

## Users and merchants roles

### Overview

Each user is created with a certain role(s) which will provide a specific set of permissions. Users will always be created in an organization, as this will determine the access scope of the user. If the user is created in a top-level organization, they will have access to all organizations below. In case the user is boarded into a lower-level organization, the scope will be reduced to that specific organization.

You can view and search for users in your organization by name or email address on the **Administration -> Users** tab, depending on your access level. **Merchant admins can also add new users** on the **Administration -> Users** tab.

### Roles and permissions

Below are presented the merchant roles and the permissions levels of merchant users in Verifone Central:

- **Merchant Admin** - This is an administrative role which can onboard new users & updates blocking rulesets. It is the Verifone Cloud Services account contact person providing Portal access to your employees. An organization may have more than one Merchant Admin.
- **Merchant Order Admin** - This role is assigned to users who can have permission to create, view and modify orders with Order Service and Boarding UI. It is complimentary to the MERCHANT\_ADMIN role, meaning this can be added to a user which also has the MERCHANT ADMIN role.
- **Merchant Reviewer** - This role is an external viewing role. It will grant viewing access for all dashboards on the Portal but restricts the user from performing actions.
- **Merchant Supervisor** - This role is assigned to the owner of the organisation. This user is able to use all payment tools and perform all payment actions. It has read access for the *Transaction* dashboard, *Organizations* list, and *Point of Interaction (POI)* list.
- **Merchant User** - This role and is granted viewing access but restricts the user from performing actions. It is ideal for call center support staff. It has read access for the *Transaction* dashboard, *Organizations* list, and *POI* list.
- **Merchant Cashier** - This role has access to the payment tools but cannot issue any refund. It has read access for the *Transaction* dashboard, *Organizations* list, and *POI* list.
- **Merchant External Partner** - This role is assigned to users which are outside of the of merchant's company/ business, but are still trusted to get access to merchant data (such as transaction data, etc.)
- **Provider White Label Manager** - This role is assigned to users which have acquired the *White Label* feature. The feature enables users to customize the layout and designs of their *Organizations* within *Verifone Central*.
- **Reseller Manager** - An external reseller employee who can create, view and mange orders at any country level within their reseller group.
- **Reseller Representative** - An external reseller user who can view the portfolio, create, view and manage orders on behalf of the country the user is in.

A user with multiple roles inherits all the rights and permissions of all assigned roles. However, the **Merchant External Partner role will overwrite the rights and permissions of the other assigned roles.**

Location in Verifone Central	Permissions	Roles
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Section	Components & features (subsection)	Merchant Admin	Merchant Order Admin	Merchant Reviewer	Merchant Supervisor	Merchant User	Merchant Cashier	Merchant External Partner	Provider White Label Manager	Reseller Manager	Reseller Representative		
Administration – Merchant Account Configuration & Onboarding	<a href="#">Organizations</a>	Create	No	No	No	No	No	No	No	No	No	No	
		Read	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	No	No	
		Update	No	No	No	No	No	No	No	No	No	No	No
		Delete	No	No	No	No	No	No	No	No	No	No	No
		Secure Card Capture	Yes	Yes	No	No	No	No	No	No	No	No	No
		Token Scope	Yes	Yes	No	No	No	No	No	No	No	No	No
	<a href="#">Payment Provider Contracts</a>	Create	No	No	No	No	No	No	No	No	No	No	No
		Read	Yes	Yes	Yes	Yes	Yes	Yes	No	No	Yes	No	No
		Update	No	No	No	No	No	No	No	No	No	No	No
		Delete	No	No	No	No	No	No	No	No	No	No	No
		See Fees	No	No	No	No	No	No	No	No	No	No	No
	<a href="#">Points of Interaction</a>	Create	No	Yes	No	No	No	No	No	No	No	No	No
		Read	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	No	No
		Update	No	Yes	No	No	No	No	No	No	No	No	No
		Delete	No	Yes	No	No	No	No	No	No	No	No	No

