



# Setting Up Your New Pay Portal



## Welcome to the DIY Guide for Setting Up Your Pay Portal

Manage all of your Applied Pay data from one simple to use resource

[appliedsystems.com/appliedpay-resource-hub](https://appliedsystems.com/appliedpay-resource-hub)

## SETTING UP YOUR NEW PAY PORTAL

Your agency portal is the central hub for all of your Applied Pay data. Setting up your portal is simple and this guide will walk you step by step through process, preparing your team for immediate success.

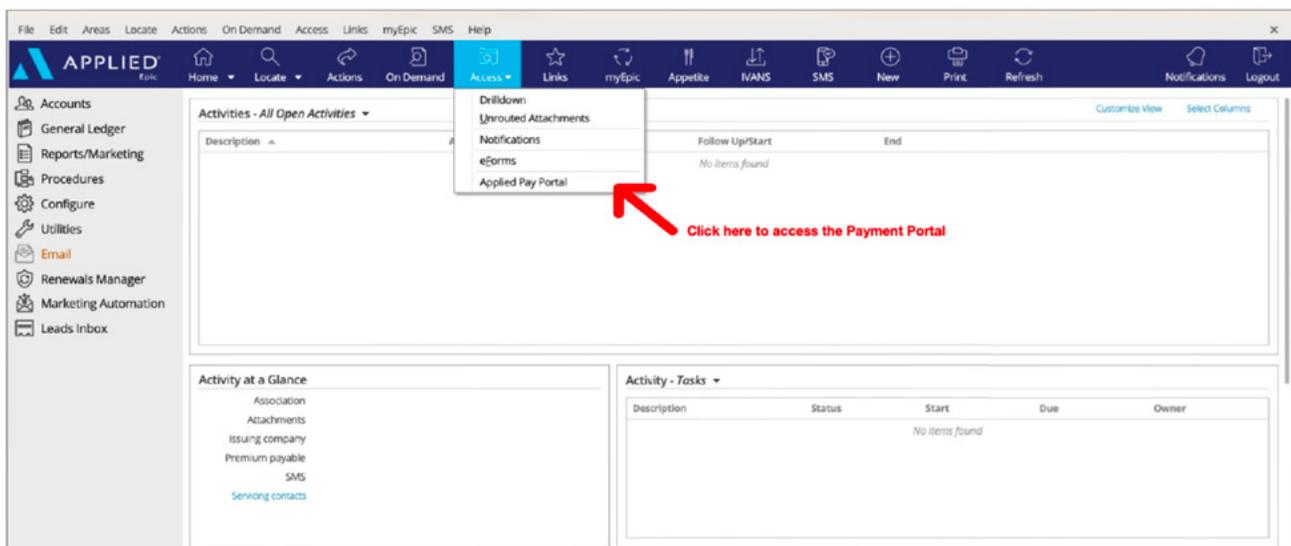
Inside the portal you will find dashboards that show real-time visibility on all daily payouts and transactions, configuration screens that allow you to assign User Permissions, control the fees you wish to be displayed at checkout, and provide access to your company's unique Hosted Payment Link that can be sent to anyone, anytime to collect a payment. You will also be shown how to upload your company logo and access important documents like payout history, daily batch settlements, and your monthly processing statement.

If you need assistance at anytime, please email your Implementation Team at [customersuccess@appliedpay.com](mailto:customersuccess@appliedpay.com) and they will get back with you immediately with answers.

## 1. Login to Your Agency Portal

Your agency portal is the central hub for all of your Applied Pay data and analytics. To access your Applied Pay Portal, login to Epic and click on the **Access** button found in the top nav of the dashboard. Choose **Applied Pay Portal** from the dropdown list.

**Note:** If you are not using the browser version of Epic you may have an Applied Pay link under the **Links** tab in the top navigation bar.



## 2. Update Your Company Info and Branding

Inside the Portal go to the left hand navigation, scroll down and click on Agency Settings then follow the steps below.

### Step 1: Complete Company Information Fields and Decide Where Notifications Should Go

**Agency Contact Email:** This is the primary email address that will receive ALL UPDATES and other important notifications. This should be an email address that is actively checked by staff.

**Support Phone Number:** Phone number provided to clients in notifications, etc., which they will call for payments support.

**Payment Method and Fees:** These fields allow you to:

- Control the method of payment that an insured can use to make a payment, i.e., Credit/Debit Card, ACH.
- Set the convenience fee charges that will be assessed on each transaction when using your Hosted Payment Page link.

**Note:** Applied Pay charges 3.5% for credit/debit card transactions and \$4 for ACH transactions, which are generally passed on to clients for the convenience of paying electronically. If you choose to absorb the fees on behalf of your clients, simply change the fees in these two fields and the new fees will be reflected on your branded checkout page.



If you choose to lower or omit the convenience fees to accommodate your clients, those fees of 3.5% for credit/debit cards and \$4 for ACH will still be assessed at settlement and remitted from your deposit.

