

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 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, *Organisations* 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*.

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							
Section	Components & features (subsection)		Merchant Admin	Merchant Order Admin	Merchant Reviewer	Merchant Supervisor	Merchant User	Merchant Cashier	Merchant External Partner	Provider White Label Manager
Administration	Organizations	Create	No	No	No	No	No	No	No	No
Merchant Account Configuration										

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

Updated: 11-Apr-2024

Location in Verifone Central			Permissions	Roles								
Section	Components & features (subsection)			Merchant Admin	Merchant Order Admin	Merchant Reviewer	Merchant Supervisor	Merchant User	Merchant Cashier	Merchant External Partner	Provider White Label Manager	
Read	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes				
Update	No	No	No	No	No	No	No	No				
Delete	No	No	No	No	No	No	No	No				
Secure Card Capture	Yes	Yes	No	No	No	No	No	No				
Token Scope	Yes	Yes	No	No	No	No	No	No				
Payment Provider Contracts		Create	No	No	No	No	No	No	No	No		
		Read	Yes	Yes	Yes	Yes	Yes	No	No	Yes		
		Update	No	No	No	No	No	No	No	No	No	
		Delete	No	No	No	No	No	No	No	No	No	
		See Fees	No	No	No	No	No	No	No	No	No	
Points of Interaction		Create	Yes	Yes	No	Yes	No	No	No	No		
		Read	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes		
		Update	Yes	Yes	No	Yes	No	No	No	No		
		Delete	Yes	Yes	No	Yes	No	No	No	No		

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Location in Verifone Central		Permissions	Roles							
Section	Components & features (subsection)		Merchant Admin	Merchant Order Admin	Merchant Reviewer	Merchant Supervisor	Merchant User	Merchant Cashier	Merchant External Partner	Provider White Label Manager
3-D Secure Contracts	Create	No	No	No	No	No	No	No	No	
	Read	Yes	Yes	Yes	Yes	Yes	No	No	Yes	
	Update	No	No	No	No	No	No	No	No	
	Delete	No	No	No	No	No	No	No	No	
	Enable/Disable	No	No	No	No	No	No	No	No	
	Read Password	No	No	No	No	No	No	No	No	
Wallets	Create	Yes	No	No	Yes	No	No	No	No	
	Read	Yes	Yes	Yes	Yes	Yes	No	No	Yes	
	Update	No	No	No	No	No	No	No	No	
	Disable	Yes	No	No	No	No	No	No	No	
Users	Create	Yes	Yes	No	No	No	No	Yes	No	
	Read	Yes	Yes	Yes	No	No	No	No	Yes	
	Update	Yes	No	No	No	No	No	No	No	
	Delete	Yes	No	No	No	No	No	No	No	
	Self Read	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	

Location in Verifone Central			Permissions	Roles							
Section	Components & features (subsection)			Merchant Admin	Merchant Order Admin	Merchant Reviewer	Merchant Supervisor	Merchant User	Merchant Cashier	Merchant External Partner	Provider White Label Manager
Self Update	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes			
Reset Password	Yes	No	No	No	No	No	No	No			
Create API key	Yes	No	No	Yes	No	Yes	No	No			
Blocking Rulesets		Create	Yes	No	No	No	No	No	No	No	
		Read	Yes	No	Yes	Yes	Yes	No	No	Yes	
		Update	Yes	No	No	No	No	No	No	No	
		Delete	Yes	No	No	No	No	No	No	No	
Notification Service		Create	Yes	Yes	No	Yes	No	No	No	No	
		Read	Yes	Yes	No	Yes	No	No	No	No	
		Update	Yes	Yes	No	Yes	No	No	No	No	
		Disable	Yes	Yes	No	Yes	No	No	No	No	
Checkout Themes		Create Theme	No	No	No	Yes	No	Yes	No	No	
		View	No	No	No	Yes	No	Yes	No	No	
		Read	No	No	No	Yes	No	Yes	No	No	
		Update	No	No	No	Yes	No	Yes	No	No	
		Delete	No	No	No	Yes	No	Yes	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	Merchant External Partner	Provider White Label Manager
Audit Log	Create		No	No	No	No	No	No	No	No	
	Read		Yes	No	No	No	No	No	No	No	
	Update		No	No	No	No	No	No	No	No	
	Delete		No	No	No	No	No	No	No	No	
Payment Tools	Virtual Terminal		Access	No	No	No	Yes	No	Yes	No	No
			View	No	No	No	Yes	No	Yes	No	No
			Create & Initiate payment / void payment	No	No	No	Yes	No	Yes	No	No
			Capture payment/ refund/ cancel	No	No	No	Yes	No	No	No	No
	Pay by Link		Access	No	No	No	Yes	No	Yes	No	No
			View PBL list	No	No	No	Yes	No	Yes	No	No
			Create link	No	No	No	Yes	No	Yes	No	No
			Reenable link	No	No	No	Yes	No	Yes	No	No
			Disable link	No	No	No	Yes	No	Yes	No	No