Section	Components & features (subsection)	Merchant Admin	Merchant Order Admin	Merchant Reviewer	Merchant Supervisor	Merchant User	Merchant Cashier	Merchant External Partner	Provider White Label Manager	Reseller Manager	Reseller Representative
<a href="#">3D Secure Contracts</a>	Create	No	No	No	No	No	No	No	No	No	No
	Read	Yes	Yes	Yes	Yes	Yes	No	No	Yes	No	No
	Update	No	No	No	No	No	No	No	No	No	No
	Delete	No	No	No	No	No	No	No	No	No	No
	Enable/Disable	No	No	No	No	No	No	No	No	No	No
	Read Password	No	No	No	No	No	No	No	No	No	No
<a href="#">Wallets</a>	Create	Yes	No	No	Yes	No	No	No	No	No	No
	Read	Yes	Yes	Yes	Yes	Yes	No	No	Yes	No	No
	Update	No	No	No	No	No	No	No	No	No	No
	Disable	Yes	No	No	No	No	No	No	No	No	No
Users	Create	Yes	Yes	No	No	No	No	Yes	No	Yes	No
	Read	Yes	Yes	Yes	No	No	No	No	Yes	Yes	No
	Update	Yes	No	No	No	No	No	No	No	Yes	No
	Delete	Yes	No	No	No	No	No	No	No	Yes	No
	Self Read	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	No
	Self Update	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	No	No
	Reset Password	Yes	No	No	No	No	No	No	No	Yes	No

Section	Components & features (subsection)	Merchant Admin	Merchant Order Admin	Merchant Reviewer	Merchant Supervisor	Merchant User	Merchant Cashier	Merchant External Partner	Provider White Label Manager	Reseller Manager	Reseller Representative	
Create API key	Yes	No	No	Yes	No	Yes	No	No	No	No		
<a href="#">Blocking Rulesets</a>	Create	Yes	No	No	No	No	No	No	No	No	No	
	Read	Yes	No	Yes	Yes	Yes	No	No	Yes	No	No	
	Update	Yes	No	No	No	No	No	No	No	No	No	
	Delete	Yes	No	No	No	No	No	No	No	No	No	
<a href="#">Notification Service</a>	Create	Yes	Yes	No	Yes	No	No	No	No	No	No	
	Read	Yes	Yes	No	Yes	No	No	No	No	No	No	
	Update	Yes	Yes	No	Yes	No	No	No	No	No	No	
	Disable	Yes	Yes	No	Yes	No	No	No	No	No	No	
<a href="#">Checkout Themes</a>	Create Theme	No	No	No	Yes	No	Yes	No	No	No	No	
	View	No	No	No	Yes	No	Yes	No	No	No	No	
	Read	No	No	No	Yes	No	Yes	No	No	No	No	
	Update	No	No	No	Yes	No	Yes	No	No	No	No	
	Delete	No	No	No	Yes	No	Yes	No	No	No	No	
<a href="#">Audit Log</a>	Create	No	No	No	No	No	No	No	No	No	No	
	Read	Yes	No	No	No	No	No	No	No	No	No	
	Update	No	No	No	No	No	No	No	No	No	No	
	Delete	No	No	No	No	No	No	No	No	No	No	
<b>Payment Tools</b>	<a href="#">Virtual Terminal</a>	Access	No	No	No	Yes	No	Yes	No	No	No	No

Section	Components & features (subsection)	Merchant Admin	Merchant Order Admin	Merchant Reviewer	Merchant Supervisor	Merchant User	Merchant Cashier	Merchant External Partner	Provider White Label Manager	Reseller Manager	Reseller Representative
View	No	No	No	Yes	No	Yes	No	No	No	No	
Create & Initiate payment / void payment	No	No	No	Yes	No	Yes	No	No	No	No	
Capture payment / refund / cancel	No	No	No	Yes	No	No	No	No	No	No	
<a href="#">Pay by Link</a>	Access	No	No	No	Yes	No	Yes	No	No	No	No
	View PBL list	No	No	No	Yes	No	Yes	No	No	No	No
	Create link	No	No	No	Yes	No	Yes	No	No	No	No
	Reenable link	No	No	No	Yes	No	Yes	No	No	No	No
	Disable link	No	No	No	Yes	No	Yes	No	No	No	No

