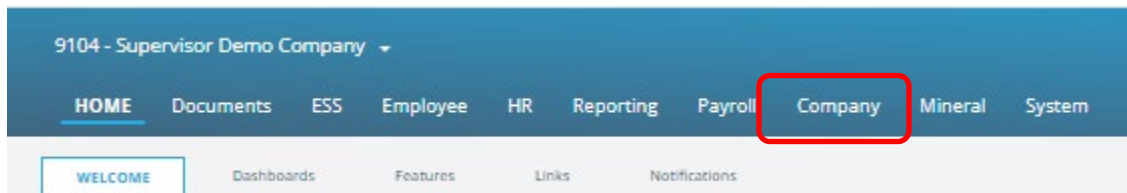
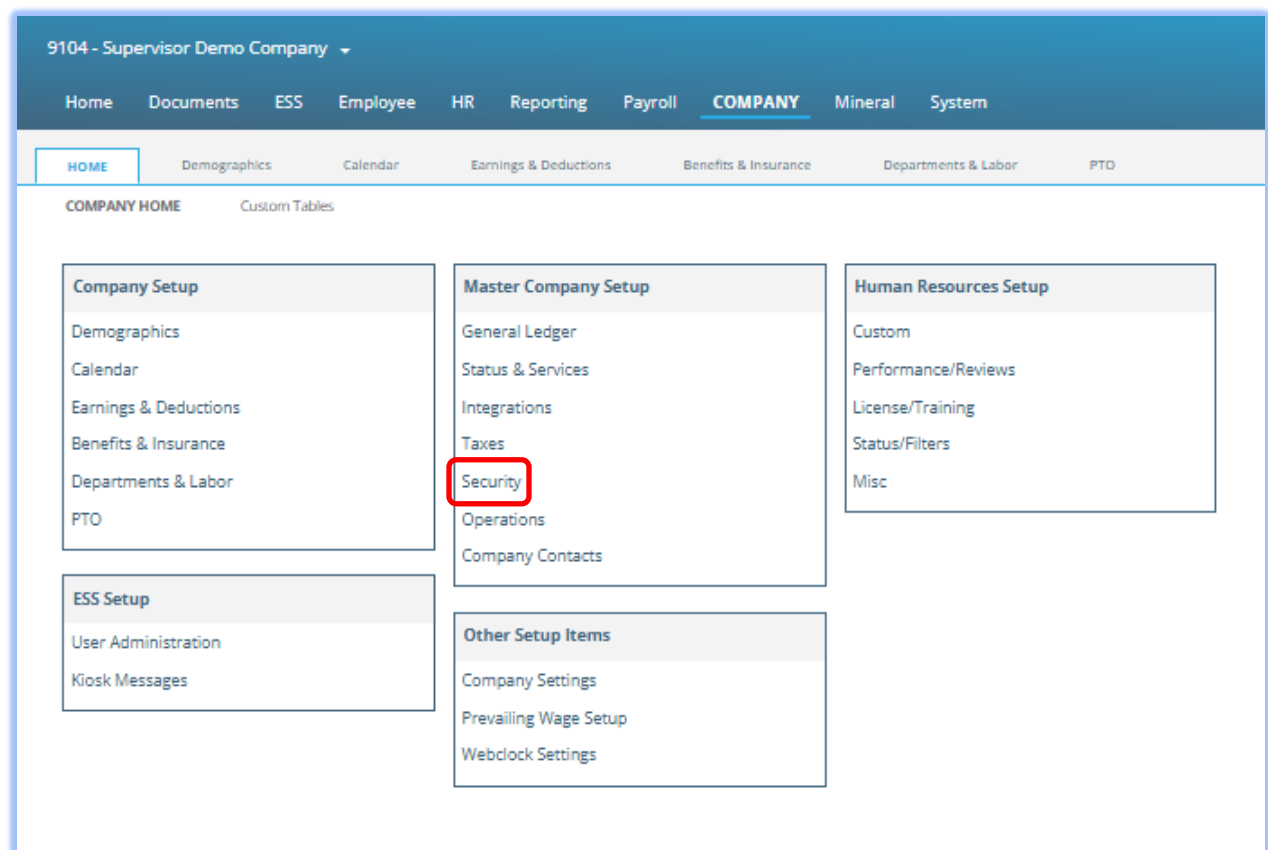


New ReadyPay Online User

1. After logging into Pay-Net Online, select the company you will be adding the new user for, then click on the “Company” link in the navigation bar.



2. From here, select Security in Master Company.



3. Select Add and enter in the new user info. Below is the standard setup for new users that have full access to the system. We generally use the first initial and full last name of users. The security role is set as Co Client RPO and user type is Company User, then click Save.

The screenshot shows the 'Add New User' form in the 'USER INFORMATION' tab. The form contains the following fields:

- Company: 9104
- User Name: 9104\mjones
- Full Name: Melissa Jones
- Security Role: Co Client RPO - Co (with an 'Edit' link)
- Title: Operations Manager
- User Type: Company User

At the bottom, there are three buttons: 'Add' (highlighted with a red box), 'Save', and 'Copy User'.

4. The next step is adding the email address that is associated with the user in the Contact Information tab, then click Save.

The screenshot shows the 'Add New User' form in the 'CONTACT INFORMATION' tab. The 'CONTACT INFORMATION' tab is highlighted with a red box. The form contains the following fields:

- Phone: (empty)
- Extension: (empty)
- Fax: (empty)
- Email: mjones@pay-net.net
- Verified?: ☐

At the bottom, there are three buttons: 'Add', 'Save' (highlighted with a red box), and 'Copy User'.

- Once this has been completed, go to the Documents Portal Access tab, and add the company to the user.

The screenshot shows a user profile for '9104\mJones - Melissa Jones' with tabs for 'User Information', 'Contact Information', 'Report Security', 'ESS User Link', and 'DOCUMENTS PORTAL ACCESS'. The 'DOCUMENTS PORTAL ACCESS' tab is active and highlighted with a red box. A modal dialog titled 'Add Application Access' is open, containing the following fields:

- Application:** Documents Portal (dropdown)
- Role:** Company - Read, upload, and delete documents. (dropdown)
- Company:** ☒ 9104, ☐ No Company Access, ☐ Supervisor Demo Company

A red box highlights the 'Company' selection area. At the bottom of the dialog are 'SAVE CHANGES' and 'CANCEL' buttons.

- Go back to the User Information tab and set a temporary password, then click Save. The new user will be prompted to change their password upon logging in.

The screenshot shows a 'Change Password' form with the following fields:

- New Password:** (input field)
- Confirm:** (input field)

A red box highlights the 'New Password' and 'Confirm' labels. The form is titled 'Change Password' and has a blue border.

Below is the template email we send out to our clients when setting up a new user:

Good Day,

We have created an online user for you and added you as a company contact. Please either call our office for your temporary password or use the forgot password link to reset this yourself, as we do not email this information. Anyone here in our office can give you your password. You will go through a brief verification process via email when you log in for the first time.

[Enter RPO website here](#)

User: mjones

Company: 9104

If you have any questions, please feel free to contact us.