



User management

Back Office user manual

Document version 1.9

Contents

1. HISTORY OF THE DOCUMENT.....	3
2. SIGNING IN TO MERCHANT BACK OFFICE.....	4
3. ACCESSING THE USER MANAGEMENT PAGE.....	5
4. CREATING A USER.....	6
5. DESCRIPTION OF USER PERMISSIONS.....	9
6. SEARCHING FOR A USER.....	11
7. MANAGING USER PERMISSIONS.....	12
7.1. Resetting the user password.....	12
7.2. Editing the user account.....	14
7.3. Deactivating the user account.....	16
7.4. Configuring the user access mode.....	17
8. CUSTOMIZING THE USER DETAIL DISPLAY.....	18
9. OBTAINING HELP.....	19

1. HISTORY OF THE DOCUMENT

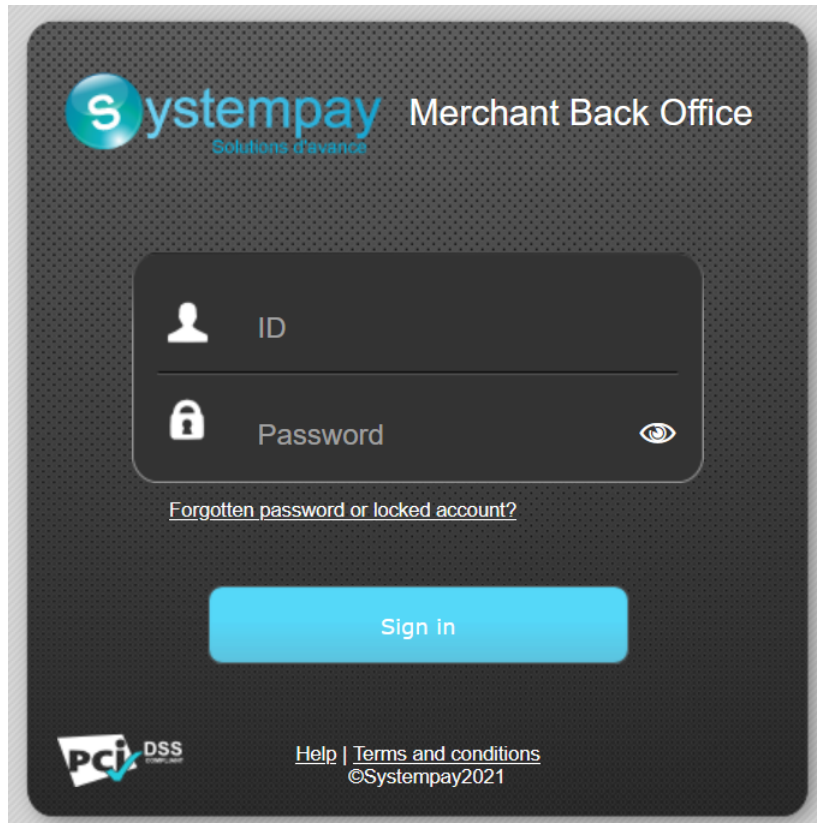
Version	Author	Date	Comment
1.9	Natixis Payment Solutions	11/17/2021	Clarification in the <i>Creating a user</i> chapter.
1.8	Natixis Payment Solutions	3/17/2021	Update of the <i>Creating a user</i> chapter: <ul style="list-style-type: none"> The list of available shops is displayed by default. Additional details on multi-company access.
1.7	Natixis Payment Solutions	2/16/2021	<ul style="list-style-type: none"> Update of the <i>Creating a user</i> chapter.
1.6	Natixis Payment Solutions	10/21/2020	Additional details in chapters: <ul style="list-style-type: none"> Accessing the user management page Creating a user Managing user permissions
1.5	Natixis Payment Solutions	8/3/2020	Additional details in chapters: <ul style="list-style-type: none"> Accessing the user management page Managing user permissions Description of user permissions
1.4	Natixis Payment Solutions	3/25/2019	Creating a user: additional details on the login choice.
1.3	Natixis Payment Solutions	1/30/2019	Additional details in Associating permissions with a user.
1.2	Natixis Payment Solutions	10/20/2018	Additional details in chapters: <ul style="list-style-type: none"> Managing users via the Merchant Back Office User access management Associate permissions with a user
1.1	Natixis Payment Solutions	7/9/2018	Additional details in chapters <ul style="list-style-type: none"> Creating a user Customize user detail display
1.0	Natixis Payment Solutions	3/22/2017	Initial version

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2. SIGNING IN TO MERCHANT BACK OFFICE

Sign in to the Back Office:

<https://paiement.systempay.fr/vads-merchant/>



1. Enter your login.

The login is sent to the merchant's e-mail address (the subject of the e-mail is **Connection identifiers- [your shop name]**).