<https://verifone.cloud/docs/verifone-central/verifone-central/manage-your-account/administration/users-and-merchants-roles>

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Section	Components & features (subsection)	Merchant Admin	Merchant Order Admin	Merchant Reviewer	Merchant Supervisor	Merchant User	Merchant Cashier	Merchant External Partner	Provider White Label Manager	Reseller Manager	Reseller Representative		
Reporting & Analytics	<a href="#">Orders/Transactions Reports</a>	Access	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	No	
		View transaction list	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	No
		Transaction details: history, actions, details, customer, documents	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	No	No
		Export CSV	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	No	No
		Refund	No	No	No	Yes	No	No	No	No	No	No	No
		Capture	No	No	No	Yes	No	No	No	No	No	No	No
		Void	No	No	No	Yes	No	Yes	No	No	No	No	No
		Access Receipts	Yes	Yes	No	Yes	No	Yes	No	No	No	No	No
	Void Capture	No	No	No	Yes	No	No	No	No	No	No	No	
	<a href="#">Settlements</a>	Read	No	No	Yes	Yes	Yes	No	No	Yes	No	No	

Section	Components & features (subsection)	Merchant Admin	Merchant Order Admin	Merchant Reviewer	Merchant Supervisor	Merchant User	Merchant Cashier	Merchant External Partner	Provider White Label Manager	Reseller Manager	Reseller Representative	
Monthly Invoice Summary	Read	Yes	Yes	No	Yes	No	No	No	No	No	No	
<a href="#">3D Secure Authentications</a>	Access	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	No	No	
	View	Yes	Yes	Yes	Yes	Yes*	Yes	No	Yes	No	No	
*Note: Merchant users can only access the 3-D Secure Authentications of their organization and cannot access the 3-D Secure Authentications of their sub-organizations.												
<a href="#">Report Scheduler</a>	View	Yes	Yes	No	Yes	Yes	No	No	No	No	No	
<a href="#">Generated Reports</a>	View	Yes	Yes	No	Yes	Yes	No	No	Yes	No	No	
Payout Report	View	Yes	Yes	No	Yes	No	No	No	No	No	No	
<a href="#">Payments/ Analytics/ Dashboard</a>	Access	Yes	No	No	Yes	Yes	No	No	Yes	No	No	
	View	Yes	No	No	Yes	Yes	No	No	Yes	No	No	
<b>Device Management</b>	<a href="#">Devices Report</a>	View	Yes	Yes	No	Yes	Yes	No	No	Yes	Yes	No

