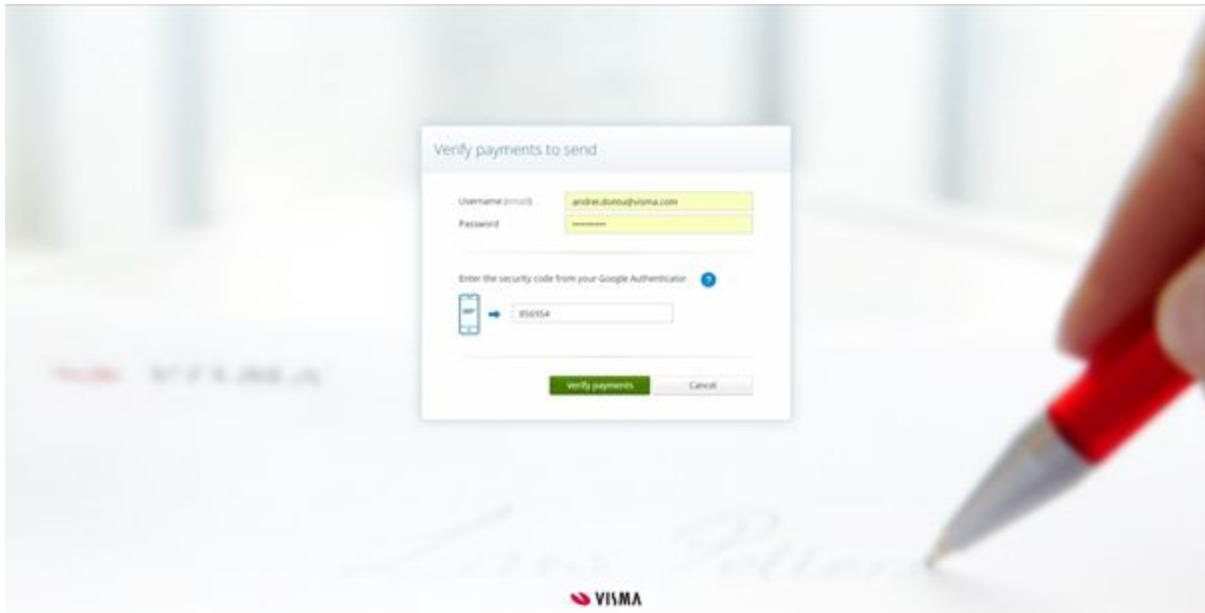


AutoPay 2FA



Quick guide

AutoPay 2FA increases the security with your payment handling by requiring an extra security factor for uploading and approving payments in AutoPay.

In our current version we use Google Authentication code in addition to the traditional username and password.

1. How to set up your company and users

1.1 Enable 2FA for a company

Visma.net Admin ▾ Start page Users and roles Companies Configuration

Companies Company groups

Companies Testforetaket For Æøå As X

Company details

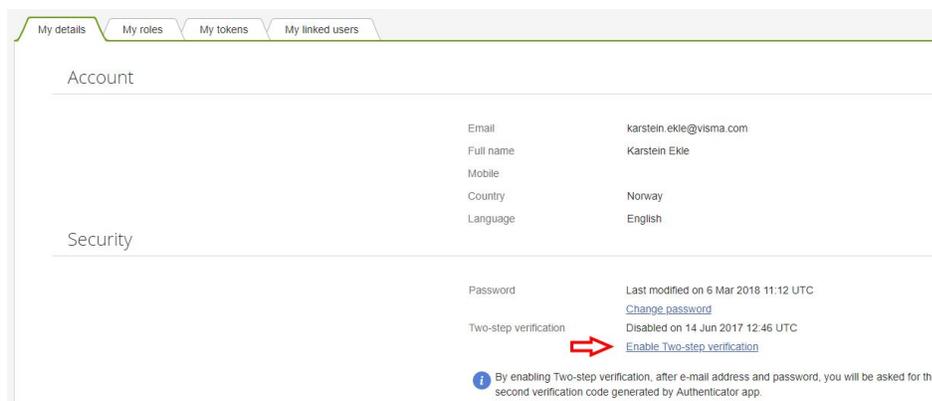
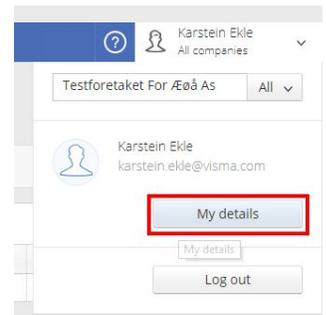
*Company name	Testforetaket For Æøå As	Email address	test@twofa.com
*Country	NORWAY ▾	Phone	
*Organization number	911642190	Description	
*Address	Oslo +	Company ID	200221306
*Postal code	1234	Key code	Show
*City	Oslo		<input checked="" type="checkbox"/> Enable two-step verification for Visma.net AutoPay ⓘ

Demo company

Go to "Visma.net Admin", chose "Companies", find your company and edit. Check "Enable two-step verification for Visma.net AutoPay".

1.2 Enable 2 step verification for the user

Click on your user in the upper right corner of your page. Then click the button "My details".



Click "Enable Two-step verification" for your user and follow the steps you are asked to do.

You also need to download the "Google Authentication" app to your smartphone during this process.

