

App Secure Administrator Manual

Gateway Specification

Version 3.5.1 | Update 1/16/19

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1. Introduction

App Secure is a secure and centralized management tool that allows merchants to create and manage user accounts and user permissions for anyone within their organization who has a need to access any of Planet Payment's iPAY Web-based applications.

Planet Payment will set up one administrator's account for each merchant. The designated administrator can then set up all other users. Every user of a iPAY Web-based application must have his or her own account to access the application(s).

It is **strongly recommended** that each merchant have **two or more** users set up as administrators in the event that one administrator is not available.

The structure of App Secure is based on **users, groups, and roles**. The **users** are the people in your organization who will be using one or more Planet Payment products. Each user belongs to a **group**. Groups are simply a collection of users who have the same **administrator**. Each user also has one or more **roles** assigned to him/her. The roles are what give the user permission to access the different functions of each product. The administrator's job is to set up and maintain user profiles and assign roles to users.

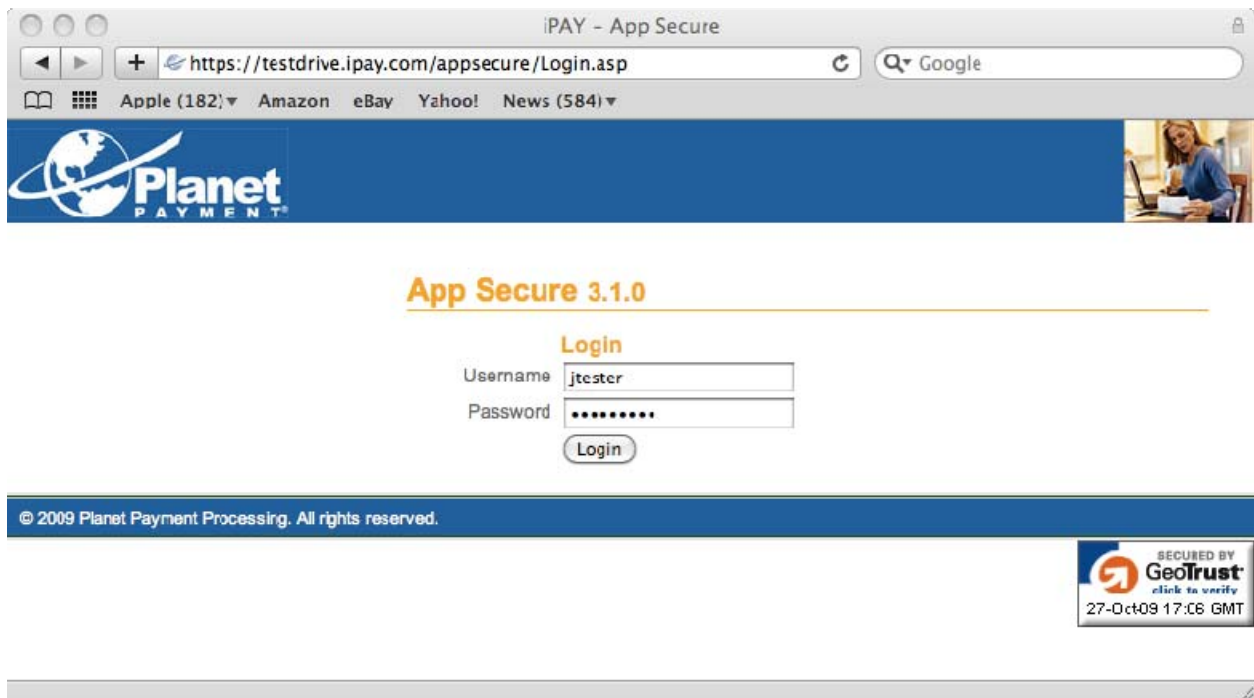
Users, groups, and roles are all explained in detail in this manual.

1.1 Log In

To log into App Secure, go to <https://secure.ipay.com/AppSecure>

On the login page, enter your user ID and password. These will have been provided to you by Planet Payment. If you do not have this information, please contact Merchant Services at 1-866-704-4729.