2. Enter your password.

The password is sent to the merchant's e-mail address (the subject of the e-mail is **Connection identifiers- [your shop name]**).

3. Click Sign in.

After 3 password entry errors, the user's account is locked. Click on the link **Forgotten password or locked account** to reset it.

3. ACCESSING THE USER MANAGEMENT PAGE

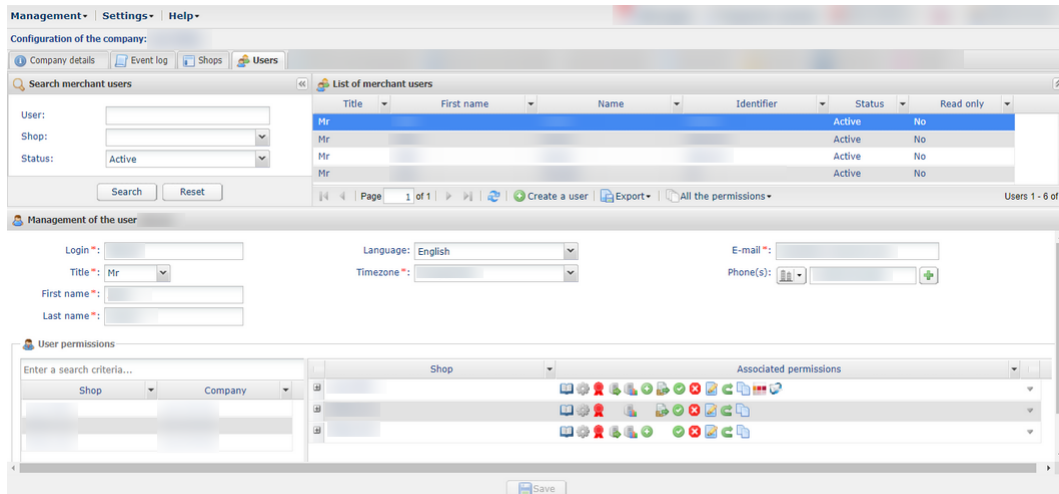
Users are managed by E-commerce customer service.

However, it can be delegated to any user with user management rights.

If your user does not have these rights, please contact your company administrator or contact E-commerce customer service.

The user management page is accessible via the Merchant Back Office (**Settings > Company > Users** tab).

This tab is visible only if your user has the user management rights.



In this tab, depending on your rights, you can:

- Manage user access permissions by right-clicking a username
- Create a new user
- Associate permissions with a user
- Disable user access
- Search for a user
- Customize user detail display

All the changes applied to users are recorded. Update history is accessible via **Settings > Company > Event log** tab.

Specific update details can be viewed by double-clicking the update in question.

IMPORTANT

A Merchant Back Office user is automatically purged:

- When his or her account has been disabled for 500 days.
- If he or she has not logged in for 500 days.
- If his or her password expired over 500 days ago.
- If his or her password was blocked over 500 days ago.

4. CREATING A USER

This action is performed by a user authorized to manage user accounts. For more information on granting this permission to manage user accounts, please contact E-commerce customer service.

IMPORTANT

A user account is personal and should not be shared.


Sharing a user account can lead to instability in custom configurations and also make it less relevant to use the event logs when needed.

To create a user:

1. Click the **Creating a user button** in the **Users** tab (menu **Settings > Company**).

The **Creating a user** button can also be accessed by right-clicking an existing user.

The creation page appears.



2. Populate the mandatory fields marked with an asterisk.

- **Title**
- **First name**
- **Last name**
- **Timezone** selected from the list

The information that will be shared via your account will use the chosen time zone.

- **E-mail**

Please enter a valid e-mail address. The temporary login and password will be sent to this address.

3. Populate the other fields.

- **Login**

Corresponds to the login. It is associated with a password.

