



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

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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 that can onboard new users and update 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 have permission to create, view, and modify orders with Order Service and Boarding UI. It is complementary to the MERCHANT_ADMIN role, meaning this can be added to a user who 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 organization. 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 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 who are outside of the 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 who 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 manage 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			Roles					
Section	Components & features (subsection)	Permissions	Merchant Admin	Merchant Order Admin	Merchant Reviewer	Merchant Supervisor	Merchant User	Merchant Cashier
Administration — Merchant Account Configuration & Onboarding	Organizations	Create	No	No	No	No	No	No
		Read	Yes	Yes	Yes	Yes	Yes	Yes
		Update	No	No	No	No	No	No
		Delete	No	No	No	No	No	No
		Secure Card Capture	Yes	Yes	No	No	No	No
		Token Scope	Yes	Yes	No	No	No	No
	Payment Provider Contracts*	Create	No	No	No	No	No	No
		Read	Yes	Yes	Yes	Yes	Yes	No
		Update	No	No	No	No	No	No
		Delete	No	No	No	No	No	No
		See Fees	No	No	No	No	No	No
	<i>*Note: For Surcharge configuration details and merchant role permissions, check the Surcharge document.</i>							
	Points of Interaction	Create	No	Yes	No	No	No	No
		Read	Yes	Yes	Yes	Yes	Yes	Yes
		Update	No	Yes	No	No	No	No
		Delete	No	Yes	No	No	No	No
		Create	No	No	No	No	No	No
	3D Secure Contracts	Read	Yes	Yes	Yes	Yes	Yes	No
		Update	No	No	No	No	No	No
		Delete	No	No	No	No	No	No
		Enable/Disable	No	No	No	No	No	No
	Wallets	Read Password	No	No	No	No	No	No
		Create	Yes	No	No	Yes	No	No
		Read	Yes	Yes	Yes	Yes	Yes	No
		Update	No	No	No	No	No	No

Location in Verifone Central					Roles			
Section	Components & features (subsection)	Permissions	Merchant Admin	Merchant Order Admin	Merchant Reviewer	Merchant Supervisor	Merchant User	Merchant Cashier
Disable	Yes	No	No	No	No	No	No	No
	Create	Yes	Yes	No	No	No	No	Yes
	Read	Yes	Yes	Yes	No	No	No	No
	Update	Yes	No	No	No	No	No	No
	Delete	Yes	No	No	No	No	No	No
Users	Self Read	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	Self Update	Yes	Yes	No	Yes	Yes	Yes	Yes
	Reset Password	No	No	No	No	No	No	No
	Create API key	Yes	No	No	Yes	No	No	No
	Create/ edit/ view organization group	Yes	No	No	No	No	No	No
Blocking Rulesets	Create	Yes	No	No	No	No	No	No
	Read	Yes	No	Yes	Yes	Yes	No	No
	Update	Yes	No	No	No	No	No	No
Notification Service	Delete	Yes	No	No	No	No	No	No
	Create	Yes	Yes	No	Yes	No	No	No
	Read	Yes	Yes	No	Yes	No	No	No
	Update	Yes	Yes	No	Yes	No	No	No
Checkout Themes	Disable	Yes	Yes	No	Yes	No	No	No
	Create Theme	No	No	No	Yes	No	Yes	No
	View	No	No	No	Yes	No	Yes	No
	Read	No	No	No	Yes	No	Yes	No
Audit Log	Update	No	No	No	Yes	No	Yes	No
	Delete	No	No	No	Yes	No	Yes	No
	Create	No	No	No	No	No	No	No
	Read	Yes	No	No	No	No	No	No
Payment Tools	Update	No	No	No	No	No	No	No
	Delete	No	No	No	No	No	No	No
	Access		No	No	No	Yes	No	Yes
	View		No	No	No	Yes	No	Yes
	Virtual Terminal	Create & Initiate payment / void payment	No	No	No	Yes	No	Yes

