

eManager Administrator Setting Up New Users

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Add New User Instructions



eMANAGER ADMINISTRATOR

To login to eManager for the very first time and setup authorized Users for the account, follow the steps outlined below. First, you will need to login using your Carrier ID and main account password which was sent in a separate email. Then, you must add all individuals who will maintain the account, including yourself, as authorized Users. Once the Users are set up with their own unique credentials, the Carrier ID and main account password should no longer be used to gain access.

Please refer to the step-by-step First Time New User Guide included in your card package to aid individuals in eManager login once they have been add as Users.

LOGIN TO eMANAGER

Follow the steps below to access eManager for the first time using your Carrier ID and main account password which was sent in a separate email.

- Go to www.efsllc.com
- Hover over LOGIN area in upper right of screen
- Select EFS eManager
- Enter USERNAME. This will be your Carrier ID
- Enter PASSWORD. This was sent to you via email
- Click Logon
- If not already filled in, enter your email address in the box under **Email Address**
- Enter a 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

metho Token Token metho your S	 Jease check your preferred contact method for the Security and enter the token below, then click Verify, Your Security will expire in (10) minutes. NOTE: If your preferred contact i was email, and you have not received the email, please check PAM folder.
Emai	Address: sgu*****tone.com
	Verify Device
Enter	Token: *
Save	Device: * 🖲 Yes 🔍 No
NOTE: save y	If you are currently on a public device or public network, do not our device.
	Token will expire in 09:57 minutes!

ADD NEW USER

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

After successful login, follow the steps below to create Users. Make sure to add yourself as well as any other individuals who will need to access and maintain the account.

FTS				a :	Select Program +
Cash Advance Manage Card Login	Manage Policies	Merchant Locator	Money Codes		Cash Advance Contract Description Driver Messaging Manage Info Pool
Announcements	Statement Summary	Customer Number:	QUICK LINKS		Scheduled Reports
Welcome to eManager	Credit Limit: Available Credit: * Currency:		Customize Your		Manage Policies + Reports/Exports +
eManager Tips	ACTIVITY AFTER LAST Total Payments:	STATEMENT	 Manage Groups Manage Users 	F	User Administration · · CARD ·
Scheduled Reports	Total Transactions: Total Adjustments:		Description	t I	Credit Management >
is there a daily, weekly or monthly report you pull from	Current Account Balar	ice:		-	Trendoornee .

- 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.

The Group ID default is Company Admin which allows User full access to the account to perform any action. If you do not want a User to have this type of access, you may create Group IDs to limit their access/permissions. Please see MANAGE GROUPS section below with example Groups and instructions to create.

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

Email Address *	john.doe@efsllc.com	
A valid eMail address is required in correct eMail address is entered.	order to complete user setup.	Nease ensure the user's
Country / Language *	English U.S.	•
Group ID *	Company Admin	*

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

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'

ПШТ-ПСН ТКА		VICES		1	Select Program
Cash Advance tage User Groups	Manage Card	Manage Policies	Merchant Locator	Money Codes	Reports/Exports Logged in as: 174072
Add Group	t Oraci	Dus orienting	Edit Grown Dermissions	Edit Group	Dalata Genun
ARDHOLDER	Cardholder User (3 roup	Ö		88
CMPANY_ADMIN	Company Admin		0		

Confirmation

An email will be sent to the user similar to:

To: john.doe@efsllc.com From: no_reply@efsllc.com Subject: Welcome to Your Online Portal

Dear John Doe,

Your 147315demo account was recently created. Please click on the following link within the next 24 hours to set your password.

Proceed to Create Password

If you do not set your account password within the next 24 hours, please contact your company administrator to restart this process.

OK CANCEL

• When completed, select **Save**

If needed, supply user with "First-Time User Instructions." The new user will require the following information.

• An email will be sent to the email address you entered with a

link and instructions for competing the user set up.

See a sample of this email to the right.

When logging into eManager:

- User ID
- Password

When calling EFS:

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

Contact Information WEX

3102 West End Avenue Suite 900 Nashville, TN 37203

Toll-Free Support: 800.749.1724

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