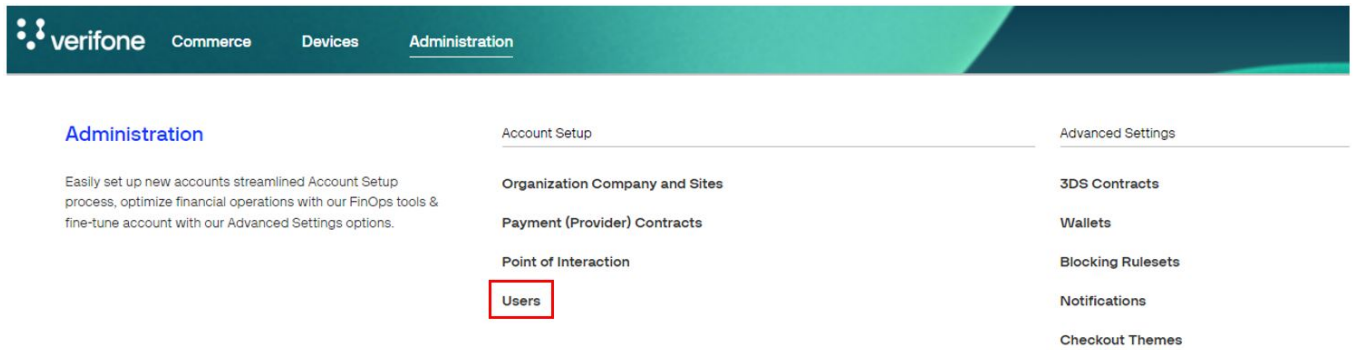
Section	Components & features (subsection)	Merchant Admin	Merchant Order Admin	Merchant Reviewer	Merchant Supervisor	Merchant User	Merchant Cashier	Merchant External Partner	Provider White Label Manager	Reseller Manager	Reseller Representative	
<a href="#">Chain of Custody</a>	View	Yes	Yes	No	Yes	Yes	No	No	Yes	Yes	No	
	Create / Edit	Yes	Yes	No	Yes	Yes	No	No	Yes	Yes	No	
Boarding	<a href="#">Place orders</a>	Create	No	Yes	No	No	No	No	No	No	Yes	Yes
		View	No	Yes	No	No	No	No	No	No	Yes	Yes
		Update	No	Yes	No	No	No	No	No	No	Yes	Yes
Customize Layout	<a href="#">White Label</a>	Manage	No	No	No	No	No	No	No	Yes	No	No

## Creating new users

Here is how you can create a new user:

Only users with **Merchant Admin** access can set up new users, as per the above table.

1. Select **Administration > Users**.



2. Click **Add New User**.

<https://verifone.cloud/docs/verifone-central/verifone-central/manage-your-account/administration/users-and-merchants-roles>

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[< Users](#)

## Add new user

### General details

First name

Middle name (Optional)

Last name (Optional)

Email

Interface language

### Access rights

Organization

#### Merchant roles

- Merchant User  
A viewing role. This user role will grant viewing access, but restricts the user from performing actions.
- Merchant Admin  
Administrative role which can on-board new users & update blocking rulesets.
- Merchant Supervisor  
The owner of the organization, this user will be able to use all payment tools and perform all payment actions.
- Merchant Cashier  
This role will have access to the payment tools, but can not issue any refund.
- Merchant Reviewer  
An external viewing role. This user role will grant viewing access, but restricts the user from performing actions.
- Merchant External Partner

[Cancel](#) [Save](#)

3. Complete the following fields:
- Full name
  - Email address

<https://verifone.cloud/docs/verifone-central/verifone-central/manage-your-account/administration/users-and-merchants-roles>

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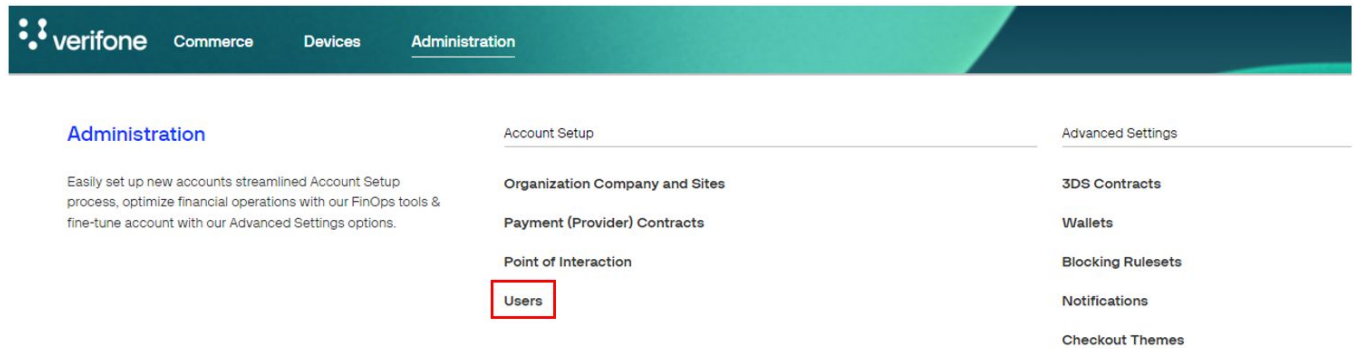
- o Organization
- o Access rights - determines the level of access needed for transaction tasks. See the [Roles and permissions](#) section above for more details

The new user will receive an email inviting them to set up a password to activate their account.

