

AP Gateway:

Top 5 User Management Features in AP Gateway

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Table of Contents

Top 5 User Management Features in AP Gateway 3

Creating User Accounts.....3

Configuring Users to Receive Notification Emails5

Viewing User Account Details7

Editing User Accounts.....9

Sending Reset Password Requests to Users 12

Revision Table

DATE	VERSION	AUTHOR	NOTES
6/2024	1.0	Kay Scott	Initial release

Top 5 User Management Features in AP Gateway

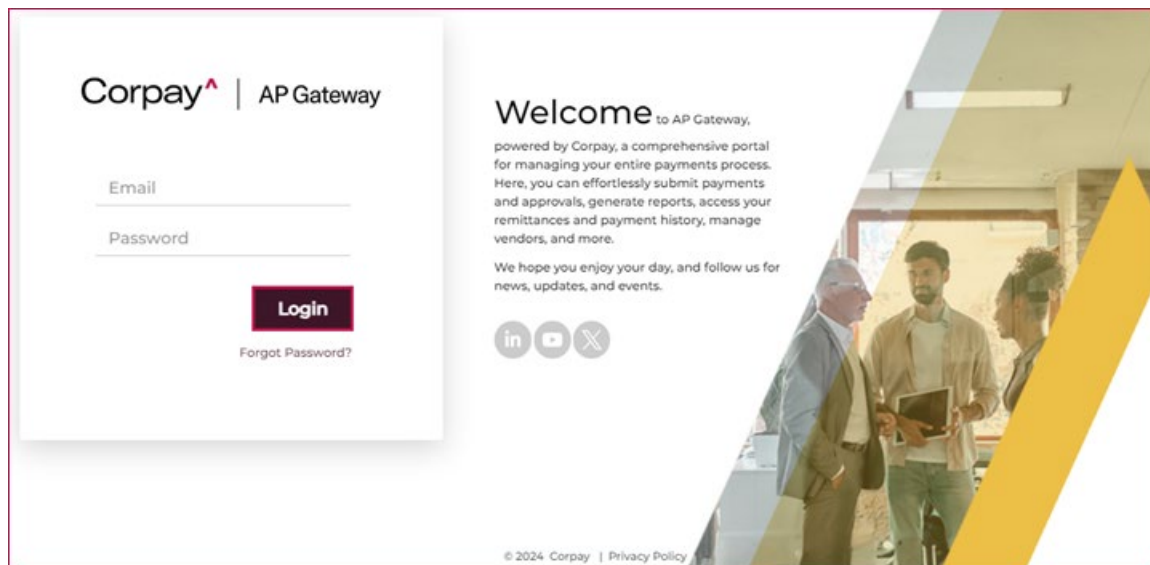
In this article, you will learn how to use the top five user management features in AP Gateway.

Creating User Accounts

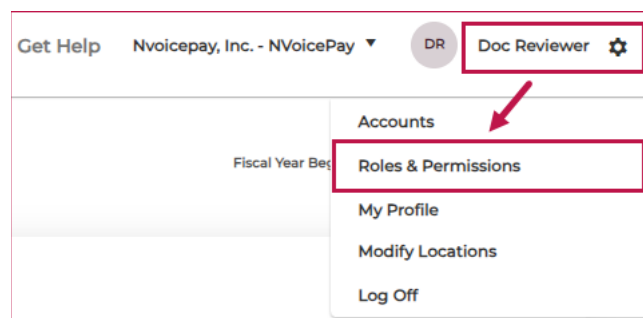
Users with the Manage Users permission can create new user accounts in AP Gateway.

To create a user account:

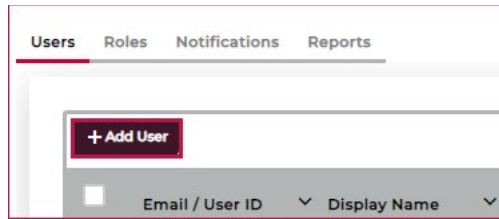
1. Log in to [AP Gateway](#).



2. Click the **username** or **gear** ⚙ icon in the *AP Gateway banner* then select the **Roles & Permissions** menu item.



3. On the *Roles & Permissions* page in the *Users* tab, click the **+ Add User** button.



4. Complete each **field** in the *Create User* dialog.
5. Click the **Save** button.

6. A message displays confirming the user account was created successfully and an email is sent to the user, from AP Gateway, inviting them to complete their account setup.