Location in Verifone Central					Roles			
Section	Components& features (subsection)	Permissions	Merchant Admin	Merchant Order Admin	Merchant Reviewer	Merchant Supervisor	Merchant User	Merchant Cashier
Pay by Link	Capture payment/ refund/ cancel	No	No	Yes	No	No	No	No
	Access	No	No	No	Yes	No	Yes	No
	View PBL list	No	No	No	Yes	No	Yes	No
	Create link	No	No	No	Yes	No	Yes	No
	Reenable link	No	No	No	Yes	No	Yes	No
	Disable link	No	No	No	Yes	No	Yes	No
	Customer search bar	No	No	No	Yes	No	Yes	No
Customer Catalog	Create/edit customer	Yes	No	No	Yes	No	No	No
Product Catalog	Create/edit/delete product	Yes	No	No	Yes	No	Yes	No
	Access		Yes	Yes	Yes	Yes	Yes	Yes
	View transaction list		Yes	Yes	Yes	Yes	Yes	Yes
	Transaction details: history, actions, details, customer, documents		Yes	Yes	Yes	Yes	Yes	Yes
	Orders/ Transactions Reports							
	Export CSV		Yes	Yes	Yes	Yes	Yes	Yes
	Refund		No	No	No	Yes	No	No
	Capture		No	No	No	Yes	No	No
	Void		No	No	No	Yes	No	Yes
	Access Receipts		Yes	Yes	No	Yes	No	Yes
	Void Capture		No	No	No	Yes	No	No
	Settlements	Read		No	No	Yes	Yes	No
	Monthly Invoice Summary	Read		Yes	Yes	No	Yes	No
	Access		Yes	Yes	Yes	Yes	Yes	Yes
3D Secure Authentications	View		Yes	Yes	Yes	Yes	Yes*	Yes
<i>*Note: Merchant users can only access the 3-D Secure Authentications of their organization. Sub-organization users can only access the 3-D Secure Authentications of their sub-organizations.</i>								
Report Scheduler	View		Yes	Yes	No	Yes	Yes	No

Location in Verifone Central					Roles			
Section	Components & features (subsection)	Permissions	Merchant Admin	Merchant Order Admin	Merchant Reviewer	Merchant Supervisor	Merchant User	Merchant Cashier
Generated Reports	View	Yes	Yes	No	Yes	Yes	No	No
Payout Report	View	Yes	Yes	No	Yes	No	No	No
Payment Analytics / Dashboard	Access	Yes	No	No	Yes	Yes	No	No
	View	Yes	No	No	Yes	Yes	No	No
Device Management	Devices Report	View	Yes	Yes	No	Yes	Yes	No
	Chain of Custody	View	Yes	Yes	No	Yes	Yes	No
		Create / Edit	Yes	Yes	No	Yes	Yes	No
		Create	No	Yes	No	No	No	No
Boarding	Place orders	View	No	Yes	No	No	No	No
		Update	No	Yes	No	No	No	No
Customize Layout	White Label	Manage	No	No	No	No	No	No

Managing users

Creating new users

You can create new users by following the steps below or by watching this [video tutorial](#).

Follow these steps to create a new user:

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

1. Select **Administration > Users**.

Administration

Easily set up new accounts streamlined Account Setup process, optimize financial operations with our FinOps tools & fine-tune account with our Advanced Settings options.

[Account Setup](#)[Organization Company a](#)[Payment \(Provider\) Cont](#)[Point of Interaction](#)[Users](#)

2. Click **Add New User**.

[< Users](#)

Add new user

General details

First name

Middle name (Optional)

Last name (Optional)

Email

Interface language

English ▾

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

Creating accounts with fake domains (example: Yopmail, Getnada, Guerrillamail) on the production environment is banned. The existing accounts created using fake domains on production have been disabled.

If a user is created using these domains the error message *This email domain is not supported. Please try another address.* will be displayed.

- Organization

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

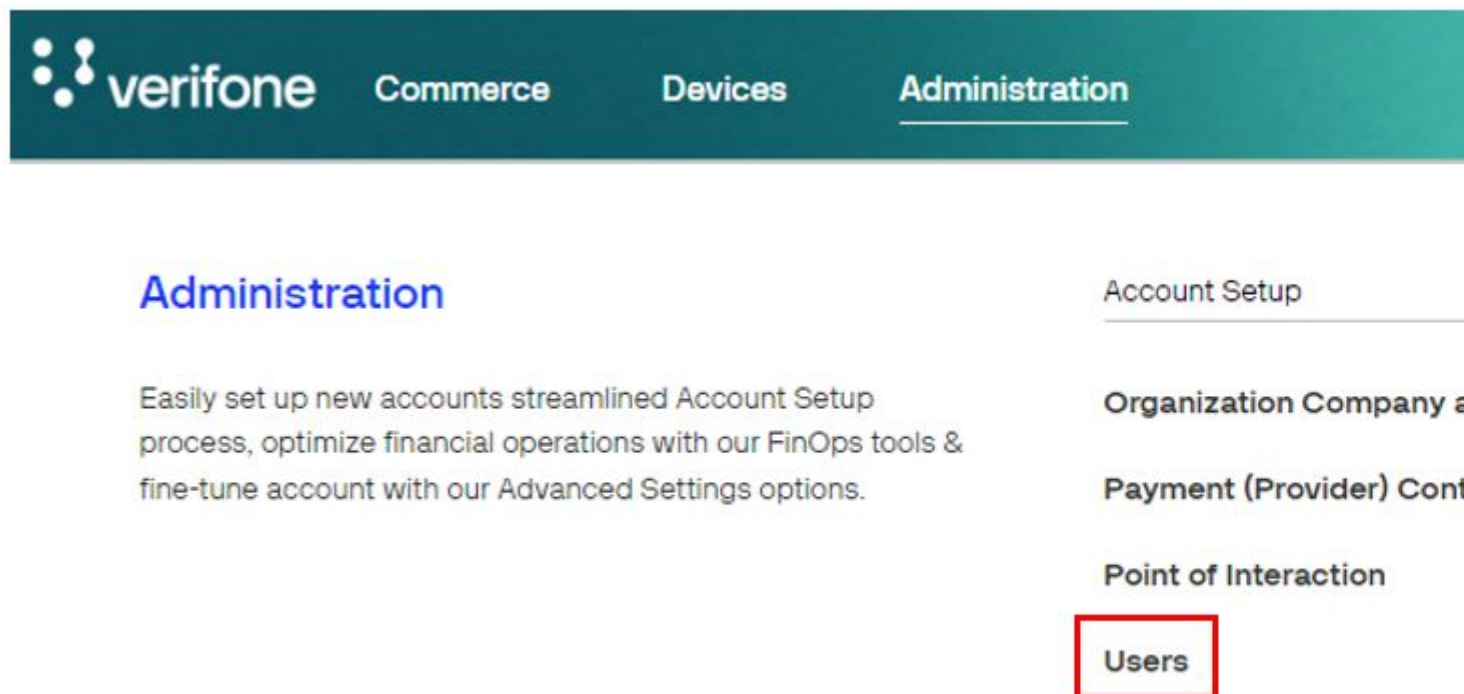
The new user will receive an email inviting them to set up a password to activate their account.