Location in Verifone Central		Permissions	Roles							
Section	Components & features (subsection)		Merchant Admin	Merchant Order Admin	Merchant Reviewer	Merchant Supervisor	Merchant User	Merchant Cashier	Merchant External Partner	Provider White Label Manager
Reporting & Analytics	Transaction Reporting	Access	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
		View transaction list	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
		Transaction details: history, actions, details, customer, documents	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes
		Export CSV	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes
		Refund	No	No	No	Yes	No	No	No	No
		Capture	No	No	No	Yes	No	No	No	No
		Void	No	No	No	Yes	No	Yes	No	No
		Access Receipts	Yes	Yes	No	Yes	No	Yes	No	No
		Void Capture	No	No	No	Yes	No	No	No	No
	Settlements	Read	No	No	Yes	Yes	Yes	No	No	Yes
	Monthly Invoice Summary	Read	Yes	Yes	No	Yes	No	No	No	No
	3-D Secure Authentications	Access	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes

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Updated: 11-Apr-2024

Location in Verifone Central			Permissions	Roles							
Section	Components & features (subsection)			Merchant Admin	Merchant Order Admin	Merchant Reviewer	Merchant Supervisor	Merchant User	Merchant Cashier	Merchant External Partner	Provider White Label Manager
View	Yes	Yes	Yes	Yes	Yes*	Yes	No	Yes			
<i>*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.</i>											
Report Scheduler		View	Yes	Yes	No	Yes	Yes	No	No	No	
Generated Reports		View	Yes	Yes	No	Yes	Yes	No	No	Yes	
Payout Report		View	Yes	Yes	No	Yes	No	No	No	No	
Payment Analytics / Dashboard		Access	No	No	No	Yes	Yes	No	No	Yes	
		View	No	No	No	Yes	Yes	No	No	Yes	
Device Management	Devices Report		View	Yes	Yes	No	Yes	Yes	No	No	Yes
	Chain of Custody		View	Yes	Yes	No	Yes	Yes	No	No	Yes
			Create / Edit	Yes	Yes	No	Yes	Yes	No	No	Yes
Customize Layout	White Label		Manage	No	No	No	No	No	No	No	Yes

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**.