NOTE: The visibility of pages and information in AP Gateway is based on roles and permissions assigned to users by a company as well as company configuration. As a result, some pages and information may not be visible to you or may only be available in a view only format.

See the [AP Gateway Guide](#) that matches your company's configuration to learn more about the Roles & Permissions page as well as how to access, navigate, and use all features in AP Gateway.

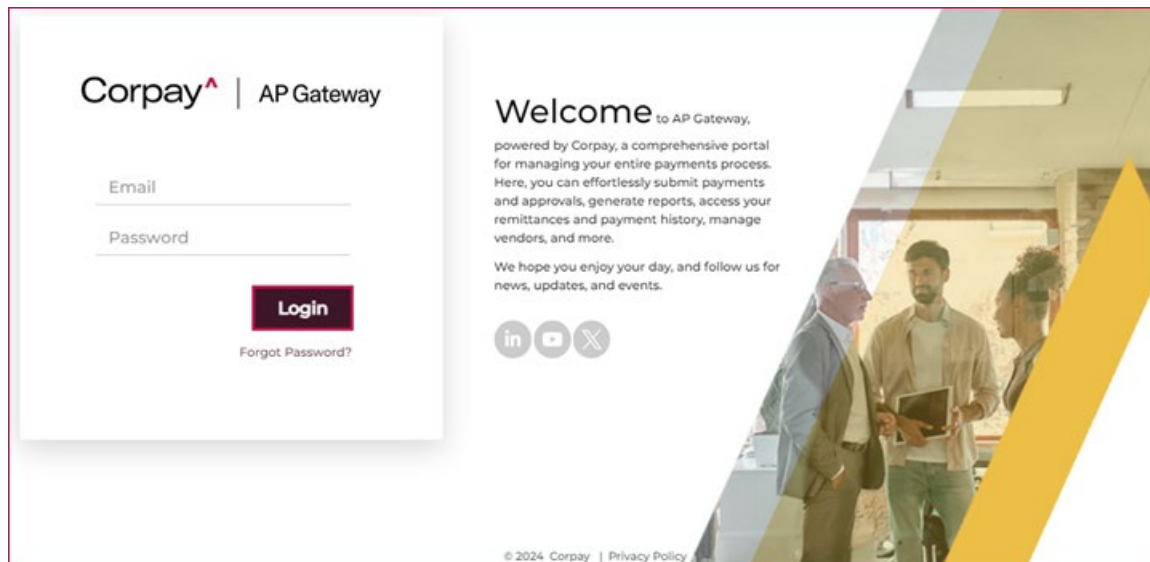
[Back to the top](#)

Configuring Users to Receive Notification Emails

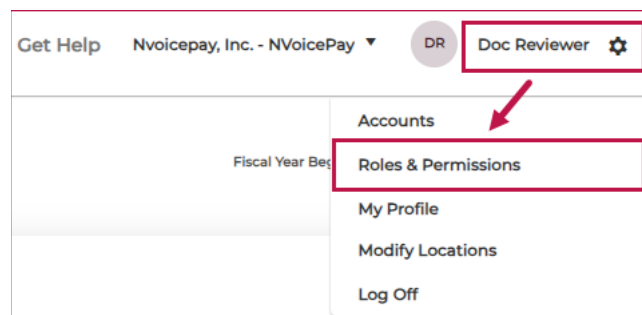
Users with the Manage Users permission can configure users to receive notification emails from AP Gateway.

To configure a user to receive notification emails:

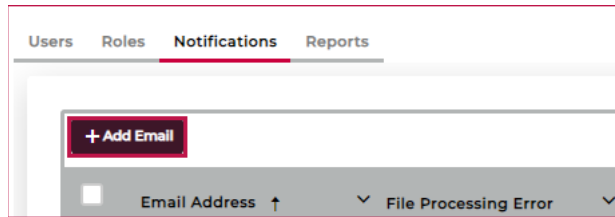
1. Log in to [AP Gateway](#).



2. Click the **username** or **gear** ⚙ icon in the *AP Gateway banner* then select the **Roles & Permissions** menu item.