By default, the login is automatically generated at the end of the user creation.

You have the possibility to choose the login. If the **Creating a user** button remains grayed out, this login might already exist. In this case, edit your entry or let the system automatically generate the login.

- **Language**

The selected language is used for sending messages (e-mail or SMS) by the payment gateway.

- **Phone number(s)**

A mobile phone number is highly recommended as your company's security code will be sent to this number and the user will need it to log in for the first time.

4. Check the **Read only** box if you wish.

Using **Read only** allows to remove the right to modify from a user.

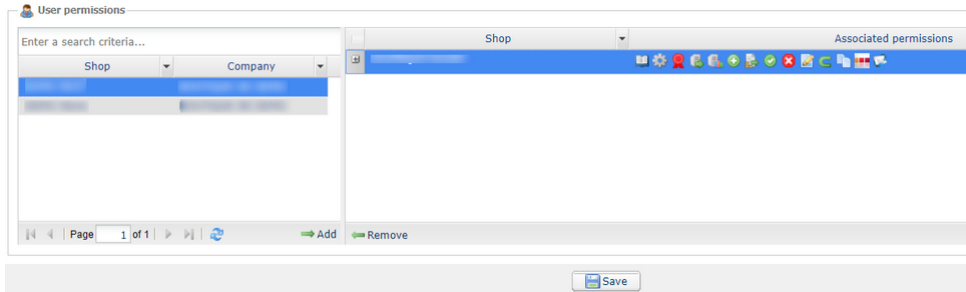
If the box is selected, the user will only be able to view the details of the companies or shops which he/she has access to.

Note

Even in read-only mode, a user must have at least one permission within a shop (for example, the right to view transactions).

If you wish to not grant any permissions to a user, it is recommended to change their account status to **Disabled** after creating it (see chapter [Deactivating the user account](#) on page 16).

5. Associate at least one access right to a shop to complete its creation.



The list of the company shops for which you have permissions gets displayed.

a. Select the shop of your choice from the list.

IMPORTANT

If the desired shop does not appear on the list, there are two possible causes:

- Either you do not have the right to access this shop. In this case, you must obtain the access with your account before being allowed to grant it to another user.
- Or this shop belongs to another of your companies. To give the multi-company access right to a user, i.e. associate permissions on one or several shop(s) of different companies, you must contact E-commerce customer service.

b. Click the **Add** icon or drag-and-drop a shop to associate it with a specific user.

c. Select the added shop, then right-click on it.

The permission management context menu appears.

The permissions defined as standard for a new user are assigned by default.

It is possible to disable or enable additional permissions.

Note

In order to view permission details and see the labels associated with the icons:

- Place the mouse pointer over an icon to display a tool tip with details.
- You can also click the + icon to the left of the shop name to display the details.

You can also view the chapter [Description of user permissions](#) on page 9.

d. Check or uncheck the boxes according to the permissions you wish to associate with the user.

Notes

You can check the box **Associate all permissions** or the box **Remove all permissions**.

You can also click **Apply to all shops** to associate the selected permissions with all the selected shops.

e. If you wish to revoke the access to one or several shops from your user:

- Select the shop(s)
- Click **Remove**

6. Click **Create**.

The user receives the connection identifiers (login + temporary password) by e-mail.

Upon their first connection to the Merchant Back Office, the security code of the company will be requested after the entry of the login and the temporary password.

You must transmit the security code to the user by your own means (e-mail, phone, etc.).

IMPORTANT












For security reasons, if a user enters an incorrect security code three times, their account will be locked and any new entry attempts will be systematically refused. The user will then have to contact the technical support supportvad@lyra-network.com.

5. DESCRIPTION OF USER PERMISSIONS

The user can access one or several shops. Customizable permissions are associated with each shop. It is possible to edit the permissions of a user and/or limit the number of shops that can be accessed.

Warning: you cannot grant more permissions than your account has.

The table below describes the different permissions.