Deleting a user

You can [delete a user](#) by following the steps below or by watching this short video tutorial. Before deleting a user, you need to [disable](#) them first, as only disabled users can be deleted.

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.

Users

Email



Type a Email

Organizations



Status



1 - 1 of 1 users

Name



Email

Roles

John Doe

test@test.com

Merchan

3. Click on **Delete user**.

[< Users](#)

John Doe

General information

First name	John
Middle name	
Last name	Doe
Organization	Verifone
Organization ID	75c0d895-4597-49e3-b591-4a4c555045f9
Email	test@test.com
Roles	Merchant Admin
Status	Disabled

Delete userEnable 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 userDelete user

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

Users

Email ▼

Type a Email

Organizations ▼

Status (+1) ▼

Clear filter

Name ▼	Email	Roles
John Doe	-	-

Managing hierarchy groups

To check more information on hierarchy groups, check the [Organizations](#) documentation.

Adding new organization groups

1. Select **Administration** > **Users**.

Administration

Easily set up new accounts streamlined Account Setup process, optimize financial operations with our FinOps tools & fine-tune account with our Advanced Settings options.

2. Click on **Add new organization group**.

Users

1 - 10 of 1117 organisations

3. Enter the group name and select a parent organization. Select at least two organizations. Click **Save** to create the group.

Add new organization group

General Details

Group name


Test Group

Access Rights

Parent Organization

Parent x

Organizations

 When you select an organization, all its associated child organizations will automatically be included in the group.

<Entity_Name> x

ABC x

Cancel

Save

4. The created group will appear on the *Users* page once you switch to the **Groups** tab.

Users

Type a Group name

Clear filters

1 - 1 of 1 organisations

Group Name 	Parent Organization
Test Group	Parent

Results per page

10 

5. To assign a group to a user switch to the **Users** tab and select the required user from the list.

Users

Email



Type an Email

Organizations



Status



1 - 10 of 17372 users

Name



Email

John Doe

johndoe@test.com

Test User

testuser@test.com

6. On the user's detail page, click on **Edit**, and select the appropriate group organization from the dropdown menu (marked with a **Group** tag), in the *Organization* field. Once the changes are saved, the user is assigned to the selected group.

Access rights

Organization

Group Hierarchy Test (Group) ▼

☒ Name ☐ Organization ID ☐ Business Identifier Value

Group Hierarchy Test 🔍

Group Hierarchy Test (Group)

☒ 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

[Discard changes](#) [Save changes](#)

Editing an organization group

1. On the *Users* page, switch to the **Groups** tab and open the *Group Details* page by selecting a record on the groups list.

Users

Clear filters

1 - 1 of 1 organisations

Group Name 	Parent Organization
Test Group	Parent

Results per page

10 

2. Click on **Edit** to update the group details.

Group Details

General Details

Group name


Test Group

Access Rights

Parent Organization

Parent


Organizations

 When you select an organization, all its associated child organizations will automatically be included in the group.

<Entity_Name>

ABC

Edit

 Assigning a user to a group is not permitted on this page. To change a user's organization to a group, please navigate to the user's detail (edit) page, where you can select the group organization when updating the user's organization. [Users](#)