3. On the *Roles & Permissions* page, in the *Notifications* tab, click the **+ Add Email** button.



4. In the *Add notification email* dialog:

- a. Enter the user's **email address** in the *Email Address* field.
- b. Select the **checkbox** for each of the Notification Email Types to send to the email address.
- c. Click the **Save** button.

5. A message displays confirming the email address was added successfully.

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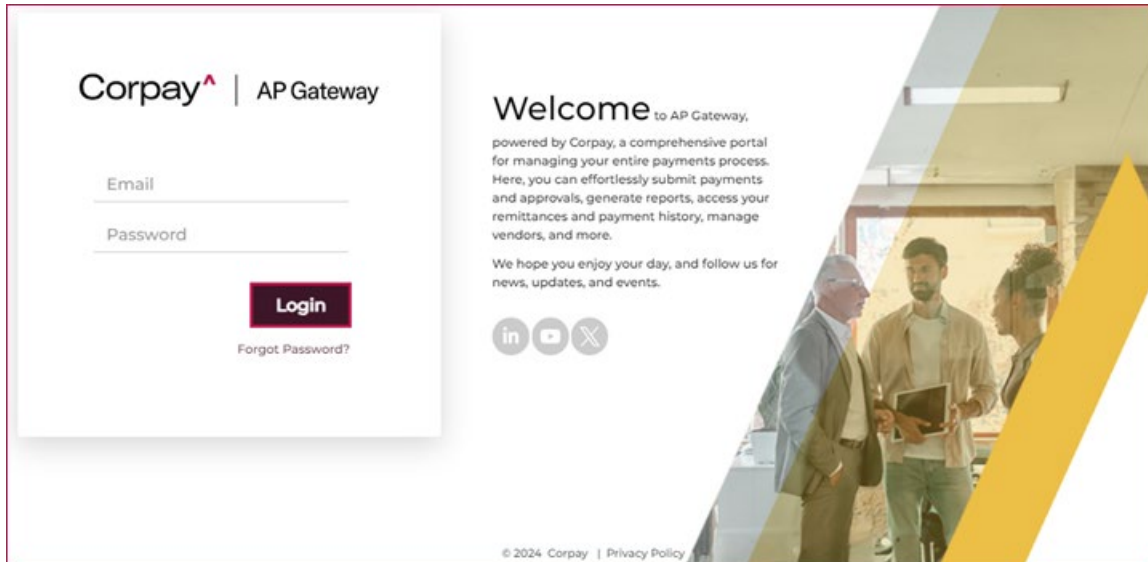
[Back to the top](#)

Viewing User Account Details

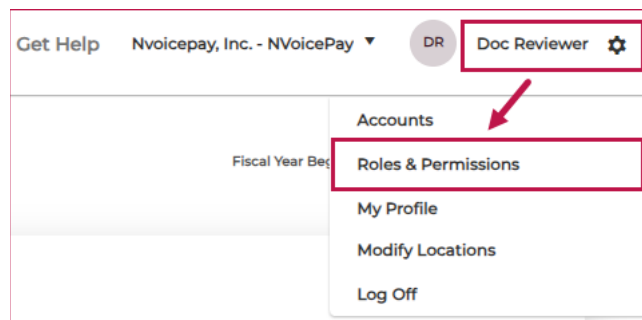
All users can view user account details for an organization.

To view user account details:

1. Log in to [AP Gateway](#).



2. Click the **username** or **gear** ⚙ icon in the *AP Gateway banner* then select the **Roles & Permissions** menu item.



3. On the *Users* tab, locate the **user account** in the *table* to view then click the **View**  action in the *Actions* column.
4. Review the **information** in the *User Details* dialog then click the **Close** button.

Organization

Partnership Integrations

Display Name

QA Automation

Job Title

Corpay

Email Address

@invoicepay.com

Phone Number

User Role

Super Admin

Permissions Authorized (From Role)

Manage Users

Manage Payment Accounts

Manage Vendors

Manage File Uploads

Batch Approver

Payment Approver

View Organization Reports

View Standard Remittance Artifacts

View Sensitive Remittance Artifacts

View Only

No Approvals

Disable Payments

Disable Approvals

Disable History

Disable Reports

Disable Vendors

Disable Invoices

Void Checks

Close

NOTE: The visibility of pages and information in AP Gateway is based on roles and permissions assigned to users by a company as well as company configuration. As a result, some pages and information may not be visible to you or may only be available in a view only format.

