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 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 Manage**r – 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	Permissi	Roles

Section	Compone & features (subsecti	Merchan Admin	Merchan Order Admin	Merchan Reviewe	Merchan Supervis	Merchan User	Merchan Cashier	Merchan External Partner	Provider White Label Manager	Reseller Manager	Reseller Representative
Administration — Merchant Account Configuration & Onboarding	Organizations	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
		Delete	No	No	No	No	No	No	No	No	No	No
		Secure Card Capture	Yes	Yes	No	No	No	No	No	No	No	No
		Token Scope	Yes	Yes	No	No	No	No	No	No	No	No
	Payment Provider Contracts	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
		See Fees	No	No	No	No	No	No	No	No	No	No
	Points of Interaction	Create	No	Yes	No	No	No	No	No	No	No	No
		Read	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	No	No
		Update	No	Yes	No	No	No	No	No	No	No	No
		Delete	No	Yes	No	No	No	No	No	No	No	No
	3D Secure Contracts	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

Section	Compone & features (subsecti	Merchan Admin	Merchan Order Admin	Merchan Reviewe	Merchan Supervis	Merchan User	Merchan Cashier	Merchan External Partner	Provider White Label Manager	Reseller Manager	Reseller Representative
Read Password	No	No	No	No	No	No	No	No	No	No	
Wallets	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
	Create API key	Yes	No	No	Yes	No	Yes	No	No	No	No
Blocking Rulesets	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
Notification Service	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

Section	Compone & features (subsecti	Merchan Admin	Merchan Order Admin	Merchan Reviewe	Merchan Supervis	Merchan User	Merchan Cashier	Merchan External Partner	Provider White Label Manager	Reseller Manager	Reseller Representative	
Disable	Yes	Yes	No	Yes	No	No	No	No	No	No		
Checkout Themes	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	
Audit Log	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	
Payment Tools	Virtual Terminal	Access	No	No	No	Yes	No	Yes	No	No	No	No
		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
	Pay by Link	Access	No	No	No	Yes	No	Yes	No	No	No	No
		View PBL list	No	No	No	Yes	No	Yes	No	No	No	No

Section	Compone & features (subsecti	Merchan Admin	Merchan Order Admin	Merchan Reviewe	Merchan Supervis	Merchan User	Merchan Cashier	Merchan External Partner	Provider White Label Manager	Reseller Manager	Reseller Representative	
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		
Reporting & Analytics	Orders/ Transactions Reports	Access	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	No
		View transaction list	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	No
		Transaction details: history, actions, details, customer, documents	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	No	No
		Export CSV	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	No	No
		Refund	No	No	No	Yes	No	No	No	No	No	No
		Capture	No	No	No	Yes	No	No	No	No	No	No
		Void	No	No	No	Yes	No	Yes	No	No	No	No
		Access Receipts	Yes	Yes	No	Yes	No	Yes	No	No	No	No
		Void Capture	No	No	No	Yes	No	No	No	No	No	No
	Settlements	Read	No	No	Yes	Yes	Yes	No	No	Yes	No	No
	Monthly Invoice Summary	Read	Yes	Yes	No	Yes	No	No	No	No	No	No