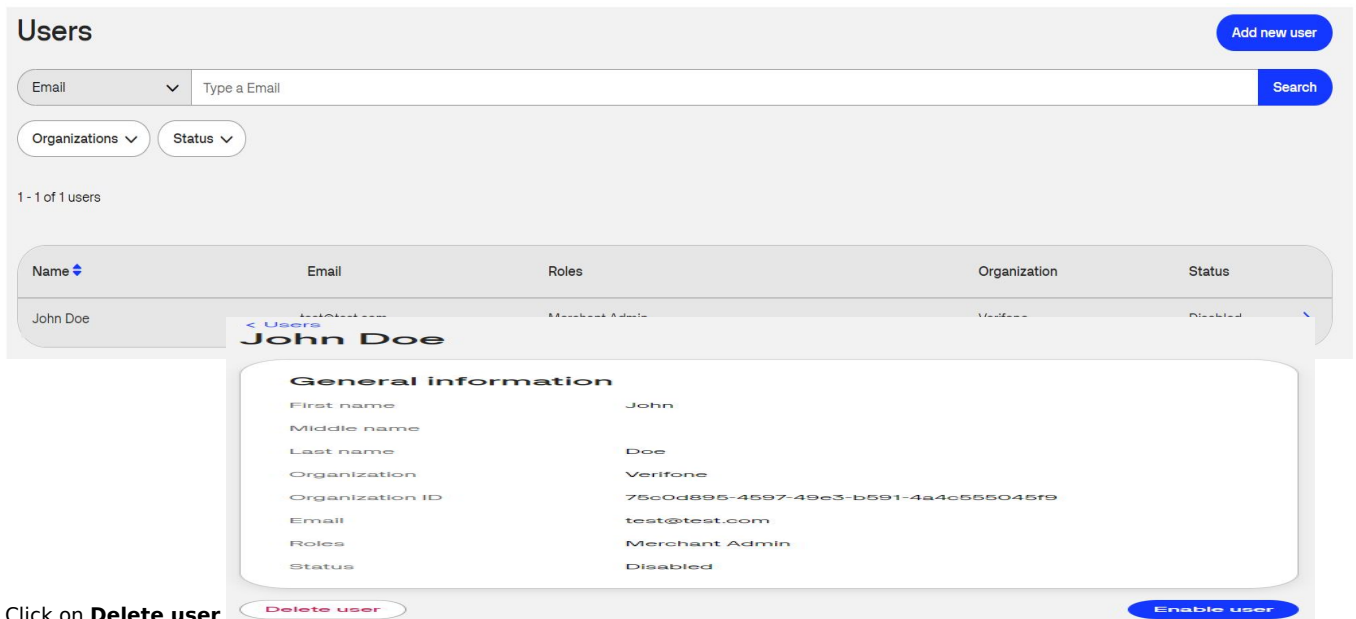
## Deleting a user

Only users with **Merchant Admin** access can delete users, as per the above table.

1. Select **Administration > Users**.



2. Select the needed user from the user list.



3. Click on **Delete user**.

Only users having the **Disabled** status can be deleted.

- A confirmation message will be displayed. Select a reason for the deletion and click on **Delete user**. If you don't want to delete the user select the **Keep user** button.

### Delete user ✕

Are you sure you want to delete user **John Doe**? This will permanently delete their account.

Please select a reason for deletion:

This user is no longer required.

Wrong email address has been added.

Others

**Keep user** **Delete user**

- Deleted users will still be visible in the user list, with the status *Deleted*.

## Users Add new user

Email  Type a Email Search

Organizations  Status (+1)  Clear filter

Name <input type="text"/>	Email	Roles	Organization	Status
John Doe	-	-	Verifone	Deleted