Watch the [View User Details, Role Details, and Hide Default Roles](#) video to see a walkthrough of the instructions above and see the [AP Gateway Guide](#) that matches your company's configuration to learn how to access, navigate, and use all features in AP Gateway.

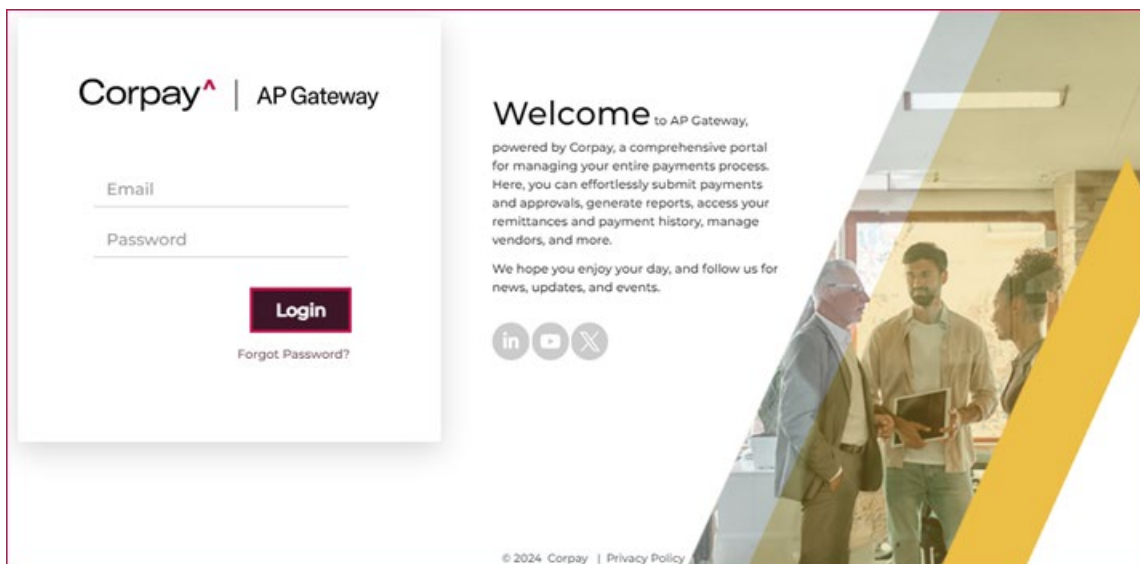
[Back to the top](#)

Editing User Accounts

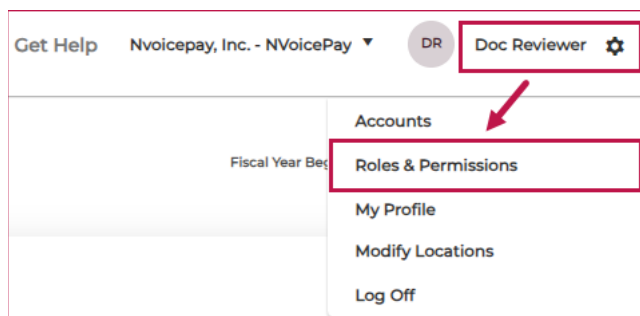
Users with the Manage Users permission can edit individual user accounts or multiple user accounts simultaneously.

To edit a single user account:

1. Log in to [AP Gateway](#).



2. Click the **username** or **gear** ⚙ icon in the *AP Gateway banner* then select the **Roles & Permissions** menu item.



3. On the *Roles & Permissions* page, in the *Users* table, click the **Edit** ✎ action for the user account to edit.
4. In the *Edit User* dialog, make the desired **updates**. If **None** is selected in the *User Role* drop-down, individual permissions can be selected in the *Permissions Authorized (From Role)* section.
5. Click the **Save** button.

Edit User

Organization

Partnership Integrations

Display Name

QA Automation

Job Title

Corpay

Email Address

@invoicepay.com

Phone Number

User Role

Super Admin

Permissions Authorized (From Role)

Manage Users

Manage Payment Accounts

Manage Vendors

Manage File Uploads

Batch Approver

Payment Approver

View Organization Reports

View Standard Remittance Artifacts

View Sensitive Remittance Artifacts

View Only

No Approvals

Disable Payments

Disable Approvals

Disable History

Disable Reports

Disable Vendors

Disable Invoices

Void Checks

Save

Cancel

6. A message displays confirming the user account was updated successfully.

To edit multiple user accounts simultaneously:

1. On the *Roles & Permissions* page, in the *Users* table, select the **checkboxes** for the user accounts to edit.
2. Click the **Edit Selected** button at the bottom of the page.