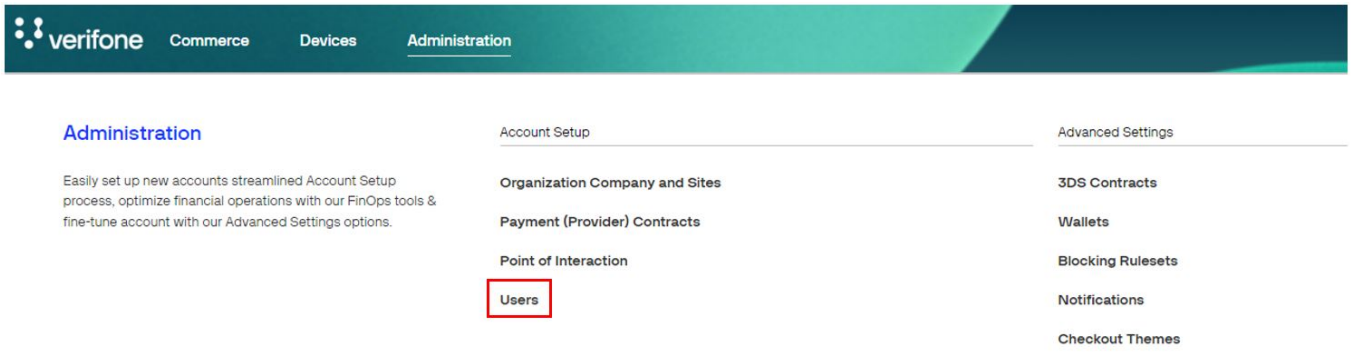
Section	Compone & features (subsecti	Merchan Admin	Merchan Order Admin	Merchan Reviewe	Merchan Supervis	Merchan User	Merchan Cashier	Merchan External Partner	Provider White Label Manager	Reseller Manager	Reseller Representative	
3D Secure Authentications	Access	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	No	No	
	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.*											
Report Scheduler	View	Yes	Yes	No	Yes	Yes	No	No	No	No	No	
Generated Reports	View	Yes	Yes	No	Yes	Yes	No	No	Yes	No	No	
Payout Report	View	Yes	Yes	No	Yes	No	No	No	No	No	No	
Payment Analytics / Dashboard	Access	Yes	No	No	Yes	Yes	No	No	Yes	No	No	
	View	Yes	No	No	Yes	Yes	No	No	Yes	No	No	
Device Management	Devices Report	View	Yes	Yes	No	Yes	Yes	No	No	Yes	Yes	No
	Chain of Custody	View	Yes	Yes	No	Yes	Yes	No	No	Yes	Yes	No
		Create / Edit	Yes	Yes	No	Yes	Yes	No	No	Yes	Yes	No
Boarding	Place orders	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	White Label	Manage	No	No	No	No	No	No	No	Yes	No	No

Creating new users

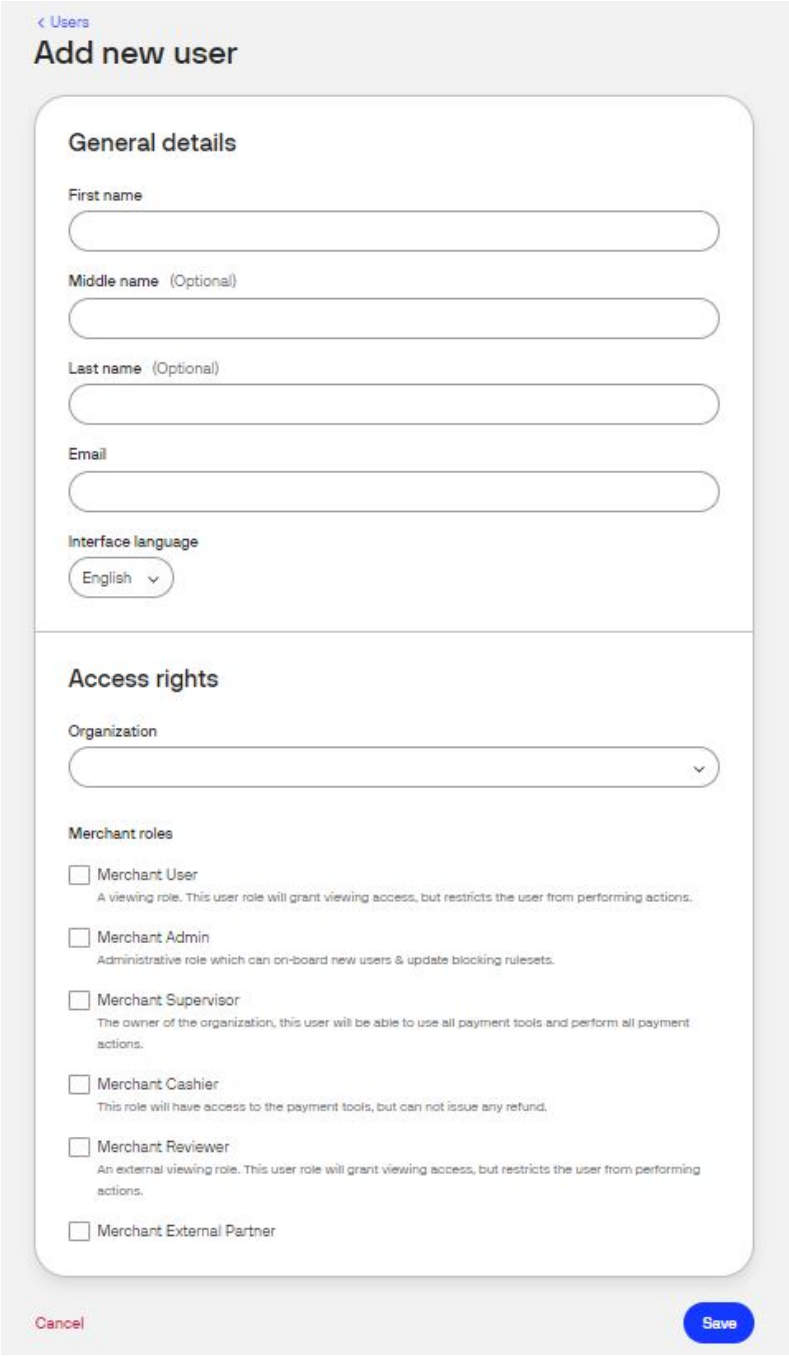
Here is how you can create a new user:

