



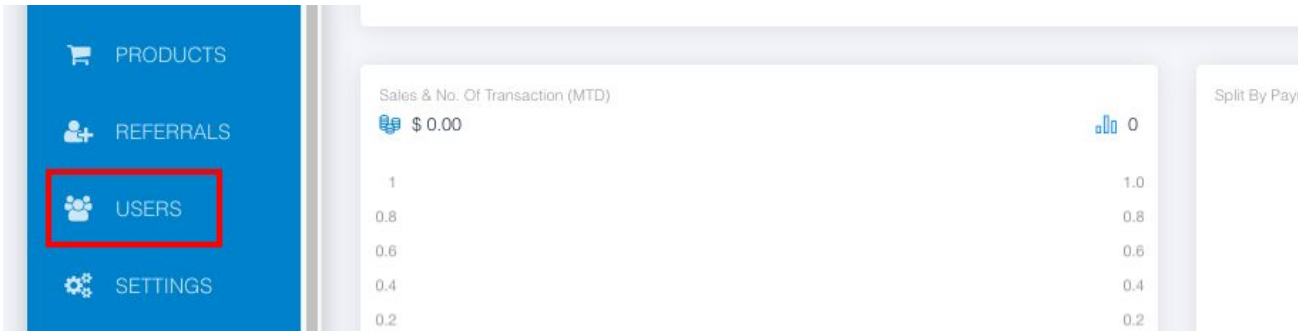
How to add user(s) to access Payex's dashboard

STEP 1 : Login to Payex's portal

- Click “**Login**” button at <https://www.payex.io/>
- It will navigate you to <https://portal.payex.io/Home>
- Login using your existing credentials

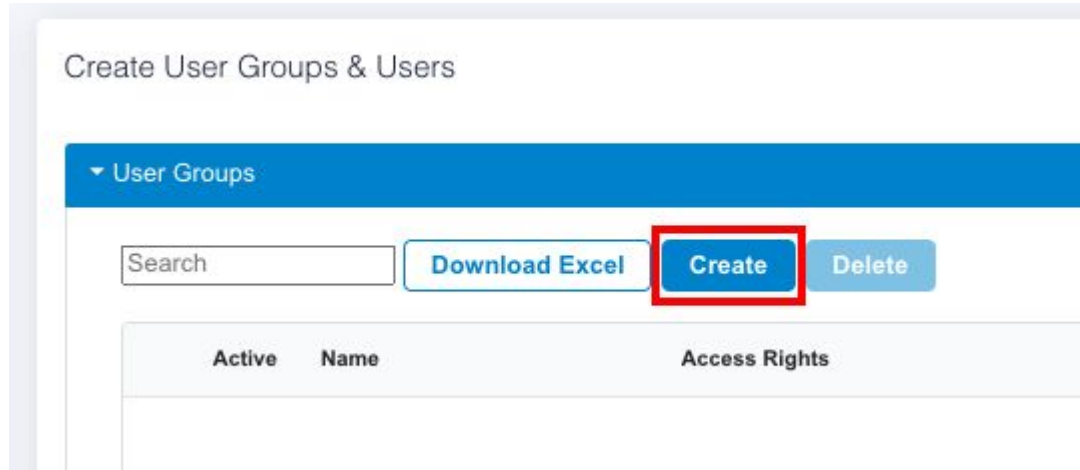
STEP 2 : Select “Users”

- Click “**Users**”



STEP 3 : Create user group

- Click "Create"



The screenshot shows a web interface for managing user groups. At the top, the title "Create User Groups & Users" is displayed. Below the title is a blue header bar with a dropdown menu labeled "User Groups". Underneath the header bar, there is a search input field labeled "Search" and three buttons: "Download Excel", "Create", and "Delete". The "Create" button is highlighted with a red rectangular box. Below the buttons is a table with the following headers: "Active", "Name", and "Access Rights".

