



APEX Gateway

USER MANAGEMENT

Date: 02/07/2024

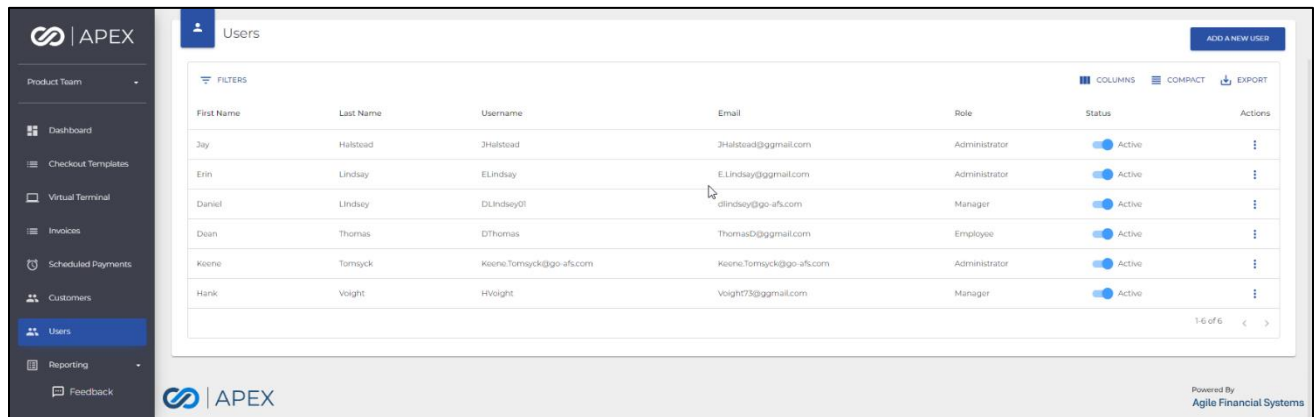
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User Management

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.



First Name	Last Name	Username	Email	Role	Status	Actions
Jay	Halstead	JHalstead	JHalstead@ggmail.com	Administrator	Active	
Erin	Lindsay	ELindsay	E.Lindsay@ggmail.com	Administrator	Active	
Daniel	Lindsay	DLindsay01	d.lindsay@go-afs.com	Manager	Active	
Dean	Thomas	DThomas	ThomasD@ggmail.com	Employee	Active	
Keene	Tomayck	Keene.Tomayck@go-afs.com	Keene.Tomayck@go-afs.com	Administrator	Active	
Hank	Voight	HVoight	voight73@ggmail.com	Manager	Active	

Managing Users List Page

Columns:

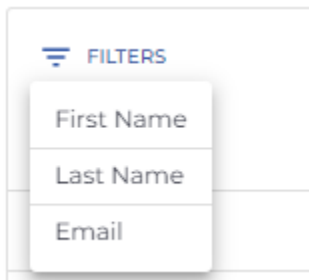
- First Name
- Last Name
- Username
 - System generated – First Initial followed by the Last Name (followed by a number if duplicates)
- Email
- Role
 - Employee, Manager, View Only, Reporting, or Administrator
- Status
 - Active/Inactive toggle
- Actions
 - Edit

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' form in the APEX system. The form is titled 'Add A New User' and has a 'CREATE USER' button and a 'CANCEL' button. The 'User Info' section contains four fields: 'First Name *', 'Last Name *', 'Email *', and 'Role *'. The 'Role *' field is a dropdown menu. The APEX logo is visible in the top left and bottom left of the form. The bottom right corner of the form says 'Powered By Agile Financial Systems'.

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.

Add A New User

User Info

First Name * Last Name *

Email *

Role * ⓘ

- Employee
- Manager
- View Only
- Reporting
- Administrator
- Reporting Admin

There is a helpful hint (identified above). When the merchant clicks on the info icon, the roles and their definitions are displayed.

Add A New User

User Info

First Name * Last Name *

Email *

Role *

Employee - User will only have access to the Virtual Terminal.

Manager - User will have full access to APEX Gateway but will not be able to View, Create, or Edit users.

View Only - User 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 - User will have access to the Dashboard and Reporting including Transactions, Batches, and Deposits. From Reporting, user will be able to export.

Administrator - User will have full access to APEX Gateway including the ability to View, Create, and Edit users.

Reporting Admin - User 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.

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