Icon	permission label	Description
	View transactions	Allows to view the transactions made within a shop. Depending on their permissions, the user can access Test and/or Production transactions.
	Change parameters	Allows to make changes in the existing configuration. For example, the user can associate new Merchant IDs with their shop, configure the shop, etc.
	Manage keys and signature algorithms	Allows to view the Keys tab, regenerate a Test and/or Production key depending on their access permissions. Allows to choose a signature algorithm when necessary. In order to better handle this permission, it is recommended to also have access to Change parameters .
	Send the Instant Payment Notification	Allows to execute the notification URLs. In order to better handle this permission, it is recommended to also have access to Change parameters .
	Configure risk assessment	Allows to configure the risk assessment parameters (control payment methods, define the card greylist, etc.)
	Make a manual payment	Allows to make a manual payment via the Merchant Back Office. In order to benefit from this permission, the user must also have the permission to View transactions .
	Manage payment orders	Allows to manage payment orders via the Merchant Back Office. Depending on the offer of the shop, the user can create a payment order: <ul style="list-style-type: none"> • by e-mail • by SMS • by URL
	Validating a transaction	Allows to manually validate payment transactions in deferred mode. In order to benefit from this permission, the user must also have the permission to View transactions .
	Canceling a transaction	Allows to cancel one or several transactions that have not reached the capture date. In order to benefit from this permission, the user must also have the permission to View transactions .
	Modifying a transaction	Allows to edit one or several transactions with the status: <ul style="list-style-type: none"> • To be validated • To be validated and authorized • Waiting for authorization • Waiting for capture In order to benefit from this permission, the user must also have the permission to View transactions .
	Make a refund	Allows to re-credit a buyer's account after a transaction. This action can be applied to a captured transaction. In order to benefit from this permission, the user must also have the permission to View transactions .





Icon	permission label	Description
	Duplicate a transaction	Allows to create a new payment based on an existing transaction. This action can be applied to a captured transaction. In order to benefit from this permission, the user must also have the permission to View transactions .
	Manage online payment forms	Allows to access and configure the data collection form.
	Configure the SMS service	Allows to access and manage the merchant's SMS account. The SMS account serves as a payment order while sending a payment and/or as an SMS notification after a payment.

Table 1: Description of permissions

6. SEARCHING FOR A USER

1. Go to **Settings > Company > Users**

By default, the search page appears to the left of the user list.

It is possible to mask this search page using the  icon.

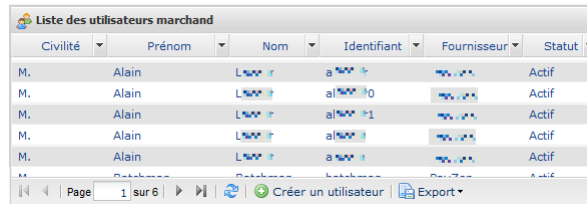
2. Search for the user using the search fields:

- **User:** enter the full or partial first name, last name, identifier or e-mail.
- **Shop:** select the shop from the drop-down list.
The result displays the users associated with the selected shop.
- **Status:** active or disabled.

3. Click **Search**.

The **Reset** button allows to delete everything and start a new search.

The search result appears in the field **List of merchant users**.



Civilité	Prénom	Nom	Identifiant	Fournisseur	Statut
M.	Alain	L...	a...		Actif
M.	Alain	L...	a...0		Actif
M.	Alain	L...	a...1		Actif
M.	Alain	L...	a...		Actif
M.	Alain	L...	a...1		Actif

7. MANAGING USER PERMISSIONS

Once a user has been created, you can manage their permissions on their account.

If you wish to give the right to manage users to another user, contact E-commerce customer service.

7.1. Resetting the user password

This action is performed by a user authorized to manage user accounts. For more information on granting this permission to manage user accounts, please contact E-commerce customer service.

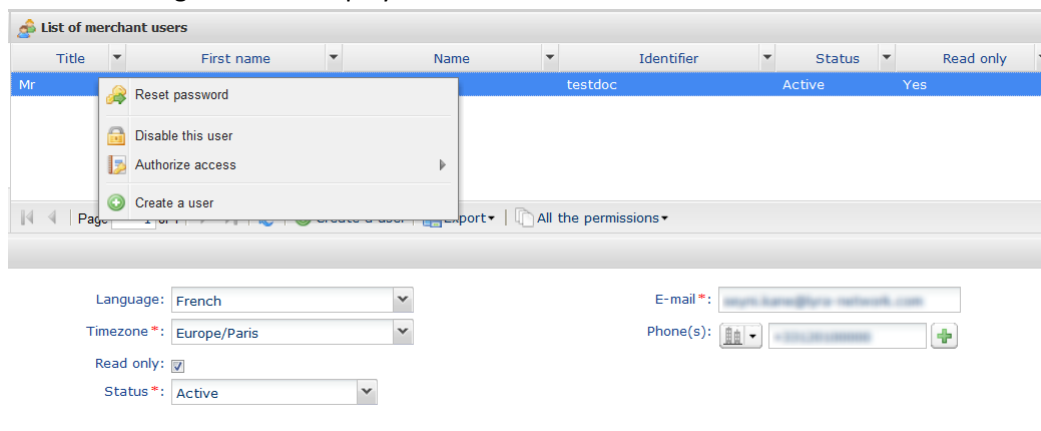
Password reset is often performed upon request and/or in case another user is blocked.

