



Welcome to the
intersection of payments,
data and technology.

Getting Started with **eManager**

Admin Login & Additional User Setup

SEPTEMBER 2019

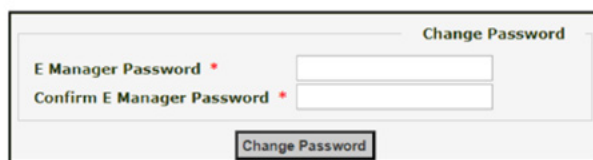


GETTING STARTED WITH eMANAGER

PASSWORD SETUP

To begin, click on the **Password link** located in the initial, new account password email you received. You'll need to choose and confirm a new eManager password in order to continue.

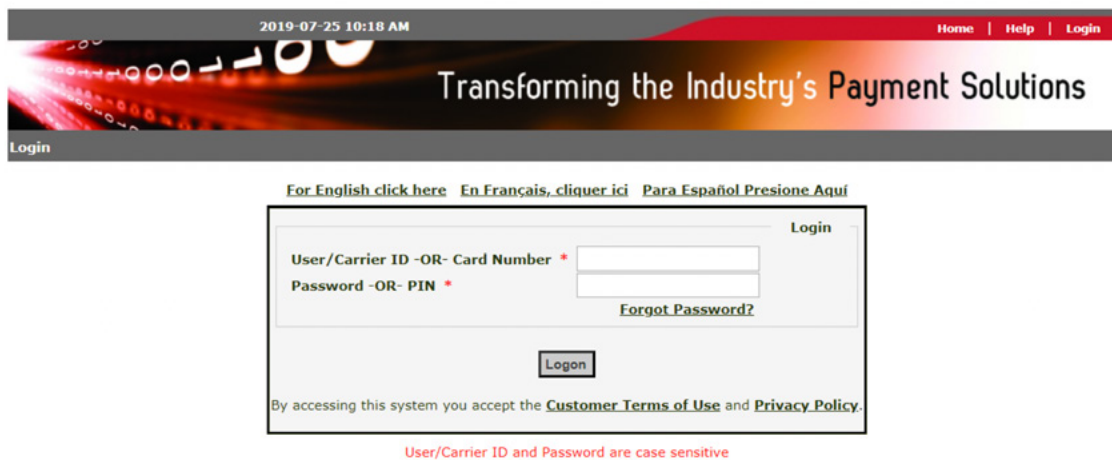
Reset User Password



** Password must have a minimum of seven characters, three of which must be distinct, and at least one digit. Avoid using special characters (e.g. ; ?)

LOG IN

To log in, enter your **USER ID (Carrier ID)** you received in your initial welcome email, and then enter the **password you just created**.



ADDITIONAL SECURITY ITEMS

Secure Entry Code

Select a 4-digit Secure Entry Code. You will need to enter this code twice for verification.

Login

Secure Entry Code Setup

As an added security measure, you will be prompted for your Secure Entry Code when logging into eManager.

Setup Instructions:

1. Enter your Email Address (for security notifications).
2. Click (with your mouse) on 4 to 9 numbers using the floating keypad.

IMPORTANT

- Your Secure Entry Code cannot be the same as your Carrier ID or your eManager Password.
- Please remember your Secure Entry Code; take notice that the numbers change position in the floating pin pad with each use.

For assistance, please contact your company eManager administrator.

Email Address

email@address.com

0	#	7 PQRS	Submit
2 ABC	3 DEF	4 GHI	Reset
*	8 TUV	1	
5 JKL	6 MNO	9 WXYZ	

Device Authentication

Enter your preferred contact details and select/answer security questions to help further safeguard your account.

Device Authentication Process

Welcome to eManager! We value your privacy and security and have just launched a new Device Authentication Process to ensure no unauthorized users can access your account information. With this new process, we are requiring all users to authenticate the device being used to access our applications, so we can ensure only authorized users have access to our systems and your customer account information. Once you complete the screen below, you will be sent a one-time Security Token that you will need to continue the authorization process and access your account information. Please continue by entering and verifying your email, cell phone number and preferred contact method (email or text) below, then click 'Save'.

Email *	<input type="text"/>
Confirm Email *	<input type="text"/>
Used to send text message (Format 5554442323)	
Cell #	<input type="text"/>
Confirm Cell #	<input type="text"/>
Cell Network	Select ▼
Preferred Contact Method *	Email ▼

Security questions are one of the ways we help ensure only you can access your account information. You will need to answer these security questions whenever you forget or reset your password - or if we suspect that someone other than you is attempting to log into your account.

Setup Security Questions	
Question #1	Which city were you born? ▼
Answer #1 *	<input type="text"/>
Question #2	In which state/province were you born? ▼
Answer #2 *	<input type="text"/>
Question #3	What is the name of your favorite cousin? ▼
Answer #3 *	<input type="text"/>

Save

Tokens

Depending on the contact preferences you've selected, your Tokens will be sent via email or text (or both). Once received, enter your Token into the designated field.

