»efs
Slipstream financial services
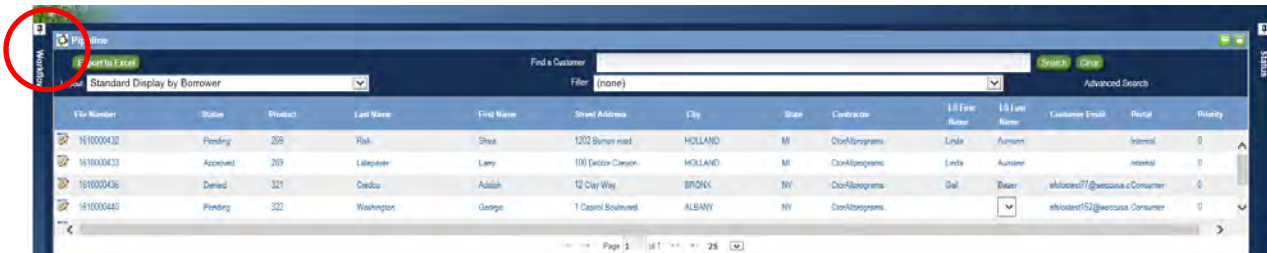
EFS Contractor Portal :
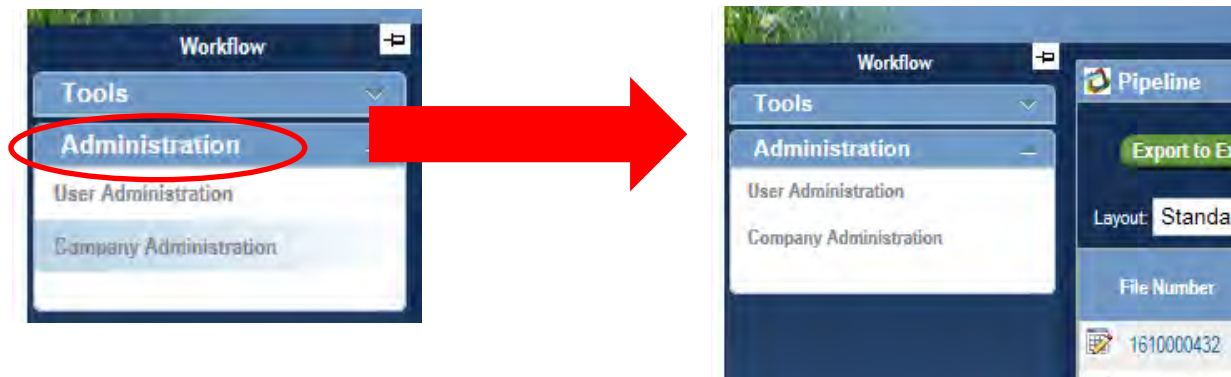## Administrator Functions

Using the Contractor Portal: Administrator Functions

To access administrator functions, log in to the portal using your assigned login information.

Click on the pin icon in the upper left hand corner to open the Workflow sidebar.

Next, click on the Administration link.
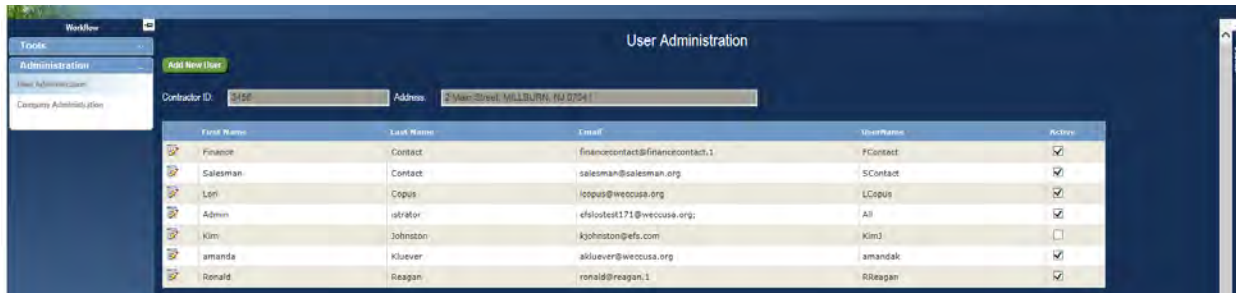

Company Administration Tab

Click on Company Administration to see/edit your address and phone number on file with EFS. Any changes made here will automatically update the contact information maintained by EFS.