Figure 1 - App Secure Login Page

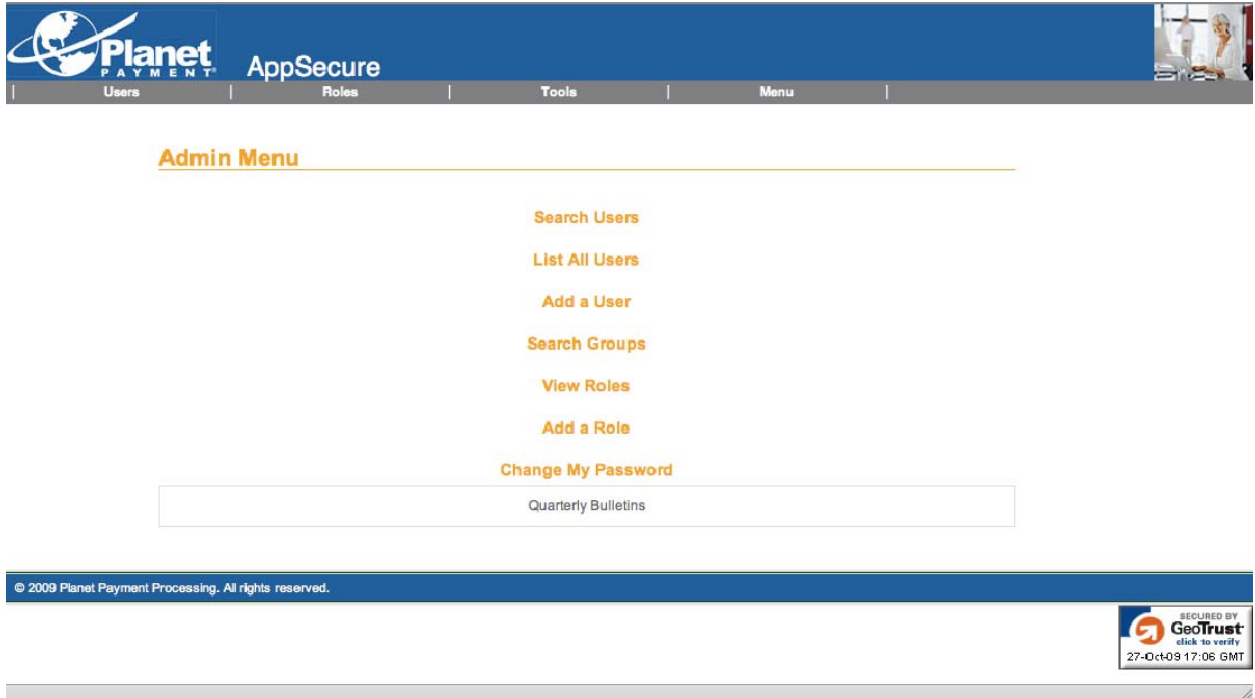


The screenshot shows a web browser window titled "iPAY - App Secure". The address bar contains the URL "https://testdrive.ipay.com/appsecure/Login.asp". The browser's search bar shows "Google". Below the browser window, the Planet Payment logo is visible on the left, and a small image of a woman working at a computer is on the right. The main content area features the heading "App Secure 3.1.0" in orange. Below this, the "Login" section includes a "Username" field with the text "jtester", a "Password" field with masked characters "*****", and a "Login" button. At the bottom of the page, there is a copyright notice: "© 2009 Planet Payment Processing. All rights reserved." and a GeoTrust security seal with the text "SECURED BY GeoTrust click to verify 27-Oct-09 17:08 GMT".

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The *Admin Menu* page appears

Figure 2 - Admin Menu Page



From this page, you can search for users, list all your users, add a user, search user groups, view user roles, add a role, or change your password. All functions are discussed in this document, starting with adding a new user.

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2. Manage Users

2.1 Add a User

To add a user, click the **Add a User** link. The *Add User (Step 1)* page appears.