Verify Device

A Security Token notification has been sent to your preferred contact method. Please check your preferred contact method for the Security Token and enter the token below, then click Verify. **Your Security Token will expire in (10) minutes.** NOTE: if your preferred contact method was email, and you have not received the email, please check your SPAM folder.

Email Address: your*****email.com
Cell Phone #: 123****456

Verify Device

Enter Token: *

Save Device: * ☒ Yes ☐ No

NOTE: If you are currently on a public device or public network, do not save your device.

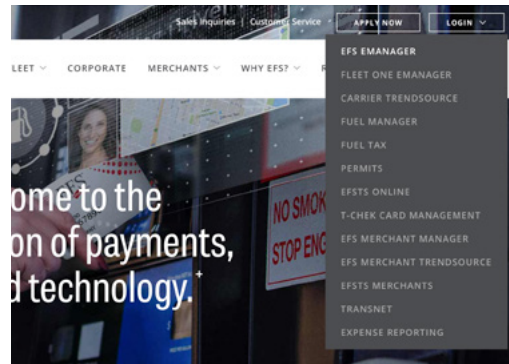
Token will expire in 09:54 minutes!

Verify

SETTING UP A NEW UNIQUE ADMIN USER ID AND PASSWORD FOR THE COMPANY ADMIN

AUTHENTICATE YOUR eMANAGER ACCOUNT

- Go to www.efslc.com and log into eManager with the credentials set up during your initial account setup process
- Hover over LOGIN area in upper right of screen
- Select **EFS eManager**
- Enter USERNAME. *This will be your Carrier ID. This is the Carrier ID provided in the initial Welcome email you received.*
- Enter PASSWORD. *This password was created via the link in the initial Password email you received.*
- Click **Logon**
- If not already filled in, enter your email address in the box under **Email Address**
- Enter the Secure Entry Code on the keypad (4 - 9 digits) - Click **Submit**
This Secure Entry Code may not always be required when logging in after your initial login. Our system can recognize IP addresses and may not require it be entered again; however many computers have a rolling IP address and the Secure Entry Code may be required on all logins. This is designed to help prevent unauthorized access to your account.
- Re-enter your email address
- Re-enter the same Secure Entry Code - Click **Submit**
- Device Authentication Process – EFS will send a token to your email or cell phone depending on your selection in the "Preferred Contact Method" box. Complete information on screen - Click **Save**
- An email and/or text will be sent depending on your selections on the previous screen. Enter the token – Click **Verify**
*If the device is public or you want to authenticate device with every login, select **No** after Save Device*



Email Address

0	#	3 DEF	Submit	Reset
4 GHI	6 MNO	*		
2 ABC	8 TUV	9 WXYZ		
7 PQRS	5 JKL	1		

Email * bob.smith@efslc.com
Confirm Email * bob.smith@efslc.com
Used to send text message (Format 5554442323)
Cell # 1234567891
Confirm Cell # 1234567891
Cell Network Verizon Wireless
Preferred Contact Method * Both

A Security Token notification has been sent to your preferred contact method. Please check your preferred contact method for the Security Token and enter the token below, then click Verify. Your Security Token will expire in (10) minutes. NOTE: If your preferred contact method was email, and you have not received the email, please check your SPAM folder.

Email Address: sgu*****tone.com

Verify Device

Enter Token: *

Save Device: * Yes No

NOTE: If you are currently on a public device or public network, do not save your device.

Token will expire in 09:57 minutes!

Verify

ADD NEW ADMINS & ADDITIONAL ACCOUNT USERS

"Select Program" > "User Administration" > "Manage Users"



- Click "**Add User**", located on left-hand side of screen
- Fill in all boxes – those noted with * are required:
 - Add **Company ID**
 - Add **User ID**: Must be unique and will be used for web login
 - Add **First Name**
 - Add **Last Name**

• **Optional Call-In Access**: If user will require access to call in and speak with any EFS employee or use IVR (automated phone system), Call-In access must be set up. Call-In access and eManager access will use same permissions.

- **Call-In ID/Employee #**: Must be unique within company
 - **Call-In Pin/Security Code**: Select Generate Temporary Pin. 4 digit PIN will be displayed in box, must be given to user. **User will then need to either login to eManager or call in through IVR within 24 hours to set a permanent PIN**
 - **Customer Service Access**: Check this to allow user to speak with EFS employees
 - **IVR Access**: Check this to allow user to use EFS IVR
 - **IVR with Issue MoneyCodes®**: Check this to allow user to issue MoneyCodes using EFS IVR
- Continue filling in all boxes:
 - **Email Address**: Please make sure email address is correct, as user will receive an email to complete set up.
 - **Country/Language**

- **Group ID:** Select applicable permission group from drop down.

Email Address * john.doe@efslc.com
 A valid eMail address is required in order to complete user setup. Please ensure the user's correct eMail address is entered.