Note:

*If a user requests a reset for the sole purpose of changing their password, you can redirect them to their own account in the Merchant Back Office. They will then be able to choose a new password by clicking on their **Name** > **Change password**.*

*If a user wants to reset their password on their own, for example after forgetting it, they can do so by clicking on the **Forgotten password or locked account** link on the login page in the Merchant Back Office. The detailed process is described in the [FAQ](#).*

1. Search for a merchant user (see chapter [Searching for a user](#) on page 11).
2. Select the user and right-click to display the context menu.



3. Click on **Reset password**.

The confirmation request page appears.

4. Click **Yes** to confirm.

An e-mail is immediately transmitted to the user to inform them of the new connection identifiers. The security code will be requested upon the first connection.

To facilitate the (re)transmission of the security code to the user, the following message is displayed:

The password of the user xxxxxxxx has been successfully reset. If necessary, send them the security code of your company: xxxxxx.

- **Copy the security code to the clipboard**

One click on the button allows to copy the security code to the clipboard.

You simply need to paste it into an e-mail or into another medium of your choice to send it to the user.

IMPORTANT

For security reasons, if a user enters an incorrect security code three times, their account will be locked and any new entry attempts will be systematically refused. The user will then have to contact the technical support supportvad@lyra-network.com.

7.2. Editing the user account

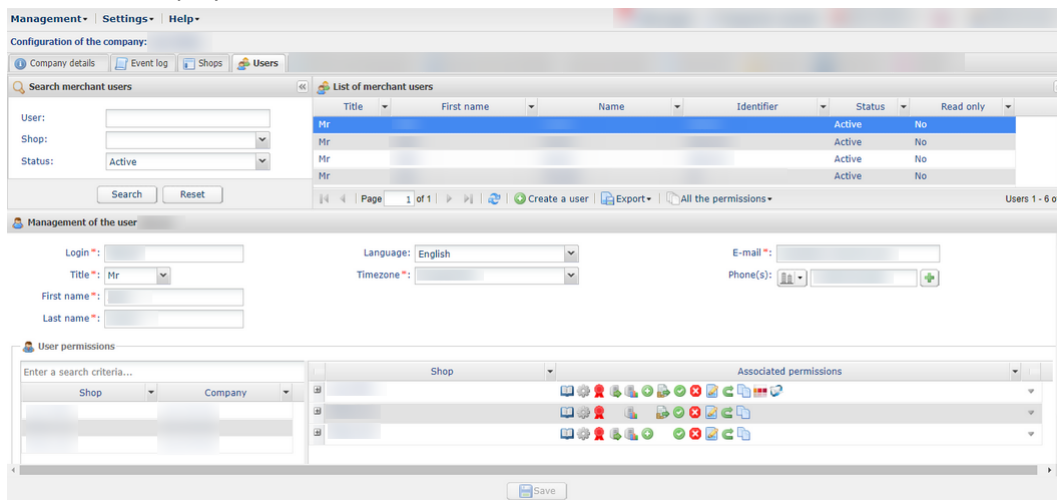
This action is performed by a user authorized to manage user accounts. For more information on granting this permission to manage user accounts, please contact E-commerce customer service.

Note:

A user can edit some details of their account in the Merchant Back Office. For example, they can edit the display options of their personal details by clicking on their **Name > My account**.

The modification of an account by an authorized user is carried out when there is a change in the identifier, the status and the user rights (access to the store(s) for example).

1. Search for the user account to modify (see chapter [Searching for a user](#) on page 11).
2. Select the user to display their account details.