> 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**.



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

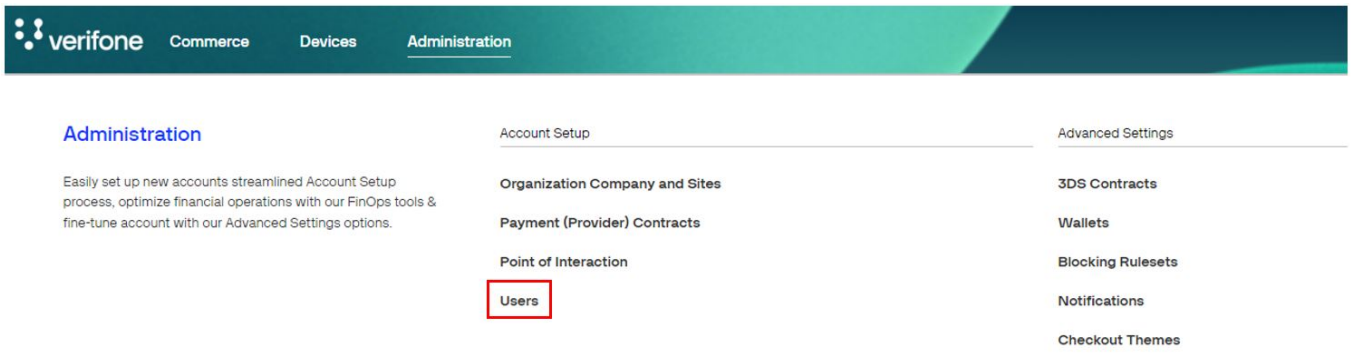
- Organization
- Access rights - determines the level of access needed for transaction tasks. See the Roles and permissions section above for more details

