Manage: Adding & Removing User Roles

Training Manual

Parent SOP: Manage: System Overview & Basics| Estimated Time 10 minutes

1. Objective

This manual establishes and maintains secure access control for the PayRange Operator account. This training manual defines the available user roles and associated permission levels to ensure access is granted appropriately. It further describes the procedures for adding users, monitoring "Free Vend" activity, and revoking access when it is no longer required.

2. Accessing the User Menu

Navigate:

1. Open a web browser and navigate to: https://manage.payrange.com/#/login/
2. Log into your Manage account.
3. Click "Settings" at the bottom of the left sidebar (see ***Figure 1***).
4. Select "Users" from the sub-menu.

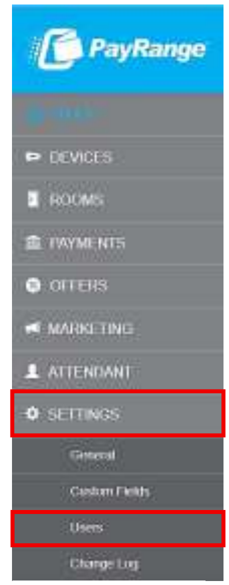

Figure 1

3. Role Definitions & Access Levels

Selecting the correct role is critical for account security. Use the definitions below to determine the appropriate access level for each user.

- **Owner:** Administrative role with full access to the PayRange Manage console.
- **Manager:** Similar to the Owner role but cannot view or modify banking information and cannot add or remove users.
- **Route Driver:** Intended for route drivers and technicians needing to install devices.
  - *Tags must be applied to the user upon creation to define their specific device access.*
- **Distributor:** Intended for users external to your organization. This role allows management of multiple PayRange Operator accounts with full access to Manage, excluding Payments/Banking information.
- **Finance:** Intended for users who require access to financial records and sales insights. This role does not provide access to banking information.
- **Customer Service:** Assigned to individuals responsible for managing and improving the consumer experience.
- **Supervisor:** Assigned to users who need to directly manage devices.
- **Business Operations:** Intended for users requiring operational oversight of the Operator account, including sales, device, and payment information.

- **Attendant:** Intended for users who require access **only** to the Attendant Feature (Free Vend). This role does **not** provide access to the Operator account or any associated sales or banking information.
    - **Additionally**: Attendant Mode can be enabled for any assigned user role to grant Free Vend access while retaining that role's existing permissions (see Section 6 for more information).

User Role	Sales	Payment	Devices	Marketing	Rooms	Offers	Attendant	Settings
Attendant								
Route Driver	tagged*		tagged*					
Customer Service	✓		✓***					
Finance	✓	✓	✓					
Business Operations	✓	✓**	✓					
Supervisor			✓					
Distributor	✓		✓	✓	✓	✓	✓	✓
Manager	✓		✓	✓	✓	✓	✓	
Owner	✓	✓	✓	✓	✓	✓	✓	✓

Figure 2

4. Adding Users to the Operator Account

Use this process to grant access to employees or third-party technicians.

1. Access the "Users" menu (see Section 2).
2. Click the "**Add Users**" button in the top right corner (see ***Figure 4***).
3. A new row will appear. Based on the column, requirements fill in the following user information:
    a. **Name**
    b. **Email Address**
        - *Note for PayRange Installers:* When adding a third-party technician, use their specific prtech###@payrange.co email address.

   c. Click the drop-down menu to select the appropriate "Role" based on the definitions from Section 3.
4. **Tags** are required only for the "Route Driver" user role:
   a. Enter a memorable keyword (e.g., tech). (see ***Figure 4***)
   b. This tag acts as a key, allowing the Route Driver to view only machines labeled with the same tag.
5. Click the **blue checkmark** button in the "Actions" column to save the new user.

Figure 3

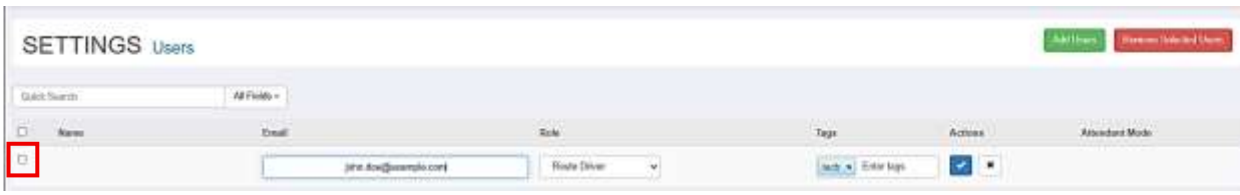

Figure 4

5. Removing Users from the Operator Account

User access must be revoked immediately when a staff member leaves or a technician completes their Quality Control (QC) check.

1. Access the "Users" (see Section 2).
2. Select the checkbox to the left of the user's "Name" you wish to remove (see the red box in ***Figure 4***).
3. **Review Carefully:** Do <u>not</u> select the account labeled "Owner".
4. Click the red "**Remove Selected Users**" button in the upper-right corner.
5. Verify the correct user in the confirmation message labeled "Users Removed". *(see **Figure 5**)*
6. Click "OK"

Figure 5

6. Attendant Mode (Free Vends)

Attendant Mode allows designated staff to start machines without payment for cleaning, testing, or customer refunds.