3. Edit the desired field(s).

- **Login**

This login is associated with the connection password.

If it is modified, the user will receive an e-mail inviting him/her to log in, as upon the first connection. They will need to log in once again but will be able to keep their old password.

- **Title**

- **First name**

- **Name**

- **Timezone** selected from the list

- **E-mail**

In case of modification of the e-mail address, the new address will be taken into account immediately. However, an e-mail notification will be sent to the user's old address. This notification displays the old and new address to verify that the change is intentional.

- **Language**

The selected language will be the default language used for communication (e.g. by e-mail) on your account.

- **Phone number(s)**

A mobile phone number is highly recommended as your company's security code will be sent to this number and the user will need it to log in for the first time.

- **Read only**

If enabled, the user cannot make any changes. The user will be able to only view the details related to the company(ies) and/or shop(s) which he or she has access to.

- **User permissions**

You can add or delete user permissions just like upon user creation (see chapter [Creating a user](#) on page 6):

- Add or remove a shop
- Check or uncheck the boxes with the permissions that you wish to associate with the user

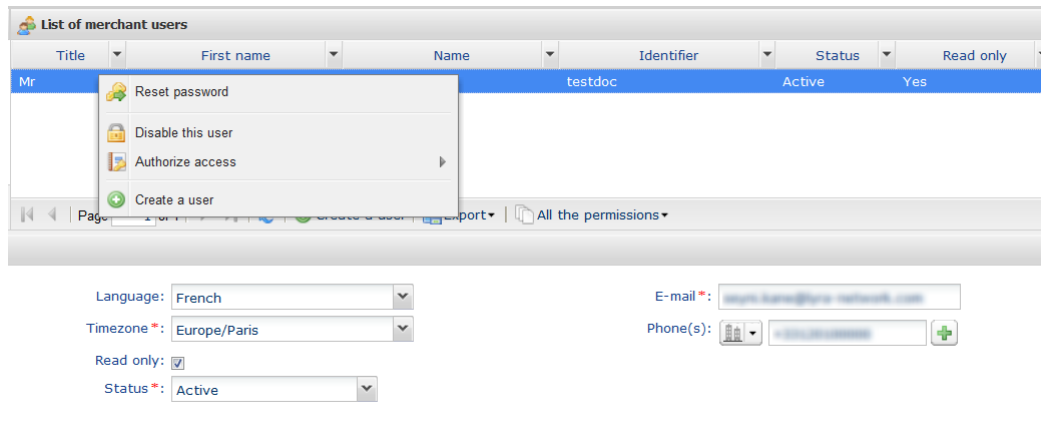
4. Click Save.

7.3. Deactivating the user account

This action is performed by a user authorized to manage user accounts. For more information on granting this permission to manage user accounts, please contact E-commerce customer service.

Deactivation of a user account is performed when you no longer wish to grant access rights to that user. Naturally, it is possible to reverse the action whenever you want.

1. Search for a merchant user (see chapter [Searching for a user](#) on page 11).
2. Select the user and right-click to display the context menu.



3. Click on **Disable this user**.

The deactivation applies as soon as you confirm the action.

Another way of doing it is to select the user and choose **Disabled** in the **Status** field.

4. Click **Save**.

In case of a connection attempt, the user with the disabled account will receive the message **“Your account has been disabled. Please contact your sales contact”**.

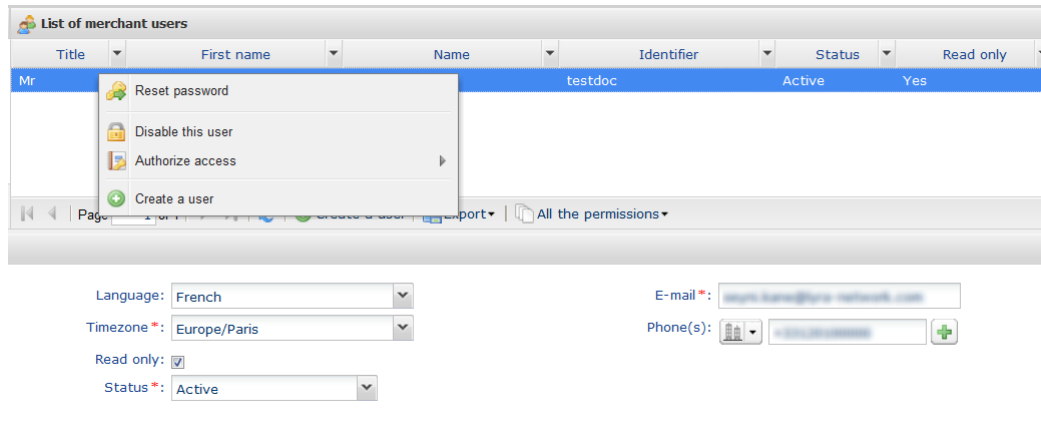
To reactivate the user, simply return to the context menu or do it via the user status.