Figure 3 - Add User (Step 1) Page

Add User (Step 1)

User Attributes

*User Name: *Temporary Password:
Job Title: *Confirm Password:
*First Name: Zone: Internal External
*Last Name:
*E-mail Address:

*Group: [Search](#)

Merchant Attributes

Merchant Level:
*Company #: [View Associated Companies](#)
Merchant Level Value: 0

< Back Next > Cancel

* Indicates required field.

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2.1.1 User Attributes

In the **User Attributes** section, enter all the information about the user. See the notes on page 11 for information about user names and passwords.

The **Group** function is used to group users within your organization. A root group for your organization will already be created by Planet Payment when your account is set up. All users must be assigned to a group.

If you want to have all your users administered within this one group, then all you have to do is select the one group that has been set up for your company. If you want the user to belong to a group other than the default, then click the **Search** link to search for a group to put the user in.

If you want to create subgroups to be administered by other administrators, see the section on Add/Manage Groups beginning on page 12 for information on how to add a new group.

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2.1.2 Merchant Attributes

In the **Merchant Attributes** section, you need to assign the Merchant Level and Company Number for your new user.

The *Merchant Level* is the level of the user in the hierarchy. You can only create users at or below the level you have been assigned. For example, if you are an administrator at the Chain (4) level, you can only create users at the Chain (4) level and the DBA (6) level (currently, the iPAY Gateway does not use a Merchant Level 5). See the following page for more information about levels.

After you have selected the Merchant Level, enter your company number and then click the **View Associated Companies** link. All associated company numbers at the selected Merchant Level are displayed in a separate window. If the entire list matches the company numbers you want this user to be able to access in his or her assigned applications, click the **Done** button and that level of access will be set.

If the list includes too many company numbers, select a **lower** Merchant Level and click the **View Associated Companies** link again to view the list (you cannot select individual company numbers from the list in the pop-up window). Always click the **Done** button to set the level for the user.

The *Merchant Value* is automatically populated based on your selections of Merchant Level and Company number. Once you have completed all the information in the Step 1 screen, click the **Next** button.

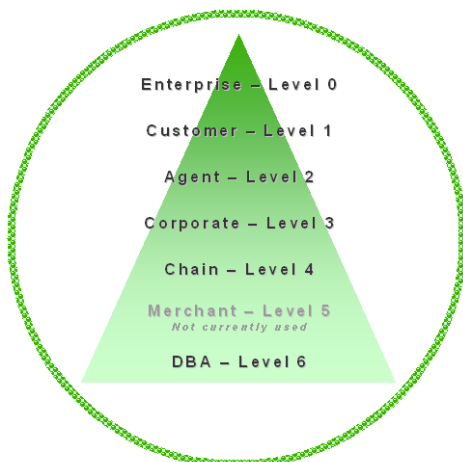
The iPAY Gateway Merchant Hierarchy

Approximately 80% of the iPAY Gateway merchants will be set up at the Chain (4) level. Only larger merchants or Agent Banks will be set up at a higher level. In most cases, Agent Banks will have their merchants set at the Chain (4) level and they will be set at the Agent (2) level.

Please note that the iPAY Gateway does not currently use Merchant Level 5. This is not an option for selection.

If you have any questions about which level you should select for your users, please contact Merchant Services at 1-866-704-4729.

Figure 4 – iPAY Gateway Merchant Levels



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2.1.3 Role Assignments

In this section, you assign roles to the new user. The roles grant access to the various iPAY Web-based applications. Individual roles have been created for each privilege, but custom roles that “bundle” privileges can be created, which can make it easier to administer users. The roles that appear in the Role Assignments section depend on the group to which the user belongs.