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

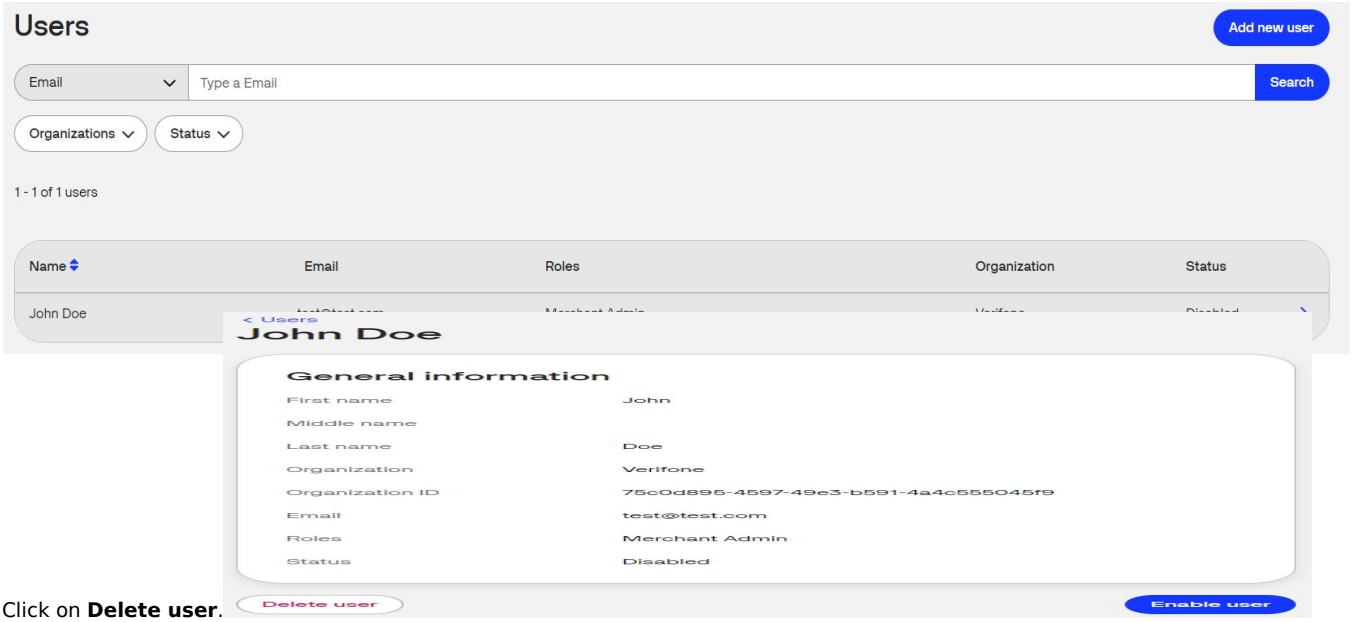
Deleting a user

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

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



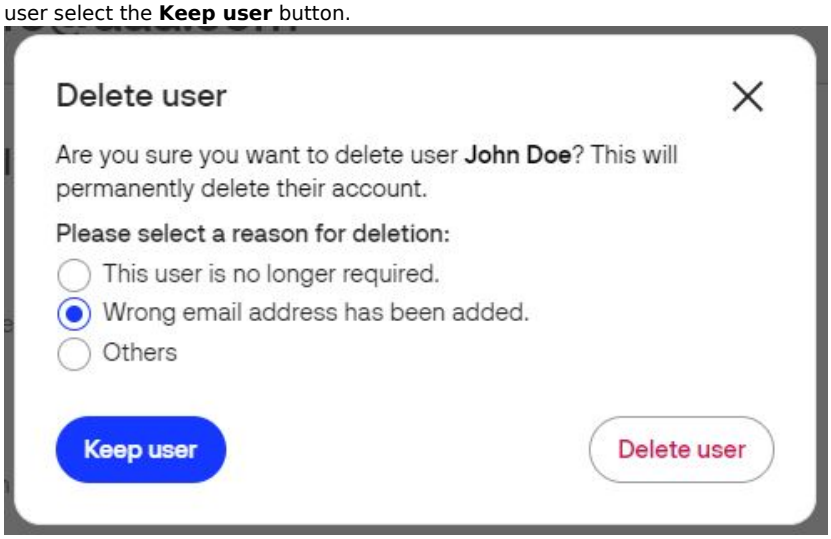
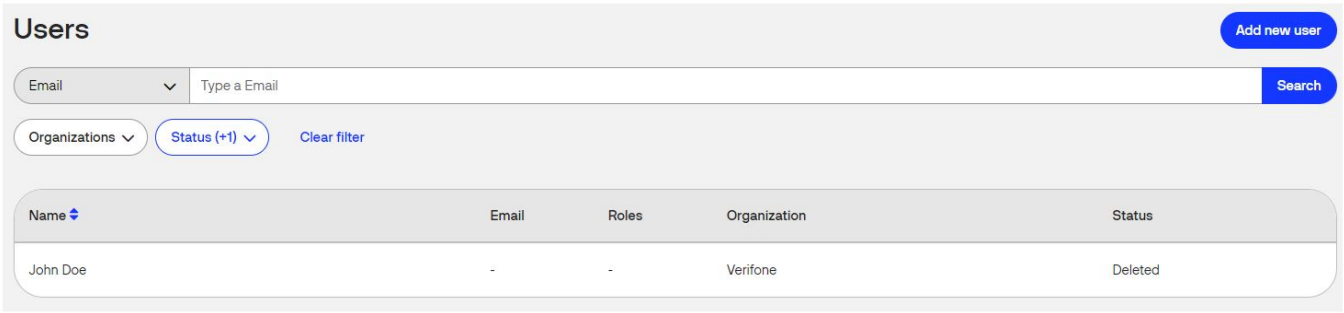
2. Select the needed user from the user list.



3. Click on **Delete user**.

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

4. 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.



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