User manual for administration of the lunch benefit

This application offers tools and settings for managing employees, ordering charging, managing invoices and the like linked to the lunch benefit via the Epassi card.

The administration portal can be accessed via: admin.epassi.se

Log on

Use your email address and password to log in to the portal.
The first time you log in, you will be asked to change your password, a link for this will be sent to your registered email. Didn't you get the email? Check your spam if it has ended up there, otherwise contact us.

Password change

Should the password be forgotten, it is possible to reset the password via the login page, by clicking on the link for "Forgot password?". After clicking on the link, you will be met by the "Reset Password" screen. You will then need to fill in the e-mail address associated with the account, whereupon an email will be generated to the email address with a link to recover password. By clicking on the link sent in the email, you will have the opportunity to change your password. When the password reset link is used, the link is consumed and cannot be used again.

Summary

After logging in, you will be met by the Overview page. Here you will find a summary of the latest invoices, the most recent invoiced amount, and the number of cardholders included in the selected unit.

The selected device appears in the main menu, under your name. To change the device, click on the device name and select "Change device". It is possible to select all devices at the same time.

User menu

In the user menu, you can; change your language (Swedish or English), change your device, change company settings (currently only the company address), and sign out.

Employees

All employees can be managed based on the "Employees" page. You can access the page through the main menu and the option "Employees" – "Manage employees". The list of employees is based on the device selected (in the right corner of the menu). If you have only one device, all employees appear in the list.

From here, it is possible to search for employees, perform the necessary actions (such as changing employment details, moving to another device, disabling) and adding new employees.

Add new employees and order cards

First, make sure that the correct device is selected in the main menu. If you only have one device, just follow the instructions below. Click on the "Add" button to begin the process of adding a new employee to the system.

Once you have filled in the employee's social security number, first name, last name and address will be retrieved from the Swedish Tax Agency's database and filled in automatically. It may be that the information is old, then make sure that you manually fill in the correct information. When the information has been filled in and after you have clicked on the button "Add employee" the person is added to the system and a card is automatically ordered to them.

Add multiple employees and order cards

In the main menu, go to Employees and select Import employees. Here it is possible to upload a file with all new employees, see a list of available devices and their ID (to use in the file being imported).

Below the file import surface, you'll see the history and results of previous imports.

In order to add multiple employees at the same time, you need to create a file according to the template available on the import page and upload the file to the system via the feature available on the page. As soon as the file is imported, the employees will be added to the system and cards will be ordered to them (provided that they are not previously in the system).

Edit employees

In order to change an employee's details, you need to click on the "Edit" button for the selected employee on the employee page.

Move employee between devices

It is possible to move employees from one device to another (within the same company) from "Edit Employee". A new device must be selected on the page, and after the changes are saved, the employee will belong to their new device.

All information except personal data (first name, last name, social security number) can be changed on this page. If personal data needs to be changed for an employee, it can only be done by ePassis customer support.

Disable employee (for longer leave)

Go to "Employees" in the main menu and click on "Manage employees". If you can't find the person directly, search for the employee's social security number or name in the search box. Then click on the three dots on the right and select Disable. Then select a from and to date that the employee should not receive charging. Tap Save.

During this period, the employee will not be on the charging list and thus not be able to get charges on their card during that period.

NB! Keep in mind that until the "from date" kicks in, the employee can still receive charges against their card. It takes a day for the employee to become active. For example, if you choose to disable the employee during the period 2021-06-01-2021-06-30, the employee will be activated 2021-07-01.

Remove employee

Go to "Employees" in the main menu and click on "Manage employees". If you can't find the person directly, search for the employee's social security number or name in the search box. Then click on the three dots on the right and select Delete. Select the date when the employee will be deleted. Then tap Save.

The employee will then be deleted from your company, but still remains in our system. The card can still be used if the balance remains on the card. The balance has no expiration date.

Remember to go through the list of employees before the end of the year (and the creation of the annual fee invoice) to ensure that it is the right employees who are covered by the annual fee invoice.

Charges

Create charging

Choose which device you want to order charges to at the top left of the main menu (if you only have one company, just follow the steps below).
Go to "Charges" in the main menu and select "new charging". Select the date you want the cards to load in the calendar. NOTE: The charging date must be at least 5 days ahead from today's date. Then tap "Next Step" at the bottom. Now you will see a list of all the active people that are under your company & their different charging choices.

Check through to make sure those on the list are eligible to charge for the next month before moving on. If an employee is not eligible, simply zero the charging amount. Then tap "Next Step"

In the next step, you will get a summary of the total number of cards & sums that the invoice will apply to. If everything looks good, tap "Create invoice".
NOTE: After you press "Create invoice" and the page stands and thinks, do not click on "Create invoice" again because then you create a double invoice.

If something doesn't look good, press "Cancel" and redo the steps to correct what has gone wrong.

Load cards for individual employees

Select the device you want to order charges to in the top left corner of the main menu. (If you only have one company, just follow the steps below). Go to "Charges" in the main menu and select "new charging". Select the date you want the cards to load in the calendar, and then tap "next page".
NOTE: The charging date must be at least 5 days ahead from today's date.

Now go to "Filtering" to the right of the calendar and find the person you want to make a charge for. If necessary, fill in the amount manually in that box on the far right Press "Next page"

In the next step, you will get a summary of the total number of cards & sums that the invoice will apply to. If everything looks good, tap "Create invoice"
NOTE: After you press "Create invoice" and the page stands and thinks, do not click on "Create invoice" again or you create a double invoice

If something doesn't look right, press "Cancel" and redo the steps to correct what has gone wrong.

Change charging settings

Go to charges in the main menu and select "Charging Settings". The charging settings are based on the agreement made between your company and ePassi.

Here you have the option to change settings for future charges such as:

1. Change of cut-off date *(until this date, the employee can select charging on active calendar)*
2. Choice of number of months employees can receive charging
3. Block a specific month for charging
4. Change so that the employee's calendar is prefilled
1. That the loading invoice is created automatically every month

Invoices

All invoices that have ever been created are posted here. If you have multiple devices and you don't want to see all invoices created for all devices, but only for a specific device, select the device in the top left corner of the main menu. Fill in the invoice number search box to get specific information about that particular invoice.

To see detailed information about the charges, tap the three dots on the right of the current invoice. There you can see what charges the invoice contains, as well as download the invoice and specification.

Under payment status in the menu, you can see if the invoice is paid/loaded or if it is cancelled.

Support

Go to the "Support" tab in the main menu. Fill in the information requested in the questionnaire. Remember to fill in your contact details so that we can easily contact you once we have handled your case. The more information you enter in the form, the easier and faster we can resolve your case.

You can also reach us via lunchkort@epassi.se or +46 8 555 172 20

FREQUENTLY ASKED QUESTIONS

Go to the "Support" tab in the main menu. Tap "Open FAQ". Here you will find frequently asked questions and answers. If you still have questions, please contact us.