

How do I set up an Agent

An agent is a user account created for people who will be logging in to SagePay. The Agent information will include an Agent Name and password details.

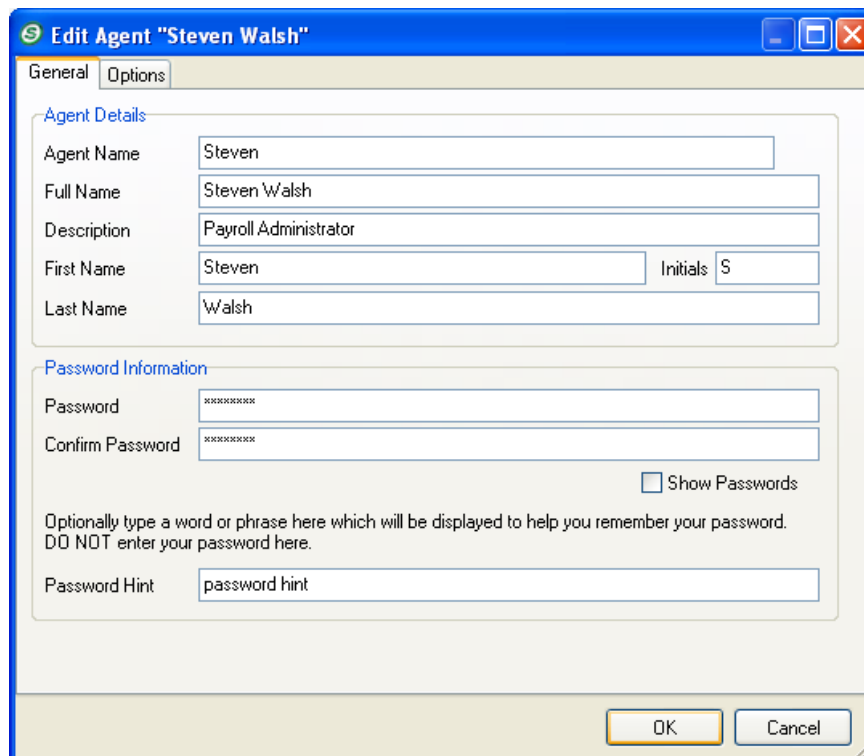
Each person who works on the system has his or her own agent code. You will therefore create and remove agents from the system.

In a new company database when SagePay is installed, the agent name is "Admin". The agent name is not case sensitive - you can enter "admin" or any combination of upper case and lower case letters.

The password for this agent will also be "Admin", it is case sensitive and begins with a capital "A". All passwords that you subsequently set up for agents will be case sensitive.

Adding an Agent

- 1 To access Agents from the menu, select [Administration](#) > [Agents](#).



The screenshot shows a dialog box titled "Edit Agent 'Steven Walsh'". It has two tabs: "General" (selected) and "Options". Under "Agent Details", there are fields for Agent Name (Steven), Full Name (Steven Walsh), Description (Payroll Administrator), First Name (Steven), Last Name (Walsh), and an Initials field (S). Under "Password Information", there are fields for Password and Confirm Password (both masked with asterisks), a "Show Passwords" checkbox, and a Password Hint field (password hint). At the bottom right are "OK" and "Cancel" buttons.

In the Agent Details Section:

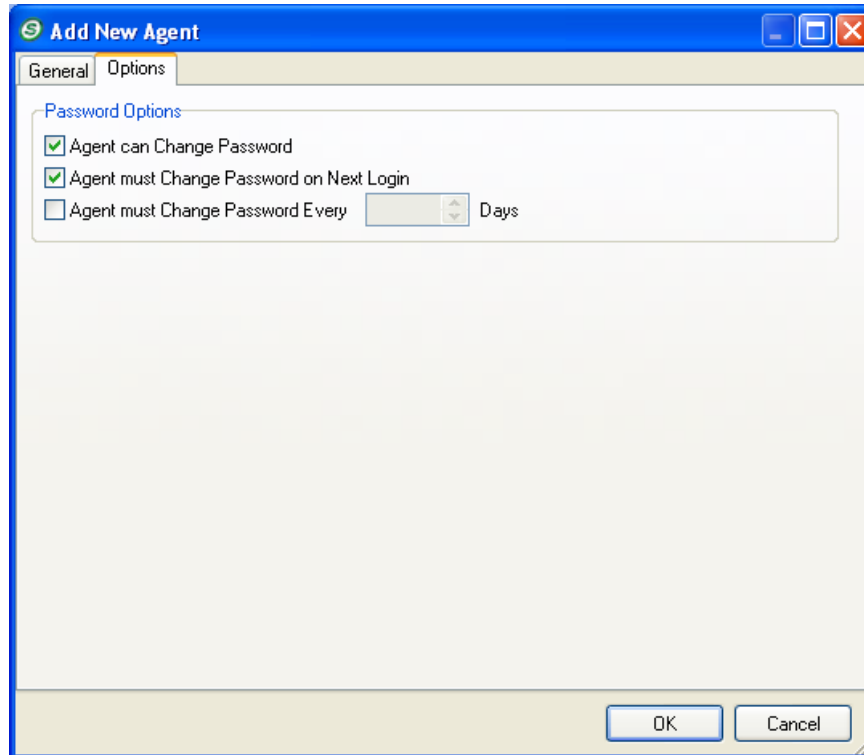
- 2 Enter the Agent Name. The **Agent Name** is the unique name an agent (user) will use to login in to SagePay. The Agent Name is an alphanumeric field of up to 20 characters and it may contain spaces. If you insert a space in the Agent Name it must be entered when the agent is logging in. You can change this name at any time and use the combination of letters and numerals required.

- 3 Enter the **Full Name** of the agent, up to 60 characters. Any text entered before the first space will auto-populate the **First Name** field. Any text after the first space entered will auto-populate the **Last Name** field. e.g. If you enter "**Sarah Applegate**", Sarah is displayed in the First Name field and Applegate is displayed in the Last Name field. This means that if you want to include any middle names in the **Full Name** field, you have to overwrite the contents of the **Last Name** field.
- 4 Enter a **Description** for the Agent. This may be a title or job function with respect to SagePay.
- 5 The **First Name** field is populated automatically when you enter a name in the Full Name field. You can change the value in this field later and it will not be reflected in the **Full Name** field.
- 6 The **Initials** field is populated automatically from the Full Name field. You can change the value in this field but it will not be reflected in the Full Name field.
- 7 The **Last Name** field is populated automatically from the Full Name field. You can change the value in this field but it will not be reflected in the Full Name field.

In the Password Information Section:

- 8 Enter the agent **Password** in this field. Passwords can be a minimum of 1 and up to a maximum of 12 alphanumeric characters. They are case sensitive and you must enter the password with the exact case. Any combination of letters and numbers may be used. Only asterisks will be displayed on the screen when you type the password unless you have ticked the **Show Passwords** check box.
- 9 SagePay requires that you enter the exact password you typed into the **Password** field into the **Confirm Password** field. Only asterisks will be displayed on the screen when you type the password unless you have ticked the **Show Passwords** checkbox.
- 10 Tick the **Show Passwords** checkbox if you want the passwords to be displayed in the **Password** and **Confirm Password** field. If this is not selected, password characters are displayed as asterisks.
- 11 Use the **Password Hint** field if you want to store a hint for the password, that is a word or phrase that will be displayed to help you remember the password. Do not enter the actual password in the **Password Hint** field. The password hint will be displayed in the error message if the agent types in their password incorrectly.

12 Select the **Options** tab.



13 You can allow agents to change their passwords. Furthermore, you can force an agent to change a password at the time of creation and/or on a regular basis.

14 Click on the **OK** button to save the Agent details.