1.3 Enable roles for the user

There are two roles you may need to set up to use 2FA in AutoPay:

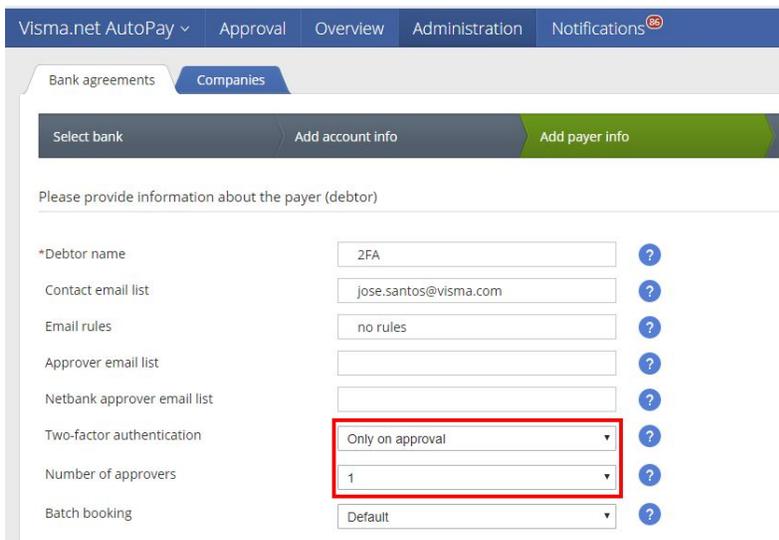
1. **AutoPay Approver**
You need this role to be able to approve payments in AutoPay.
2. **AutoPay Uploader**
You need this role if you chose to approve on upload in your agreement settings (see 1.4).

See separate documentation for Visma.net Admin on how to add users and roles.

1.4 Defining the level of 2FA for your bank agreement



Go to “Visma.net AutoPay” and “Administration” to find the overview of your current bank agreements. Pick the one you would like to set up and click the pencil icon to edit.



The screenshot shows the 'Add payer info' form. The 'Two-factor authentication' dropdown is highlighted with a red box and set to 'Only on approval'. Other fields include Debtor name (2FA), Contact email list (jose.santos@visma.com), Email rules (no rules), Approver email list, Netbank approver email list, Number of approvers (1), and Batch booking (Default).

Go to the “Add payer info” tab.

There are two settings you can change for 2FA:

1. **Two-factor authentication**

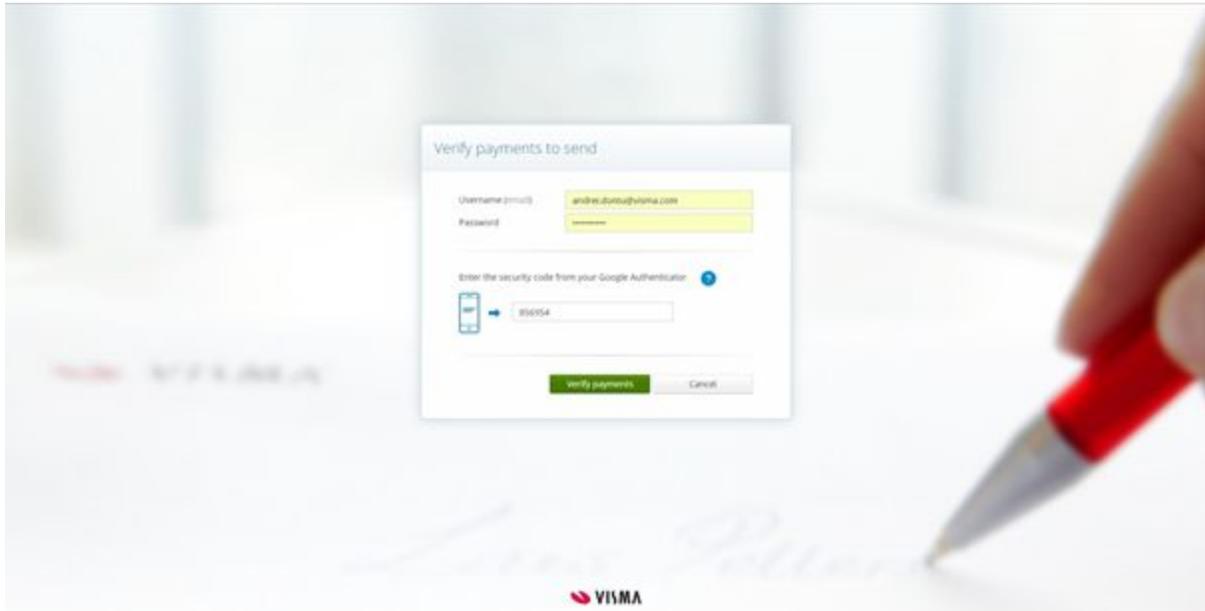
Here you have three options:

- Only on approval - *Only the approver uses 2FA*
- Only on upload - *Only the one sending payments from ERP uses 2FA*
- Both on upload and approval

2. **Number of approvers**

How many approvers do you need in AutoPay (Not counting the uploader). Please note that together with 2FA you will now be able to choose zero approvers in AutoPay and approve only on upload. (Then please note that you will not see any warnings AutoPay gives about your payments.)

2. Using 2FA with AutoPay



You will after this be requested to enter your username and password + the Google Authentication code from your smartphone to upload and approve payments in Visma.net AutoPay.

You may choose to save email and password in your browser, but you must always enter the Google Authentication code. (We recommend also that you don't save the password in your browser.)