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

Updated: 11-Apr-2024

 **Commerce** **Devices** Administration

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 and Sites

Payment (Provider) Contracts

Point of Interaction

Users

Advanced Settings

3DS Contracts

Wallets

Blocking Rulesets

Notifications

Checkout Themes

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

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Updated: 11-Apr-2024

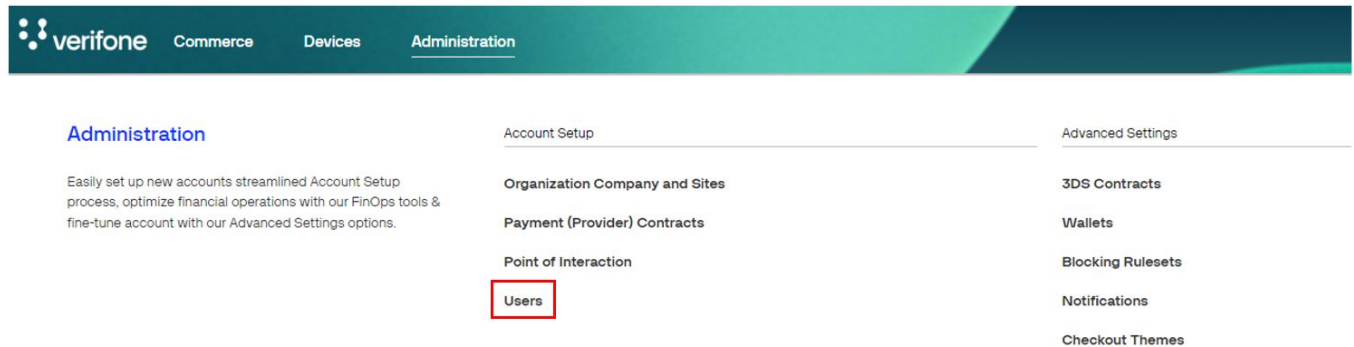
- Organization
- Access rights - determines the level of access needed for transaction tasks. See the [Roles and permissions](#) section above for more details

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

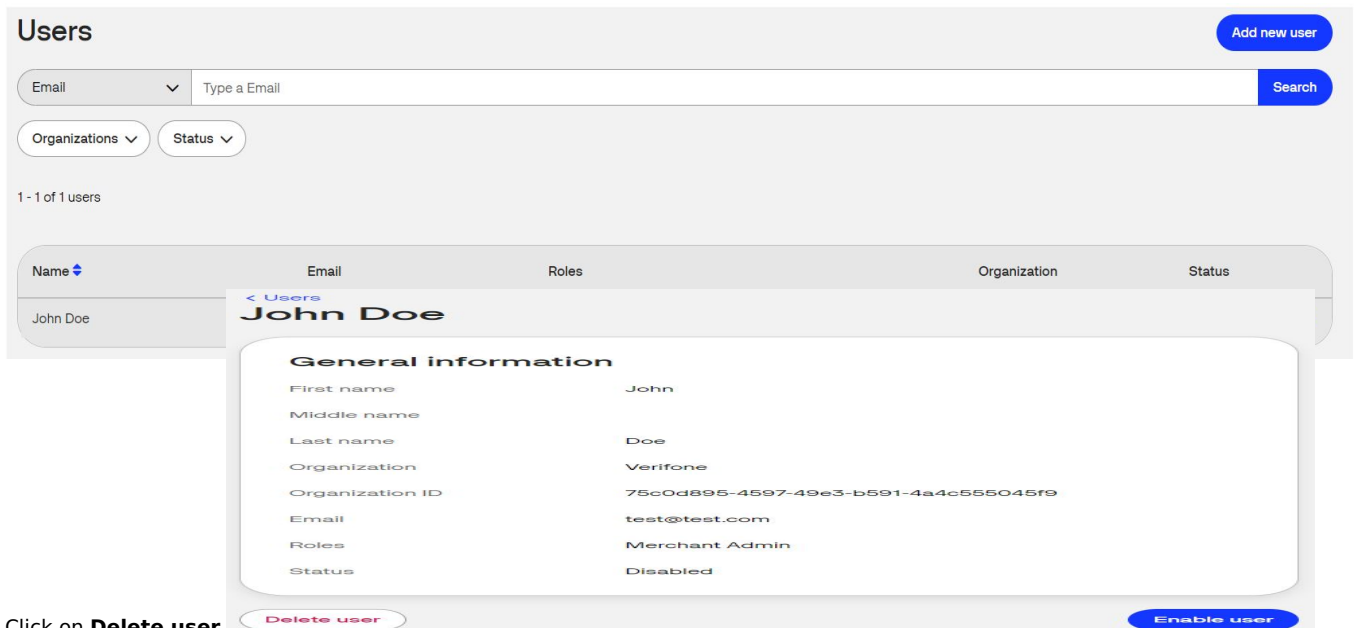
Deleting a user

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**.

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

Updated: 11-Apr-2024

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.

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

5. 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	Email	Roles	Organization	Status
John Doe	-	-	Verifone	Deleted