Users

Roles

Notifications

Reports

+ Add User

Display Locations

Search...

	Email / User ID	Display Name	Role	Created	Modified	Last Login	Active	Locked	Actions
☐	abc@invoicepay.com		None	01:23:15 PM 08/02/2021	01:23:30 PM 08/02/2021	08/02/2021 01:23:15 PM	false	No	
☒			Test Roles	09:04:30 AM 07/24/2023	11:23/2022 09:20:53 AM	07/24/2023 09:04:30 AM	true	No	
☒			Admin	01:40:59 PM 11/23/2022	09/28/2022 10:33:56 AM	01/05/2023 09:54:48 AM	true	No	
☒			Admin	10:23:44 AM 09/28/2022	09/28/2022 11:28:30 AM	09/28/2022 11:28:30 AM	true	No	

Edit Selected

1 2 3 4 5 6 7

Page 1 of 7

20 Rows per page

1 - 20 of 130 items

3. In the *Edit Users (Batch)* dialog, edit the **Job Title** and/or the **User Role** fields. If *None*

is selected in the *User Role* drop-down, *individual permissions* can be selected in the *Permissions Authorized* section.

Edit Users (Batch)

Organization
Partnership Integrations

Users To Edit
@corpay.com
@corpay.com
@corpay.com

Job Title

User Role
Select Role...

Permissions Authorized (Select a Role)

- ☐ Manage Users
- ☐ Manage Payment Accounts
- ☐ Manage Vendors
- ☐ Manage File Uploads
- ☐ Batch Approver
- ☐ Payment Approver
- ☐ View Organization Reports
- ☐ View Standard Remittance Artifacts
- ☐ View Sensitive Remittance Artifacts
- ☐ No Approvals
- ☐ View Only
- ☐ Disable Payments
- ☐ Disable Approvals
- ☐ Disable History
- ☐ Disable Reports
- ☐ Disable Vendors
- ☐ Disable Invoices
- ☐ Void Checks

Save Cancel

4. Click the **Save** button.
5. A message displays confirming the user accounts were updated successfully.

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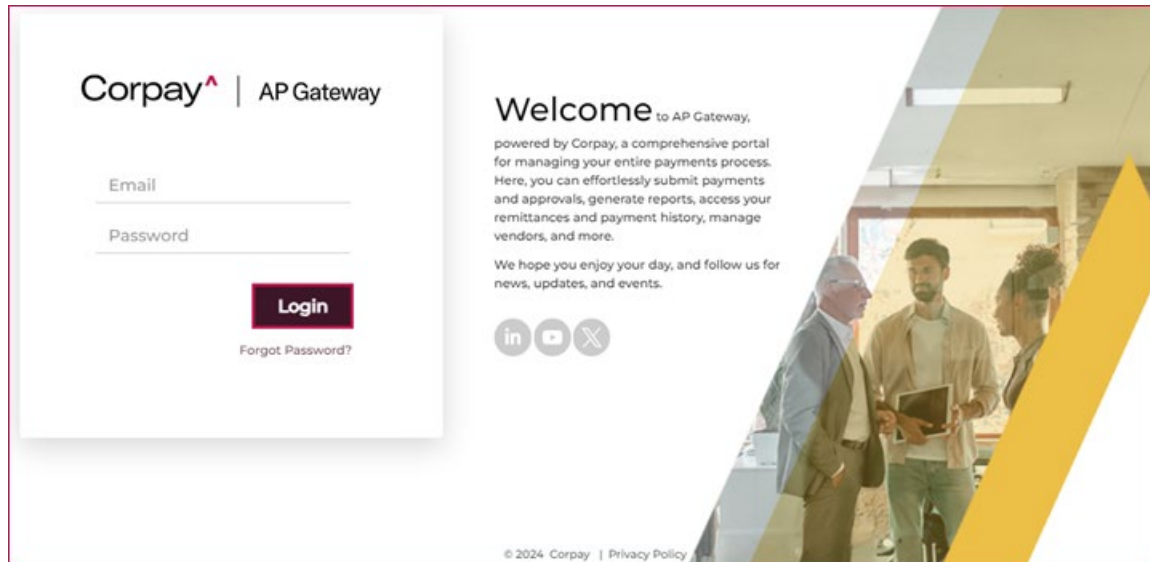
[Back to the top](#)

