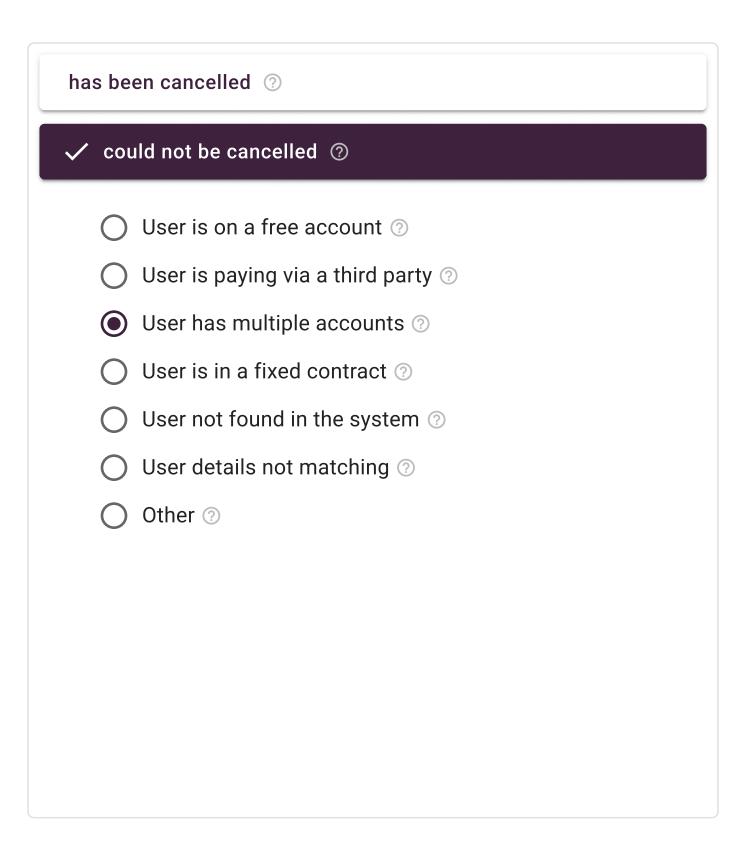


Communicating outcomes to Ethoca (4/8)

Selecting the User has multiple accounts outcome

User was found in your system Select User has multiple accounts if you found more than 1 paid account with the details provided and are unclear which subscription the user is requesting to cancel. Once done, Submit your response. ✓ User has more than 1 paid subscription

HOW TO SELECT



For Example:

User has 2 paid subscriptions and it is hard to tell which one the user wants to cancel

Communicating outcomes to Ethoca (5/8)

Selecting the **User is in a fixed contract** outcome

and subscription

For Example:

contract.

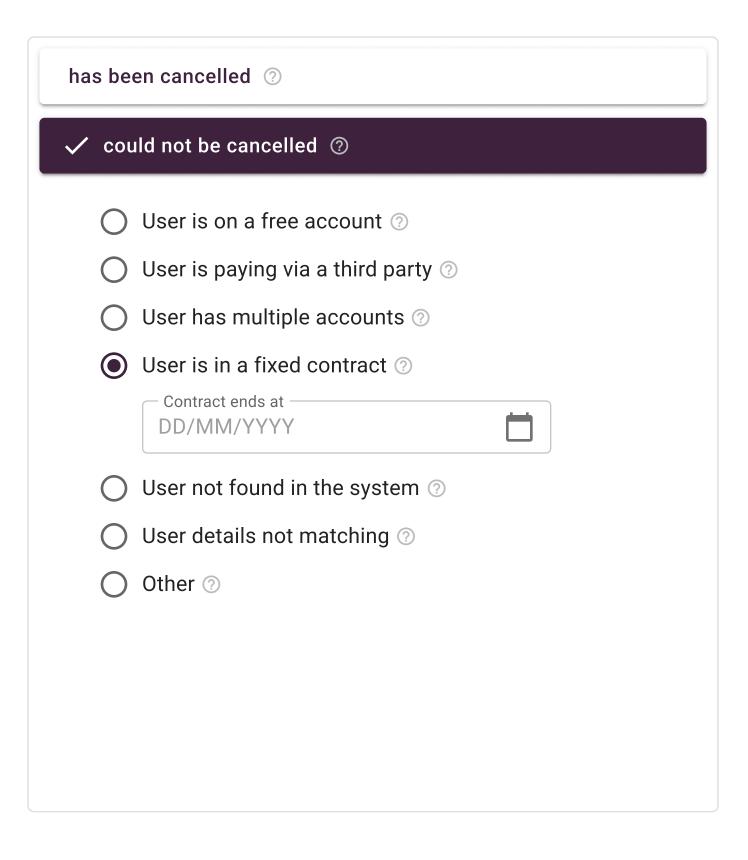
User has a subscription

months left in their

but still has a one or more

cannot be cancelled

User was found in your system Select User is in a fixed contract, if you cannot cancel the subscription because the user is under a contract and add the date when the contract will end. User is in a contract Once done, Submit your response.