Note: Attendant Mode is a premium feature that requires activation (monthly fee applies).

A. One Time Setup

You must enable feature limits before assigning Attendant Mode to staff.

Click “ATTENDANT” in the left sidebar

1. select "Configuration" from the sub-menu (see ***Figure 6***).
2. Enable attendant feature by checking the box (see ***Figure 7***).
3. **Maximum Amount per Transaction:** Set to the highest vend price (e.g., $5.00) to prevent errors.
4. **Daily Limit:** Set a maximum number of vends per user per day (e.g., 5).
5. **Tags (Optional):** Used to limit access to specific machines.

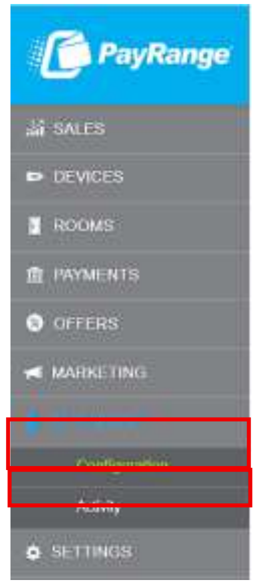

Figure 6

6. **Require Comment/Ticket ID:** Check this box to require a reason (e.g., "Test") for each activation.
7. Click "Update Configuration".

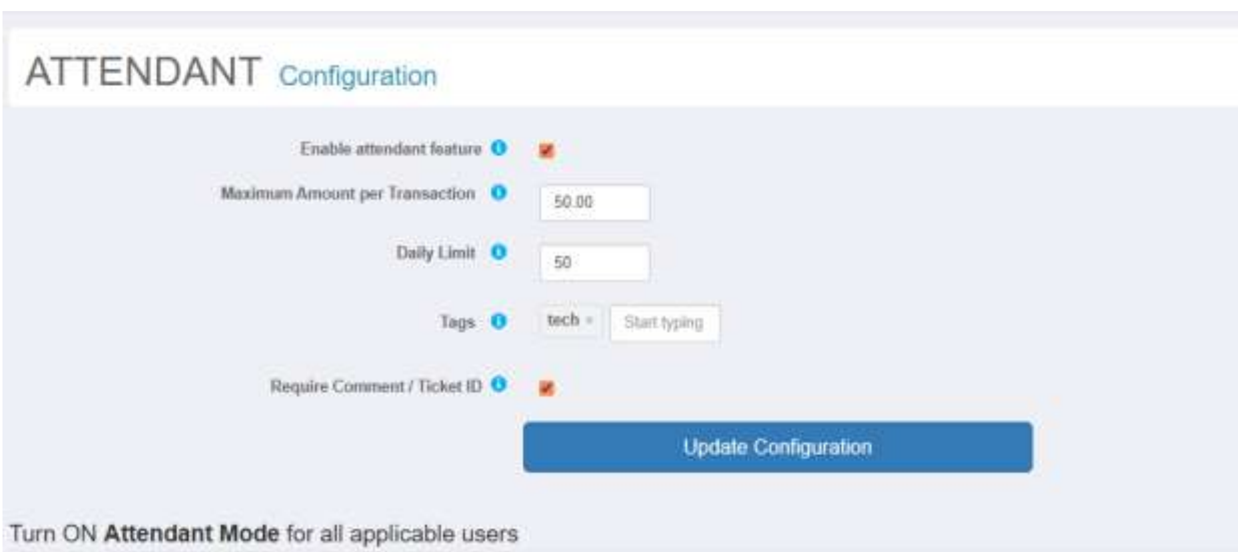

Figure 7

B. Enabling for Staff (The "Toggle")

Once the "One Time Setup" is complete, enable Attendant Mode for specific users.

Important: "Attendant Mode" can be enabled for any user role (Owner, Manager, Route Driver, etc.).

1. Access the "Users" menu (see Section 2).
2. Locate the user row.
3. Find the "Attendant Mode" column and toggle the switch to ON (green) (See the red box in ***Figure 8***).