Country / Language * English U.S.
Group ID * Company Admin

Save Cancel

* User ID can only contain numbers, letters and underscores and needs to be longer than four characters.

Choose **Company Admin [DEFAULT]** for Full eManager access to the group

- For direction on how to create a group in addition to the company admin, please see examples and instructions below.

***Note: Please contact Customer Support if you require assistance in customizing permissions.

MANAGE GROUPS

Please see the Manage Group set up examples below:

Reports_Only: Access to all reports, but no statements

Money_Codes_Only: Access to all MoneyCode features, but no card features or statements

Cards_Only: Access to all card features, but no MoneyCode features or statements

"Select Program" > "User Administration" > "Manage Groups"

- Click **Add Group** button in the top left hand corner
- Select **Company ID** from menu, fill in 'Group ID' and 'Group Description' then **Save**
- **Edit Group Permissions** – Select the 'inactive permission' then click **Add Role**
- It will move to the list below the box as a role that is permitted in the group
- **Edit Group** – Edit Group Description, then click 'Update'
- **Delete Group** – Click the 'X' of the group to be deleted, it will reconfirm that is what you intended, then click **OK** or **Cancel**

TECH TRUCKING 2015-06-18 4:58 PM Home Help Profile Logout

EFS electronic funds source

Manage User Groups Logged in as: 106002

Add Group

Group ID	Group Description	Edit Group Permissions	Edit Group	Delete Group
1000	DEMO ADMIN			
1001	DEMO DRIVERS			
1234	MC USERS			
12345	JOHN'S TEST			
17test	Test Group			
Accounting	Accounting			
Accounting_AP	Accounting_AP			
AUDET	Test group			

- An email will be sent to the email address you entered with a link and instructions for completing the user set up.
See a sample of this email to the right.

- When completed, select **Save**

If needed, supply user with “First-Time User Instructions.”

The new user will require the following information.

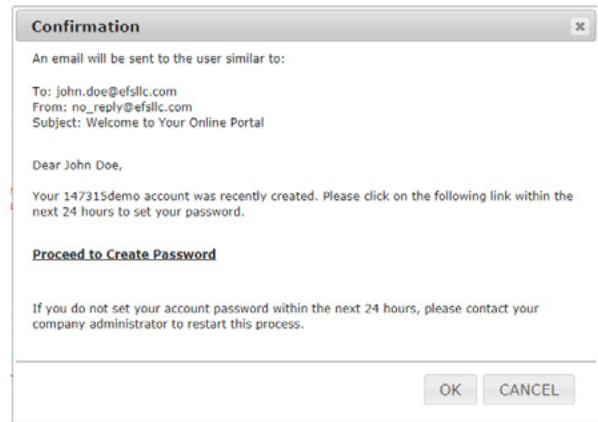
When logging into eManager:

- User ID
- Password

When calling EFS:

- Carrier ID
- Call-In ID
- Call-In PIN

NOTE: To set up additional users, Admins will need to repeat the instructions shown in the *Add New Admins and Additional Account Users* section.



SETTING UP A PERMANENT PIN VIA THE IVR OR EMANAGER

When calling into EFS you will need the following information:

1. **Carrier ID**
2. **Call-In ID**
3. **Call-In PIN**

When your Call-In credentials are created a temporary Call-In PIN is created and must be reset in 24 hours.

To set up your permanent Call-In PIN you can do one of the following:

Set your PIN by calling our automated system 888-824-7378

- Selecting Option 2 for Carrier; enter your Carrier ID followed by #
- Select Option 3
- Enter your Call ID followed by #
- Enter your temporary PIN followed by # - you will be prompted to enter a new PIN
- You have completed your Call-In / IVR credential Setup

OR

Log into eManager

- Go to www.efslc.com
- Hover over LOGIN in the upper right-hand corner and click on <eManager> in the dropdown menu
- Enter your USER ID
- Enter your PASSWORD
- Click 'Logon'
- Enter your Secure Entry Code
- In the upper right-hand corner click on 'Profile'



- In the middle of the screen you will see the screen below with your temporary PIN

A screenshot of the eManager profile page. It shows fields for 'Call-In ID/Employee #' and 'Call-In Pin/Security Code'. The 'Call-In Pin/Security Code' field contains '0141' and is marked as '(Temporary / Expires 2019-06-27)'. Below the field, there are instructions: '(Must be 4 to 12 digits) They may not be sequential(ex.1234) or repeated(ex.1111) This is a temporary Call-In Pin/Security Code'. There are checkboxes for 'Customer Service Access' (checked), 'IVR Access' (checked), and 'IVR with Issue Money Codes' (unchecked). At the bottom are 'Update' and 'Cancel' buttons. Green arrows point from the text in the previous block to the 'Call-In Pin/Security Code' field and the 'Update' button.

- Overwrite this PIN with your permanent PIN and select UPDATE
- Your PIN will now be encrypted on the screen