



APEX Gateway

USER MANAGEMENT

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User Management

In the APEX Gateway, you can create and manage multiple user accounts.

From the Users list page, you can see information on all users that have been created – Active or Inactive.

The screenshot displays the 'Users' management interface in the APEX Gateway. On the left is a dark sidebar with navigation links: Dashboard, Hosted Pay Forms, Virtual Terminal, Scheduled Payments, Customers, Users (highlighted), Reporting, and Feedback. The main content area is titled 'Users' and includes an 'ADD A NEW USER' button. Below the title is a table with columns: First Name, Last Name, Username, Email, Role, Status, and Actions. The table lists three users: sri bandaru (Administrator, Active), Employee Test (Employee, Active), and afs viewonly (View Only, Active). The table also features filters, columns, compact view, and export options. The footer shows the APEX logo and 'Powered By AFS AGILE FINANCIAL SYSTEMS'.

First Name	Last Name	Username	Email	Role	Status	Actions
sri	bandaru	sbandaru13	sripayk12+2lqa@gmail.com	Administrator	Active	
Employee	Test	ETest	daniel.rojas@rev19.net	Employee	Active	
afs	viewonly	afsviewonly@gmail.com	afsviewonly@gmail.com	View Only	Active	

Managing Users List Page

Columns

- First Name
- Last Name
- Username
 - System generated – First Initial followed by the Last Name (followed by a number if duplicates)
- Email
- Role
 - Employee, Manager, View Only, Reporting, or Administrator
- Status
 - Active/Inactive toggle
- Actions
 - Edit

Filter

By default, the Users List will display all Users.

Filtering the list can be done by selecting the **Filters** dropdown. Filter By options include:

- First Name
- Last Name
- Email

Sort By

By default, the Users List is sorted by Last Name. The sorting can be changed by selecting the sorting icon on the column name (at the top of each column) for any of the columns.

Columns Management

By default, all available columns will display. By selecting **Columns**, you can remove any columns.

Row Spacing

By selecting **Compact**, the row height will minimize to display more rows.

Export

To better manage and manipulate user information, exporting is available.

- CSV file: To export report to CSV, select the CSV icon button on the top right of the page.
- Excel file: To export report to Excel, select the Excel icon button on the top right of the page.

The file will immediately download to the computer. Simply open and manage/manipulate information.

Add New User

To create a new user, you can select **Add a New User** from the Users list page. For every User you will enter the following:

- First Name
 - Free text field – must have a minimum of 2 characters and no more than 25 characters
- Last Name
 - Free text field – must have a minimum of 2 characters and no more than 25 characters
- Email
- Role
 - Dropdown list

The screenshot shows the 'Add A New User' interface in the APEX system. On the left is a dark sidebar with a menu including 'Dashboard', 'Hosted Pay Forms', 'Virtual Terminal', 'Scheduled Payments', 'Customers', 'Users' (highlighted), 'Reporting', 'TR Transactions', 'BA Batches', 'DE Deposits', and 'Feedback'. The main content area is titled 'Add A New User' and contains a 'User Info' section. This section has four input fields: 'First Name *', 'Last Name *', 'Email *', and a 'Role *' dropdown menu. There are 'CREATE USER' and 'CANCEL' buttons at the top right of the form. The footer of the page includes the APEX logo and 'Powered By AFS'.

Role Access

Each user is assigned a role from a set list. The role will determine what menu options and information a user can see, as well as, what actions the user can perform within the gateway.

Employee

This role will only have access to the Virtual Terminal, Scheduled Payments, and Customers.

Manager

This role will have full access to APEX Gateway but will not be able to View, Create, or Edit users.

View Only

This role will have view only access to APEX Gateway including the ability to view users. User will not be able to perform any actions (ex. transactions, edit user, etc).

Reporting

This role will have access to the Dashboard and Reporting including Transactions, Batches, and Deposits. From Reporting, user will be able to export.

Administrator

This role will have full access to APEX Gateway including the ability to View, Create, and Edit users.

Reporting Admin

This role will have access to the Dashboard and Reporting including Transactions, Batches, and Deposits. From Reporting, user will be able to export. User will also have the ability to View, Create, and Edit users.