Communicating outcomes to Ethoca (6/8)

Selecting the **User not found in the system** outcome

IF

- User was not found in your system
- User was not verified

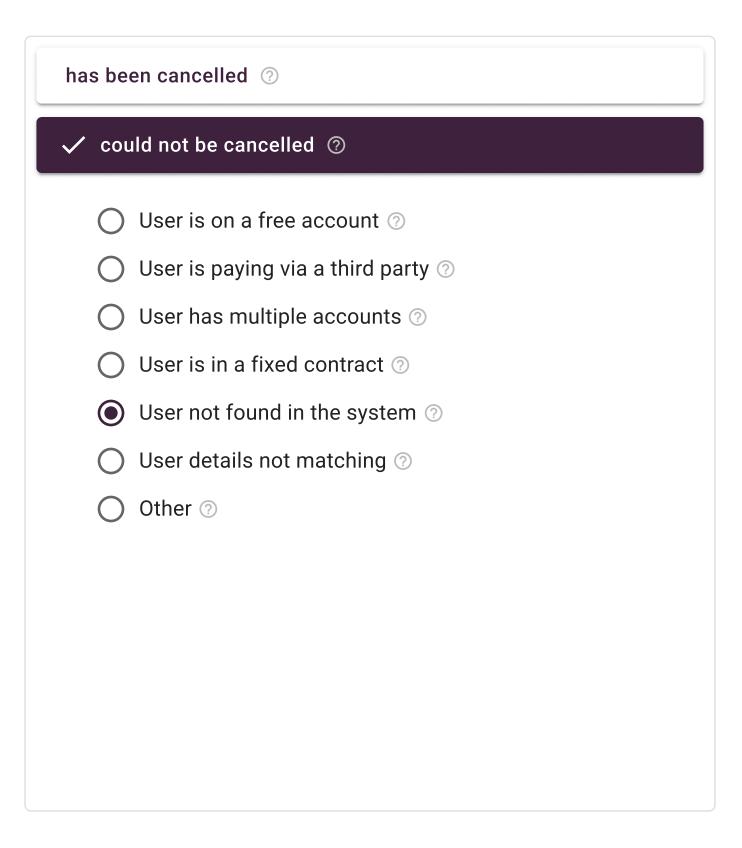
For Example:

The email address was not found in your system and neither did any of the other information, like Name or last 4 digits of the card, match any customer details on your end.

THEN

Select **User not found in the system**, if you cannot find the user with any information provided in the request.

Once done, **Submit** your response.



Communicating outcomes to Ethoca (7/8)

Selecting the **User details not matching** outcome

IF

- User was found in your system
- User was not verified

For Example:

The email address was found in your system but the last 4 digits of the card didn't match.

THEN

Select **User details not matching**, if you cannot cancel the subscription because you found the user, but could not verify the user to take an action.

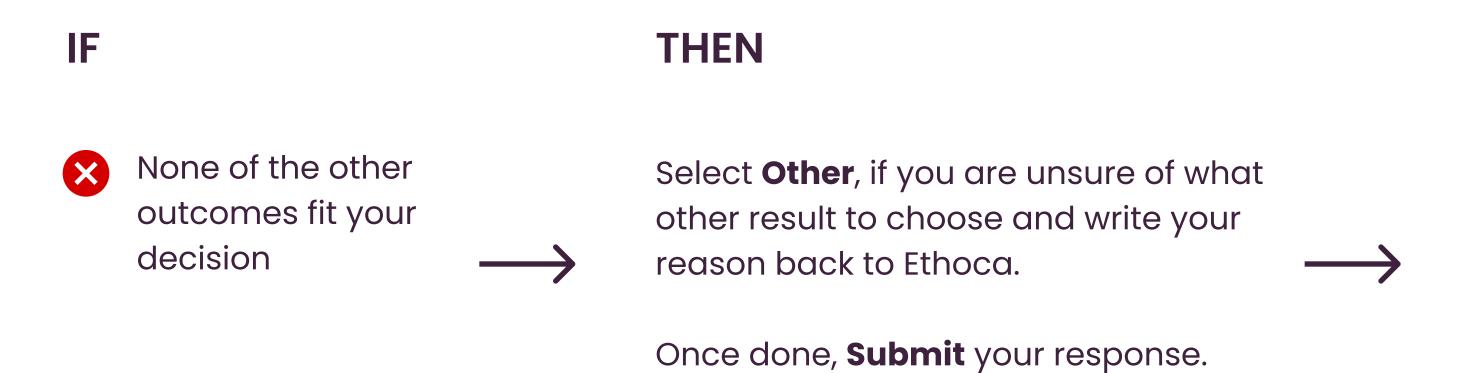
Select all the fields that did not match your system for us to guide the users retry journey.