STEP 4 : Fill out user group's details

Add User Group

Name*

Admin group

Access Control*

× General - CreatePaymentLink × Transactions - View

× Transactions - Refund

Default Group

Cancel Confirm

- Fill out the relevant details:
 - a. **Name** - fill out the name of your user group
 - b. **Access Control** - select the relevant access control for this user group
 - c. **Default Group** - toggle right the button if you would like to make this group as default group
- Click “**Confirm**” to add the user group

STEP 5 : Edit user groups

- You can edit and view the related users
- Toggle left the button to deactivate the user group

▼ User Groups

Search [Download Excel](#) [Create](#) [Delete](#)

Active	Name	Access Rights
<input checked="" type="checkbox"/>	Admin group	General - CreatePaymentLink Transactions - View Transactions - Refund
<input checked="" type="checkbox"/>	Account group	Dashboard - View Transactions - View Transactions - Refund

STEP 6 : Create users

- Click “Users”
- Click “Create”

Create User Groups & Users

▸ User Groups

▾ Users

Search [Download Excel](#) [Create](#) [Delete](#)

Active	Name	Email
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STEP 7 : Fill out users' details

Add User ✕

Name*

Michelle

Email*

michelle@gmail.com

Password*

.....

User Group*

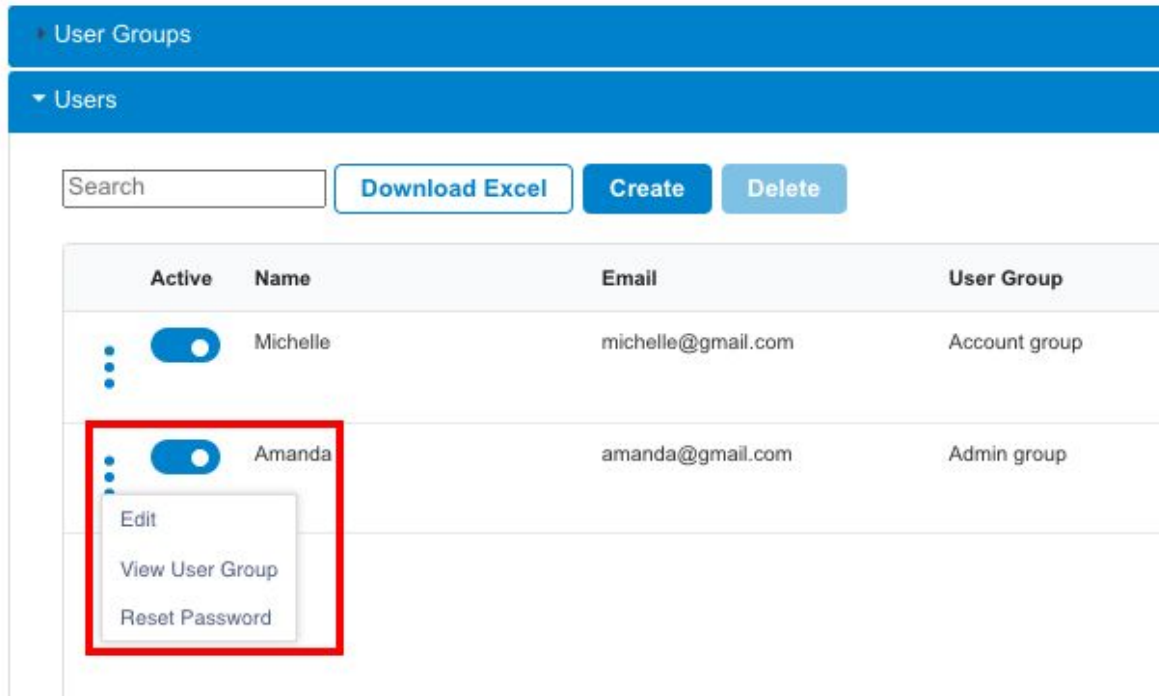
✓ Admin group
Account group

Cancel **Confirm**

- Fill out the relevant details and share the email and password to the user
- Select the relevant user group for the user
- Click **“Confirm”**

STEP 8 : Edit the users

- You can edit / view / reset password
- Toggle left the button to deactivate the user



The screenshot displays a user management interface. At the top, there are two blue navigation bars: "User Groups" and "Users". Below the "Users" bar, there is a search input field, a "Download Excel" button, a "Create" button, and a "Delete" button. The main content is a table with the following columns: "Active", "Name", "Email", and "User Group".

Active	Name	Email	User Group
<input checked="" type="checkbox"/>	Michelle	michelle@gmail.com	Account group
<input checked="" type="checkbox"/>	Amanda	amanda@gmail.com	Admin group

A context menu is open for the user Amanda, showing the following options: "Edit", "View User Group", and "Reset Password". The menu is highlighted with a red border.