Figure 5 - Add User (Step 2) Page

Add User (Step 2)

Role Assignments

Role Name	Role Description
<i>Test Group</i>	
<input type="checkbox"/> + Custom Content - Portal	Create custom user-defined data fields
<input type="checkbox"/> + Reporting - Web Reports	Web Reports reporting
<input type="checkbox"/> + Search - Portal	Perform reporting in Terminal application
<input type="checkbox"/> + Terminal Transact - Portal	Perform transactions in Terminal application
<input type="checkbox"/> + User Administration	User administration

Company Numbers for Terminal Processing:

< Back Next > Cancel

For a complete description of the roles and how to manage them, see Section 4. For details about managing groups, see Section 3.

Company Number for Terminal Processing

If this user will be using the Payment Solutions Portal Terminal for processing transactions or reporting, enter the company numbers that the user is allowed to access in the *Company Numbers for Terminal Processing* field. Separate multiple company numbers with a comma.

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2.1.4 Confirm Selections

Once you have completed the information in Step 1 and Step 2, you will be able to preview the new user profile before saving it.

Figure 6 - Confirm New User Profile

Add User Preview - John Tester (Step 3)

User Attributes

User Name: **jttester** Zone: **External**
Job Title: **Tester** Status: **Active**
First Name: **John**
Last Name: **Tester**
E-mail Address: **jttester@ipay.com**
Group: **Test Company**

Merchant Attributes

Merchant Level: **Corporate (3)**
Company #: **99999**
Merchant Level Value: **9999**

Role Assignments

Role Name	Role Description
<i>Test Group</i>	
<input checked="" type="checkbox"/> + Custom Content - Portal	Create custom user-defined data fields
<input checked="" type="checkbox"/> + Reporting - Web Reports	Web Reports reporting
<input checked="" type="checkbox"/> + Search - Portal	Perform reporting in Terminal application
<input checked="" type="checkbox"/> + Terminal Transact - Portal	Perform transactions in Terminal application
<input checked="" type="checkbox"/> + User Administration	User administration

Company Numbers for Terminal Processing:
99999

To change your selections in the new user profile before saving it, click the **< Back** button.

To exit the new user profile without saving it, click the **Cancel** button.

To save the new user profile, click the **Finish** button.

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2.2 Search for a User

You can search for a user from the *Menu* or *User List* page by clicking the **Search Users** link, or you can follow the menu path **Users > Search**. The *Search Users* page appears.

Figure 7 - Search Users Page



The screenshot shows the top navigation bar with the Planet Payment logo and 'AppSecure' text. Below the navigation bar, there are tabs for 'Users' and 'Roles'. The main content area is titled 'Search Users' in orange. The search form includes a 'Search By:' section with five radio button options: 'User Name¹', 'First Name¹', 'Last Name¹', 'Group Name¹', and 'Company Number²'. Below this is a 'Search Criteria:' section with a text input field and a 'Go' button. Footnotes at the bottom explain the superscripts: ¹ Enter full or partial search criteria. and ² Enter exact company number to search on.

Select the radio button next to the criteria you would like to use for your search. You can search by user name, first name, last name, group name, or company number.

For the first four choices, you can enter the full name or part of the name. If you want to search on a particular company number, you must enter the exact company number for the search.

Enter the criteria in the *Search Criteria* field and click the **Go** button.

Results are displayed in a *User List* page. You can edit users from the *User List* page if you wish (see following section).

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2.3 Edit a User

You can access the user list either by clicking the **List All Users** link on the *Admin Menu* page or you can follow the menu path **Users > User List**.

A list of all the users you can administer is displayed. If the list is too long, you can search for a particular user (see previous section).

Figure 8 - Sample *User List*

	User Name	First Name	Last Name	Title	Email Addr	User Status	Merch Level : Value	Base Company	Group Name	Internal Ind	Last Login Date	Pwd Last Changed	Is Admin
Edit	jtester	Jay	Tester		jtester@domain.com	Password Expired	Chain(4) : test	8990	Accounting	Internal	Never	Never	A

Users 1 to 1 of 1

You can click on the following column headings to have the list sorted by that column: User Name, First Name, Last Name, Title, Email Addr, Merch Level: Value, and Group Name.

New users who have just been created and who have not yet accessed an iPAY application will have a User Status of “Password Expired.” After they reset their password with their first logon, this status will change to “Active.”