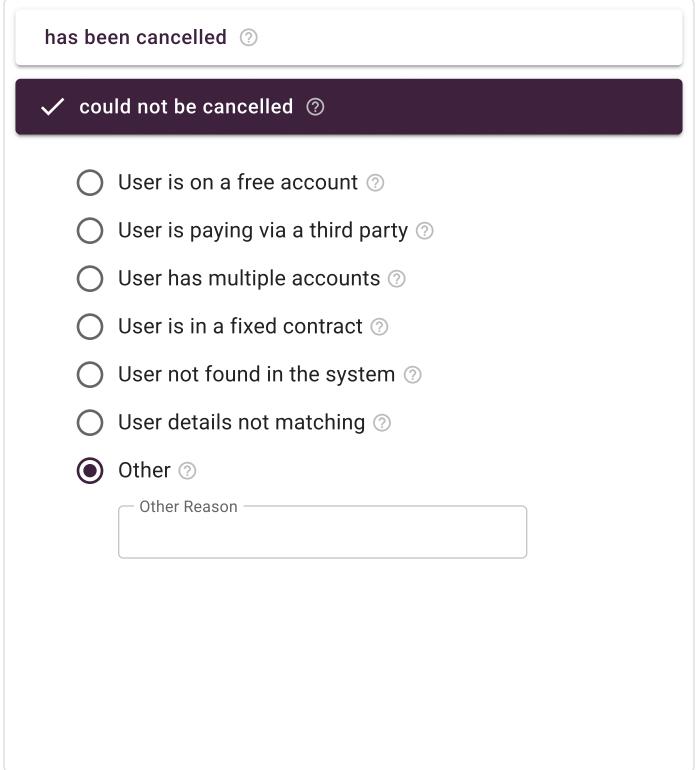
Once done, **Submit** your response.

has been cancelled ②					
✓ could not be cancelled ②					
User is on a free account ②					
User is paying via a third party ②					
User has multiple accounts ②					
User is in a fixed contract ②					
User not found in the system ②					
User details not matching ②What's wrong?Name: John Doe					
Email: john@gmail.com					
Last 4 digits: 4356					
Other ?					

Communicating outcomes to Ethoca (8/8)

Selecting the **Other** outcome





Summary of outcomes

	User was found in your system	User was verified		You can cancel the account	has been cancelled
	User was found in your system	User was verified	i	User is on a free account	User is on a free account
	User was found in your system	User was verified	À	User is billed through a third party	User is paying via a third party
	User was found in your system	User was verified	À	User has more than one account	User has multiple accounts
	User was found in your system	User was verified	À	User is in a contract and subscription cannot be cancelled	User is in a fixed contract
×	User was not found in you	ır system 💢 🕻	Jser was	s not verified	User not found in the system
	User was found in your sy	stem	User was	s not verified	User details not matching
×	None of the other outcom	nes fit your decisior	Other		

FAQs

Mastercard has acquired Minna Technologies. We are now part of <u>Ethoca</u>, a Mastercard company. <u>Read more.</u>

Why are we receiving requests from you?

Ethoca provides subscription management capabilities to your customers in their banking application. These requests are initiated by your customers who give their authorization to the bank (and in turn to Ethoca) to perform the action on their behalf.

Can I reply to your email instead of using the Action Portal?

Yes, you can respond to to the email however we recommend using the Action portal to ensure a real-time response to your customer in the bank app.

How quickly do we need to respond to requests?

We commit to a 3 calendar day time period to the customer after they take an action. It is imperative all actions are closed within this time-period to ensure your customers don't raise any disputes or chargebacks.

How do we reach out to you if we have any questions?

You can reach us either by using the "Give Feedback" button in the Action portal or by sending us a message at support@us.minnatechnologies.com. We will get back to you within 3 business days.