To find a disabled user, all you need to do is filter the users by **Status = Disabled** in the Search area.

7.4. Configuring the user access mode

This action is performed by a user authorized to manage user accounts. For more information on granting this permission to manage user accounts, please contact E-commerce customer service.

1. Search for a merchant user (see chapter [Searching for a user](#) on page 11).
2. Select the user and right-click to display the context menu.



3. Click on **Authorize access** and select the desired access mode.

- **Test:** the user will only have access to test environment.
- **Production:** the user will only have access to production environment.
- **Test and Production:** the user has access to both environments.

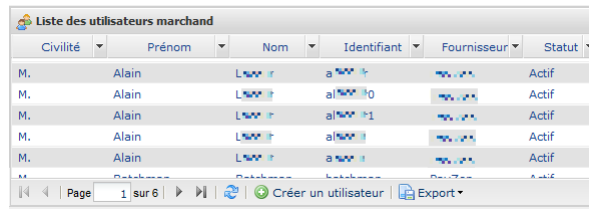
The user can view test and production transactions. Depending on the user permissions, he or she can make payments in test mode via payment orders, for example.

The test environment is partitioned. The displayed data and the completed actions do not interfere with the production environment.

4. Click **Save**.

8. CUSTOMIZING THE USER DETAIL DISPLAY

The user search results appear in the field **List of merchant users**.



Civilité	Prénom	Nom	Identifiant	Fournisseur	Statut
M.	Alain	L...	a...		Actif
M.	Alain	L...	a...0		Actif
M.	Alain	L...	a...1		Actif
M.	Alain	L...	a...		Actif
M.	Alain	L...	a...		Actif

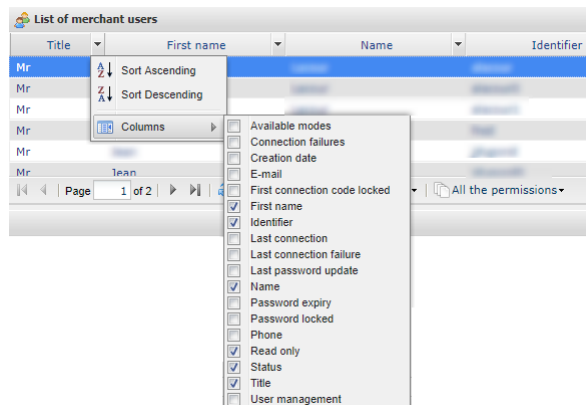
Usually, the columns **Title**, **First name**, **Last name**, **Identifier** and **Status** are displayed by default. They are considered as the most relevant ones but you can disable or enable some others.

Display customization allows to have more information on user privileges. For example, if you display the column **User management**, it will be easier for you to know if a user has the necessary privileges for managing other users.

In order to customize the column display:

1. Click the arrow next to one of the displayed columns, then click **Columns**.

The list of columns appears.



Title	First name	Name	Identifier
Mr			
Mr			
Mr			
Mr			
Mr			
Mr	lean		

- Available modes
- Connection failures
- Creation date
- E-mail
- First connection code locked
- First name
- Identifier
- Last connection
- Last connection failure
- Last password update
- Name
- Password expiry
- Password locked
- Phone
- Read only
- Status
- Title
- User management

2. Check or un-check the desired columns.

9. OBTAINING HELP

Looking for help? Check our FAQ on our website

<https://paiement.systempay.fr/doc/en-EN/faq/sitemap.html>

For any technical inquiries or if you need any help, contact *technical support*.

To help us process your demands, you will be asked to communicate your shop ID (an 8-digit number).

This information is available in the “registration of your shop” e-mail or in the Merchant Back Office (**Settings > Shop > Configuration**).