To update information, simply click in the text field you wish to update and make any necessary changes. As soon as you leave this screen, the information will be updated with EFS.
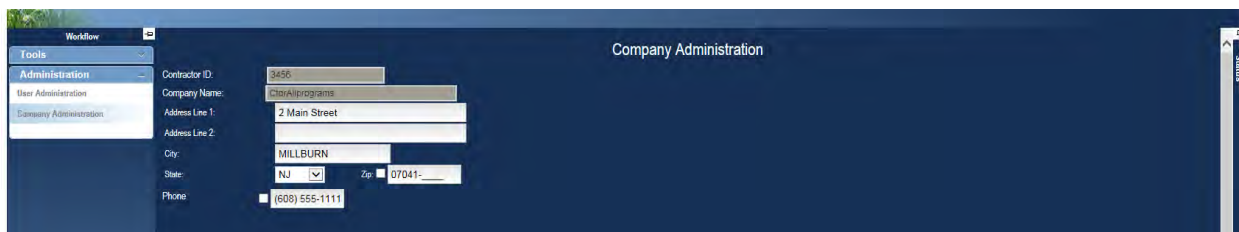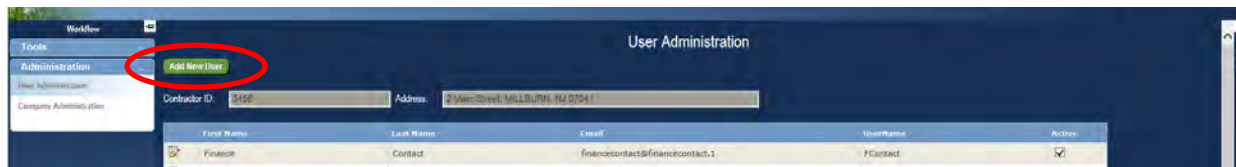
User Administration Tab

Click on User Administration to add, edit, and disable users assigned to your company. The standard view will show each user's first and last name, email address, and username. It also shows whether or not they are currently an active user.
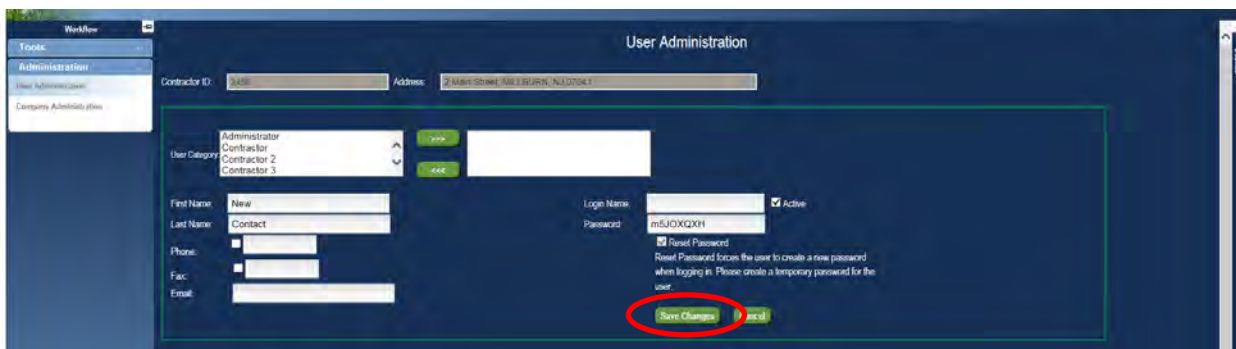

Adding a New User

To add a new user, click on Add New User at the top of your screen.

Complete each field with the necessary information and click Save Changes once finished (see image below). The system will automatically generate a login name and password for the user. If you wish to edit either of these fields, you may do so by removing the text and adding the desired information.

Click the checkboxes next to the phone and fax numbers to remove the standard formatting for phone and fax numbers.

The system defaults to asking the user to reset his/her password when logging in for security purposes. Please be sure to write down the temporary password that appears to provide to the user.

After you click Save Changes, your newly-created user will be visible in the standard view.
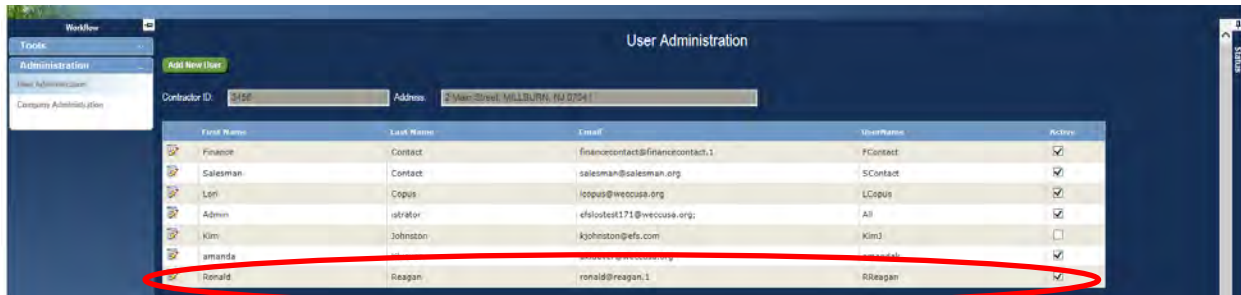
Editing an Existing User

To edit an existing user, click on the edit icon for the user you wish to modify.