Sending Reset Password Requests to Users

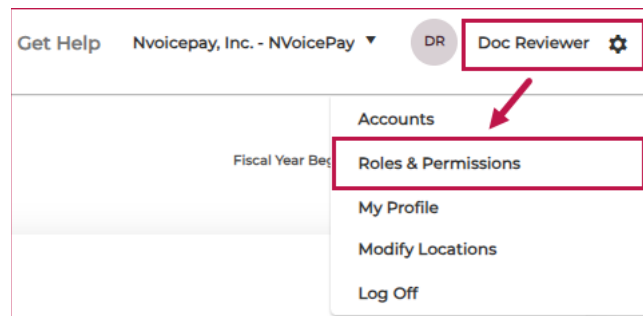
Users with the Manage Users permission can send reset password requests to users that will allow them to change the password they use to log in to AP Gateway.

To send a password reset request to a user:

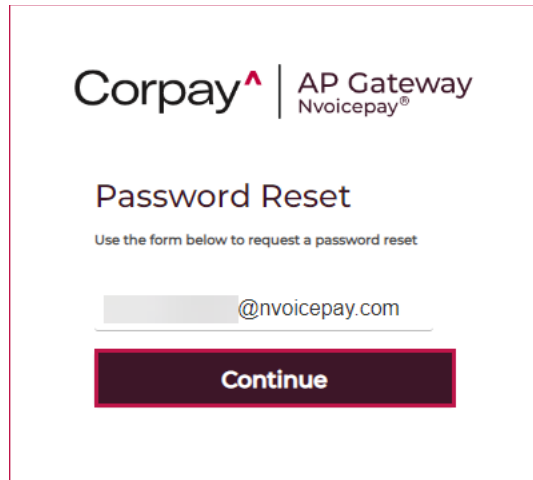
1. Log in to [AP Gateway](#).



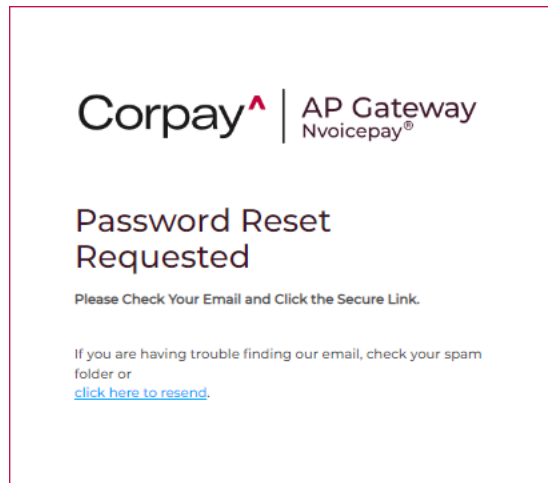
2. Click the **username** or **gear** ⚙ icon in the *AP Gateway banner* then select the **Roles & Permissions** menu item.



3. On the *Roles & Permissions* page, in the *Users* table, click the **Reset Password**  action for the user account to send the reset password request to.
4. On the *Password Reset* form, verify the **email address** is correct.
5. Click the **Continue** button.

The screenshot shows a web form for requesting a password reset. At the top, the Corpay logo is on the left and 'AP Gateway Nvoicepay' is on the right. Below the logos, the title 'Password Reset' is centered, followed by the instruction 'Use the form below to request a password reset'. There is a text input field with a placeholder '@nvoicepay.com'. Below the input field is a dark blue button with the text 'Continue' in white.

6. A message displays confirming the password reset was requested. The user will receive an email with a secure link to change their AP Gateway password.

The screenshot shows a confirmation message. At the top, the Corpay logo is on the left and 'AP Gateway Nvoicepay' is on the right. Below the logos, the title 'Password Reset Requested' is centered. Underneath, it says 'Please Check Your Email and Click the Secure Link.' Further down, it provides instructions: 'If you are having trouble finding our email, check your spam folder or [click here to resend.](#)'

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[Back to the top](#)