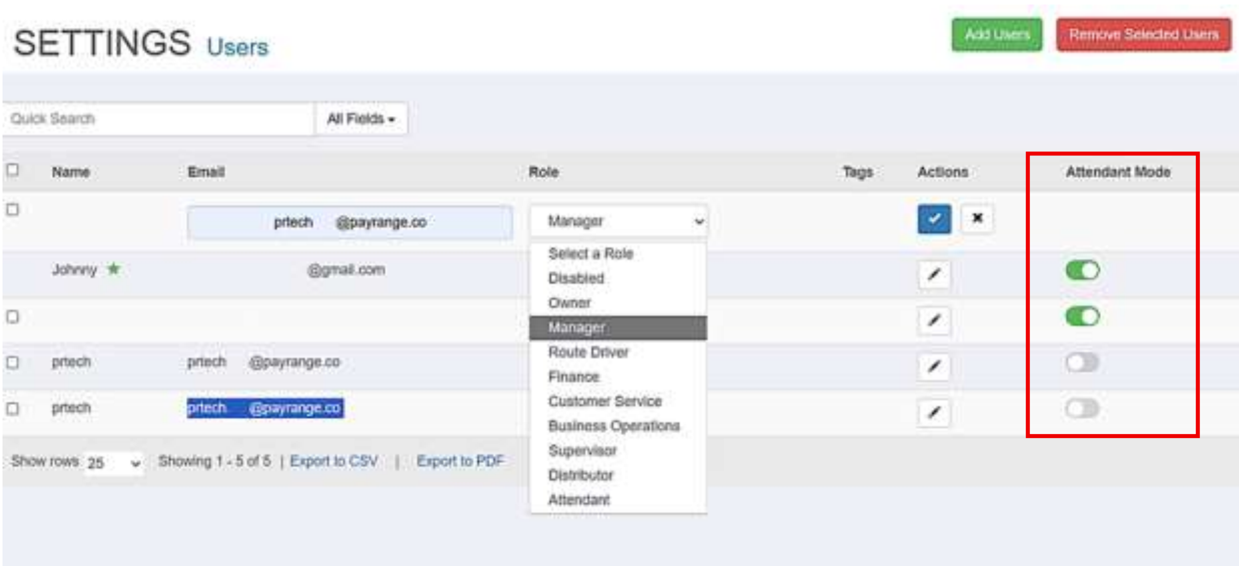

Figure 8

7. Monitoring Usage (Audit)

It is recommended to review Attendant Mode usage weekly to prevent misuse.

1. Click "ATTENDANT" in the left sidebar
2. Select "Activity" from the sub-menu (see ***Figure 9***).
3. Select the user to review by clicking the link in the "Activity" column.
4. A report will populate for the selected individual.

- Use the date selector in the upper-right corner to filter activity (see ***Figure 10***).
- Below the graph, detailed transaction information is displayed, including:
  - Transaction location
  - Attendant user comments
  - Transaction amount
  - Device ID

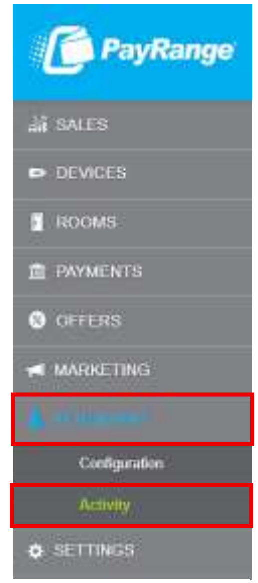

Figure 9

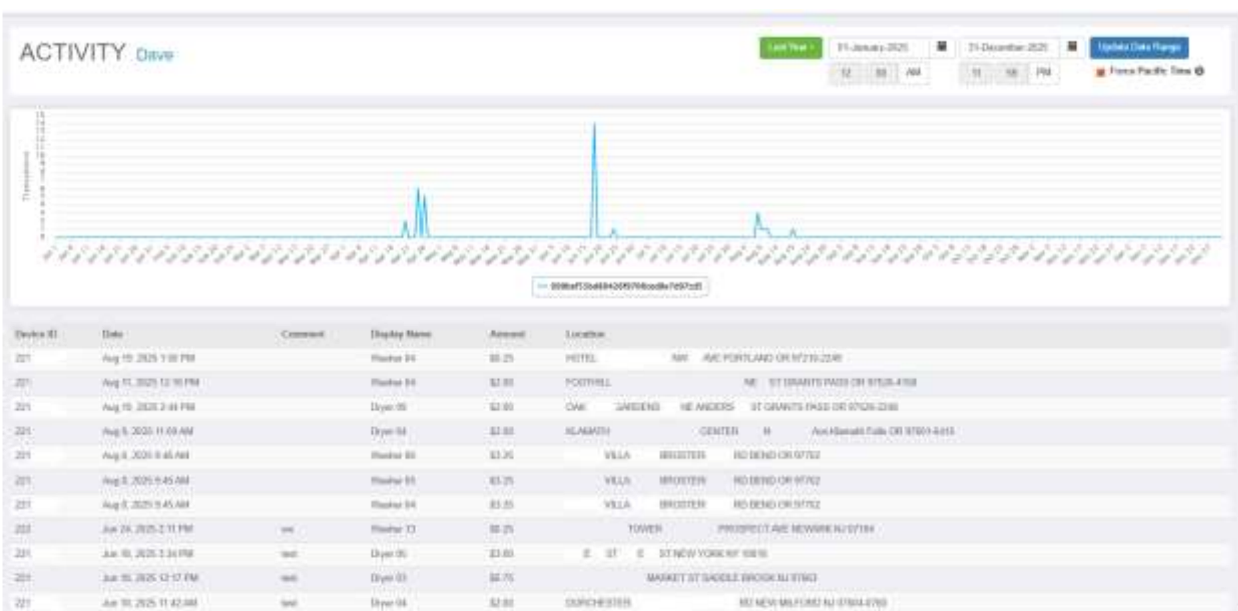

Figure 10