To modify a user’s account, click the **Edit** link in the left-most column. The *View User* page is displayed.

Figure 9 - *View User Page*

View User - iPAY Test

[Edit this user](#) [Delete this user](#)

User Attributes

User Name: **iPAYTest** Zone: **External**
Job Title: **Test** Status: **Active**
First Name: **iPAY**
Last Name: **Test**
E-mail Address: **ipaytest@ipay.com**

To edit the user, click the [Edit this user](#) link. The *Edit User* pages are displayed.

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On the *Edit User* pages, you can change any setting except for the User Name. These pages are nearly identical to the *Add User* pages (Figure 3, Figure 5, and Figure 6). Below are the differences between the *Add User* and *Edit User* pages.

Figure 10 - Edit User Page

Edit User - Joe Smith (Step 1)

User Attributes

User Name:	jsmith	Temporary Password:	<input type="text"/>
Job Title:	<input type="text" value="Application Developer"/>	Confirm Password:	<input type="text"/>
First Name:	<input type="text" value="Joe"/>	Status:	<input type="text" value="Active"/> ▼
Last Name:	<input type="text" value="Smith"/>		
E-mail Address:	<input type="text" value="joe.smith@ipay.com"/>		
Group:	<input type="text" value="iPay"/> ▼	Search	

In the *User Attributes* section, there is a drop-down list for the Status. Accounts can be set to “Disabled” for users who will be out of the office for some time but will be returning (e.g., they may be on short-term leave or vacation). When the person returns, the account can be returned to “Active” status.

If a user has locked him/herself out through three failed logon attempts, the administrator resets the user to “Active” status on this page. The password does not have to be changed when the user is unlocked.

You can **move a user** to a new or different group by clicking the **Search** link, which opens the group search page shown in Figure 12. Search for the desired group and then click the **+User** link to move your user to that group. Click the **[Close]** button to move the user.

NOTE:

If one administrator has created a user and given that user access to all applications, and then that user is being edited by a different administrator who does **not** have access to all applications, the second administrator will only be able to change the user’s access for those applications to which the administrator has access.

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2.4 Move a User to a Different Group

To move a user to a different group, you must change the group selection in the User Attributes section of that user's profile. Follow the steps from the previous section to locate and edit a user profile.

Figure 11 - Group List in a User's Profile

Edit User - Joe Smith (Step 1)

User Attributes

User Name:	jsmith	Temporary Password:	<input type="text"/>
Job Title:	<input type="text" value="Application Developer"/>	Confirm Password:	<input type="text"/>
First Name:	<input type="text" value="Joe"/>		
Last Name:	<input type="text" value="Smith"/>		
E-mail Address:	<input type="text" value="joe.smith@ipay.com"/>	Status:	<input type="text" value="Active"/>

Group:

- iPay Developers
- iPAY East Coast Dev

The group to which the user belongs appears as the default in the drop-down list in the user's profile. Any other groups shown in the drop-down list are the subgroups associated with the parent group.

If the user is an administrator, then he or she has administrative rights to all users in all groups and subgroups shown in the drop-down list.

To change the level of access an administrator has, you have to move the administrator to the correct group or subgroup. In the sample administrative user shown above, he is a member of the iPAY Gateway Developers group, which gives him administrative access to all members of the iPAY Gateway Developers group and the iPAY Gateway East Coast Dev group, which is a subgroup of the iPAY Gateway Developers group.

If you wanted to restrict the administrator's access to just the iPAY Gateway East Coast Dev group, you would move the administrator to the iPAY Gateway East Coast Dev group. Moving the user to this subgroup **replaces** the access that he previously had with the iPAY Gateway Developers group. Remember that a user can only belong to **one** group.

If you wanted to increase the administrator's access, then you would add the user to the parent group of iPAY Gateway Developers, which is the iPAY Gateway group. Adding the administrative user to this group replaces the access that he had with the iPAY Gateway Developers group and gives the administrative user access to all users in the iPAY Gateway, iPAY Gateway Developers, and iPAY Gateway East Coast Dev groups.