**The following event notifications can be assigned to multiple recipients. These are sent to primary Agency Contact Email as well.**

**Payment Confirmation:** Notification sent each time a payment transaction occurs

**Refund Requested:** Notification sent out to alert that a Refund has been requested

**Refund Processed:** Notification sent out to alert that a Refund has been issued

**Chargebacks:** Notification sent out that a Chargeback situation has been instigated



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### Step 2: Upload Your Company Logo

In this same section, click the [Upload](#) button to add your company logo. This will place your company branding on each checkout page that

**Note:** Be sure to upload a high-resolution logo. There is a file size limit of 2MB. File types accepted: png, bmp & jpg.

Hit [Save](#) when finished.

### 3. Add Users and Assign Privileges

One of your first tasks will be to select team members to be Users in the system. As an administrator you will be able to set up Users in Epic, as well as assign permissions for team members who “apply” to be Users in the system.



#### Set Up Initial Users

You can control which users have access to the Applied Pay Portal from within Applied Epic. From Configure choose Security, followed by Security Groups or Users. Grant permission to the Applied Pay Portal from Program Access for the General Area or Sub-Area.

For more in-depth assistance, please visit the [Help Guide](#)

At any time, team members can request to become Users by going directly to the agency portal to log in. As they attempt to log in the following sequence of events will occur.

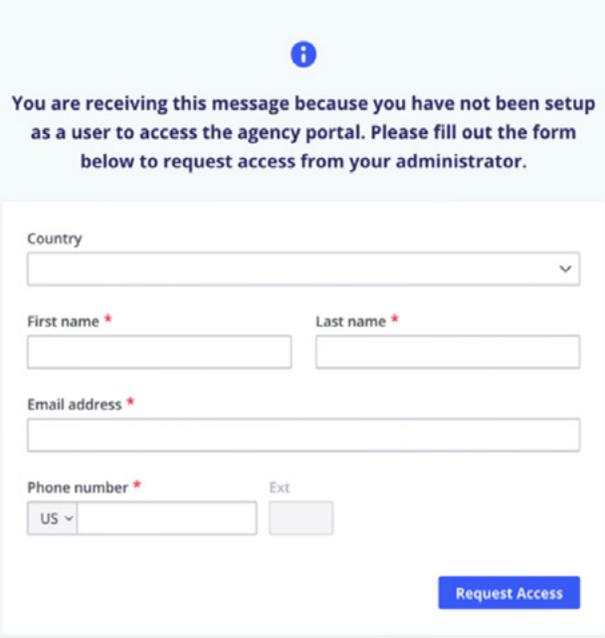
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**Step 1:** Log in to Epic and click on the “Access” (in the browser version) button on the top nav header (“Links” for non-browser). From the drop-down list choose the link labeled “Applied Pay Portal”.

On the first attempt at accessing the portal, potential users are redirected to a form to request access.



**You are receiving this message because you have not been setup as a user to access the agency portal. Please fill out the form below to request access from your administrator.**

Country

First name \*  Last name \*

Email address \*

Phone number \*  Ext

US

[Request Access](#)

**Step 2:** Prospect enters the required information and clicks Request Access.

**Step 3:** The Admin(s) on the account (or those designated in Agency Settings) will receive an email regarding prospects request

**Step 4:** Admin logs in to their Payments Portal and grants permissions under the Users tab.

Once this is complete User will be able to gain access.



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### Assigning Roles and Permissions to Users

The following roles and permissions can be granted to Users

**Administrator:** Has full access to the Applied Payment Portal. Administrators can activate and deactivate user accounts and assign/edit user roles and permissions.

**Accounting:** Has access to the Dashboard, Transactions, Payouts, Make a Payment form, and the Chargebacks /ACH /NSF sections of the Applied Payment portal for each of the merchant accounts this role can access.

**Customer Service:** Has access to individualized Dashboards, Transactions, and Make a Payment sections of the Applied Payment Portal.

These sections are limited to the merchant accounts and features the user can access, including payment details the user has processed.

*Allow or Deny* the user access to specific merchant accounts.

*Allow or Deny* the user access to modify the convenience fee.

**Step 4:** Click [Update](#).

### Setting Up Merchant Groups and Applicable Permissions

At Applied Pay we understand that you may have strategic business arrangements which will require you to set up additional merchant accounts. We have built a sophisticated hierarchy structure that allows you to set up merchant groups for those business units that operate independently of the parent company.

Our hierarchy structure allows you to set up as many merchant groups as necessary, and assign roles and permissions to certain individuals within those organizations to manage their merchant activity, including daily transactions, batch payouts, convenience fees, etc.

If you need to set up additional merchant accounts for child agencies or other business units that operate independent, but still want to manage oversight on these accounts, you can read more on how to set this up by reading through [Merchant Groups](#) in our [Help File](#). Or reach out to one of our Digital Payments Specialists at [customersuccess@appliedpay.com](mailto:customersuccess@appliedpay.com) and they will assist you.

**Applied is here as your technology partner.**  
**Visit [appliedsystems.com](https://appliedsystems.com) to learn more and get started.**