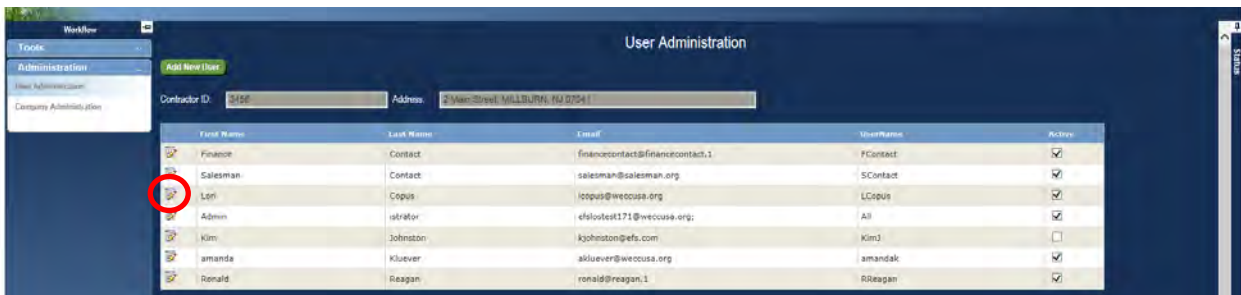From here, you can edit the user's first and last name, phone number, fax number, and email address. You cannot modify the login name. You can also reset a password for a user or make them inactive by clicking the appropriate checkbox on this screen.

Once the edits are complete, simply click Save Changes and you will return to the standard view.
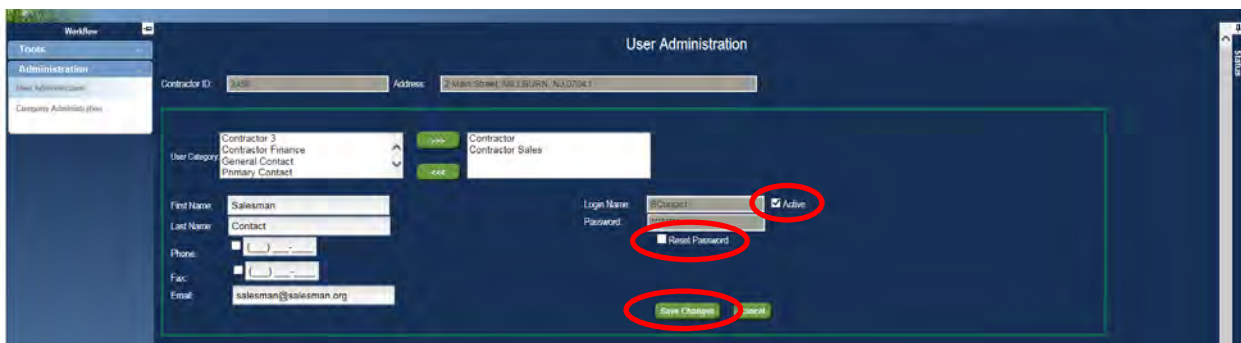
You can disable a user by clicking the active checkbox for the user in the standard view. If the box is checked, the user is active; if unchecked, the user is inactive.

Automated Notification Emails

To allow multiple individuals in your organization to receive the automated email notification from our system, start by clicking on User Administration. Then enter the email addresses of the individuals who should receive the emails, separated by a semi-colon.

For example: andres@contractor.com; sue@contractor.com; tom@contractor.com should be entered in the email address field. All automated notifications will now go to those email addresses. Recipients can be added at any time.
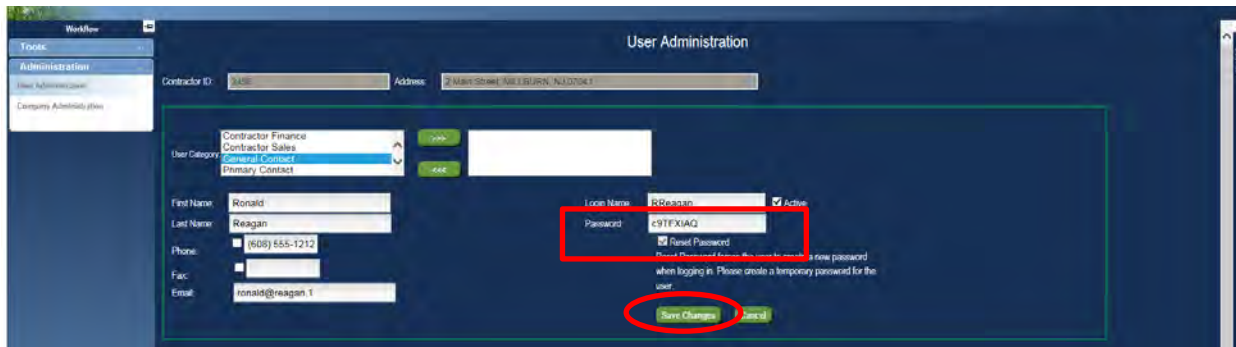

Resetting a Password

Click User Administration. Then click the edit icon next to the user for whom you need to reset the password.

From there, check the box for Password Reset. This will cause a temporary password to generate, which should be written down and provided to the user. Then click the Save Changes button.

The next time the user needs to log in, they will need to use the temporary password and will then be forced to reset their password.