



eManager Administrator Setting Up New Users

Add New User Instructions
FEBRUARY 2020



eMANAGER ADMINISTRATOR

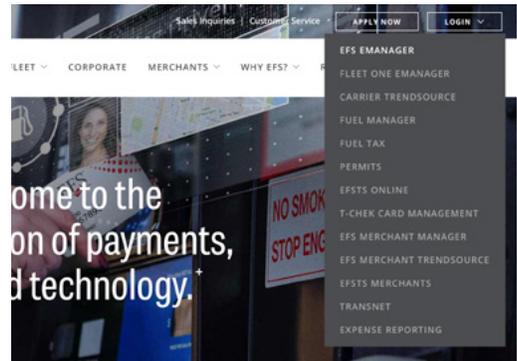
To login to eManager for the very first time and setup authorized Users for the account, follow the steps outlined below. First, you will need to login using your Carrier ID and main account password which was sent in a separate email. Then, you must add all individuals who will maintain the account, 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.

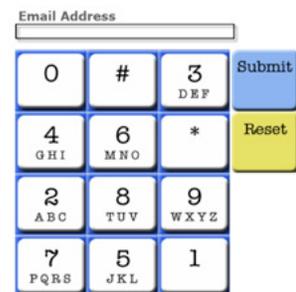
LOGIN TO eMANAGER

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.efslc.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*

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.



- 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@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.

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'**

FTS
 FUEL-TECH TRANSPORTATION SERVICES

Cash Advance Manage Card Manage Policies Merchant Locator Money Codes Reports/Exports
 Manage User Groups Logged in as: 174972

Add Group

Group ID	Group Description	Edit Group Permissions	Edit Group	Delete Group
CARDHOLDER	Cardholder User Group			
COMPANY_ADMIN	Company Admin			
TRENDSOURCE	TRENDSOURCE			

- 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**

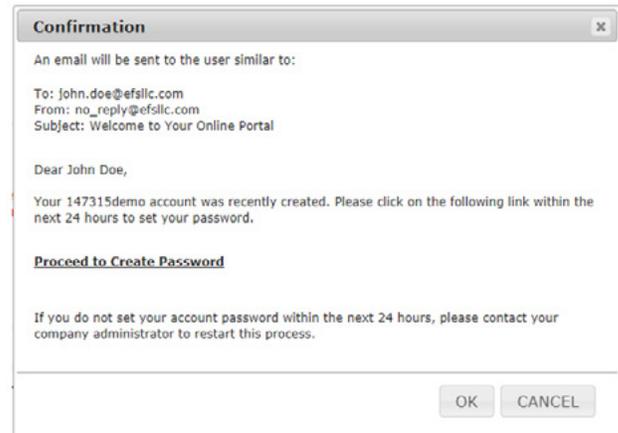
**If needed, supply user with “First-Time User Instructions.”
The new user will require the following information.**

When logging into eManager:

- User ID
- Password

When calling EFS:

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



Contact Information

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