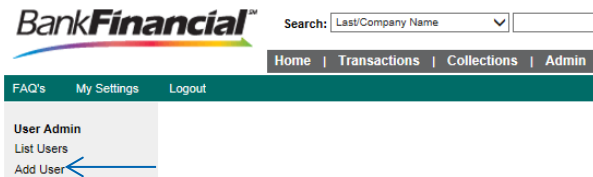


# ePay Portal – Quick Reference

## Step-By-Step Admin

### Add a User

1. From the ePay Portal home screen, select the **Admin** link from the top menu and then **Add User** from the left menu.



2. Enter the required fields. The **User Name** must be the same as the Users Online Business Banking login ID.

**Update User Settings**

Full Name:

User Name:

User Location:

Email Address:

Auto Disable:

Deal Auth Amount:

Deal Auth Status:

Enabled  
 Authorized Caller

**Privileges for this User**

Enabled Privilege	Description
<input type="checkbox"/> Customer Services	User can add/edit Customers, create payments
<input type="checkbox"/> Reports	User can view and export reports.

**Locations for this User**

Enabled	Location Name
<input type="checkbox"/>	

Check off Customer Service and Reports and click Update.

Additional options will appear. Select Accounting and whichever Locations (accounts) you want that user to have access to.

**Roles within the Customer Services Privilege**

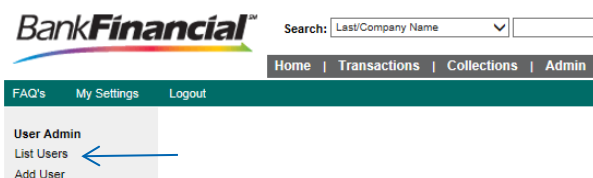
Enabled Role Name	Description
<input checked="" type="checkbox"/> Accounting	All Reporting Functionality

**Locations for this User**

Enabled Location Name	Location Enabled
<input checked="" type="checkbox"/> Forest View	Yes
<input checked="" type="checkbox"/> Garden	Yes
<input checked="" type="checkbox"/> Tree Tops	Yes

### Disable a User

1. In the left navigational bar under the **User Admin** heading, select **List Users**.



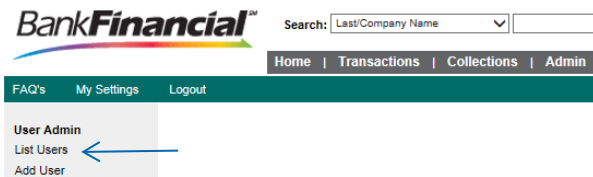
2. Under the **Edit User** heading, click the **Edit** link for the user profile you wish to disable.
3. The **Update User Settings** page displays. Uncheck the **Enabled** option, and click **Update** at the bottom of the page.

### Update User Settings

Full Name:	<input type="text" value="Joe Smith"/>
User Name:	<input type="text" value="jsmith"/>
User Location:	<input type="text"/>
Email Address:	<input type="text" value="jsmith@lunaapt.com"/>
Auto Disable:	<input type="text"/>
Dual Auth Amount:	<input type="text" value="0.00"/>
Dual Auth Status:	<input type="text" value="Approved"/>
	<input type="checkbox"/> Enabled
	<input checked="" type="checkbox"/> Authorized Caller
	<input type="button" value="Reset Password"/>
	<input type="button" value="Delete User"/>

### Delete a User

1. In the left navigational bar under the **User Admin** heading, select **List Users**.



2. Under the **Edit User** heading, click the **Edit** link for the user profile to delete.
3. The **Update User Settings** page displays. Click **Delete User**.

### Update User Settings

Full Name:	<input type="text" value="Joe Smith"/>
User Name:	<input type="text" value="jsmith"/>
User Location:	<input type="text"/>
Email Address:	<input type="text" value="jsmith@lunaapt.com"/>
Auto Disable:	<input type="text"/>
Dual Auth Amount:	<input type="text" value="0.00"/>
Dual Auth Status:	<input type="text" value="Approved"/>
	<input checked="" type="checkbox"/> Enabled
	<input checked="" type="checkbox"/> Authorized Caller
	<input type="button" value="Reset Password"/>
	<input type="button" value="Delete User"/>