



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 page in the APEX Gateway. The page features a sidebar on the left with navigation options: Dashboard, Hosted Pay Forms, Virtual Terminal, Scheduled Payments, Customers, Users (selected), Reporting, and Feedback. The main content area shows a table of users with the following data:

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	Inactive	⋮
afs	viewonly	afsviewonly@gmail.com	afsviewonly@gmail.com	View Only	Active	⋮

The table also includes a 'FILTERS' section, 'COLUMNS', 'COMPACT', and 'EXPORT' options. The bottom of the page shows the APEX logo and 'Powered By AFS AGILE FINANCIAL SYSTEMS'.

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. The form is titled 'Add A New User' and includes 'CREATE USER' and 'CANCEL' buttons. The 'User Info' section contains the following fields:

- First Name * (text input)
- Last Name * (text input)
- Email * (text input)
- Role * (dropdown menu)

The APEX logo is visible in the top left and bottom center, and 'Powered By AFS' is in the bottom right.

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.