Note: An administrator cannot add a user to a group to which the administrator does not belong or have administrative rights. In other words, an administrator can grant access **up to** his or her level of access but not beyond.

If the user is **not** an administrator of other users, the display shows the group the person belongs to and also shows the subgroups, if any, associated with the parent group to which the user belongs. However, this does not mean the user is a member of those groups. The user is only a member of the group that is displayed as the default or selected group in the *Group* drop-down list. The rest of the groups listed in the drop-down have **no relevance** to regular, non-administrative users.

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2.5 Delete a User

To delete a user, you must first find the user either by using the Search function (see Section 2.2) or by viewing the entire list of users (click **List All Users** on the *Admin Menu* page [Figure 2]).

Once you have located the user, click the **Edit** link in the left-most column of the user list. The *View User* page appears (Figure 9). Click the [Delete this user](#) link. A confirmation pop-up appears asking you to confirm that you want the user deleted. Click **Yes** to delete and **No** to cancel the action.

Once a user is deleted, the user profile cannot be retrieved.

2.6 User Names and Passwords

User names must be between 5 and 25 characters in length. The user names are allowed to use alphanumeric characters and the period (.), underscore (_), and “at” symbol (@). These three are the only special characters allowed. User names are **not** case sensitive.

Passwords must be between 8 and 25 characters in length and must contain at least one numeric, one upper case, one lower case, and one special character. Special characters are the symbols above the number keys on a standard keyboard. **Passwords are case-sensitive** and must be changed every 90 days (users will be prompted to change them).

Users are required to change their password the first time they log on and the first time after their password has been reset by an administrator. This ensures that only the user knows the password, which protects against fraud.

Users' accounts will be locked after three failed attempts to log on, and an administrator will have to unlock the account (see page 9).

User accounts that are inactive for more than 60 days will be marked as expired. The administrator can access the account and change the status to active again if needed (or delete the user profile).

2.6.1 Changing Passwords

Administrators can change **users'** passwords by

- Finding a user in the user list and then editing the users' settings.

Administrators can change **their own passwords** by

- Clicking the Change My Password link on the right-hand side of the Login page.
- Clicking the Change My Password link in the Admin Menu.
- Following the menu path Tools > Change My Password.

Users can change their passwords when they are in any of their permitted applications. For example, if a user is in MWEB, he or she can follow the link in MWEB to change his/her password. The password is centrally managed for all applications and so is changed globally for all permitted applications.

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3. Manage Groups

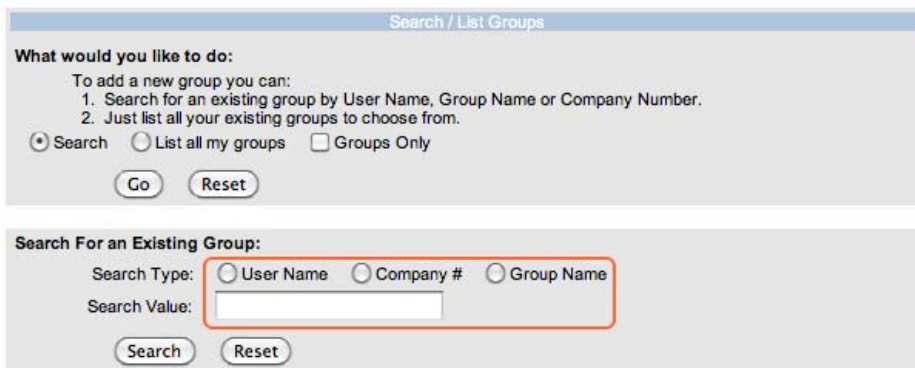
Groups are used to administer users, and every user must be assigned a user group. When your iPAY Gateway account is created, one user group is created for your company, and that user group can be assigned to all your users if you want them to all have the same administrator. If you have a large company with many employees or more than one location, you might want to group different employees under different administrators. You can do this by creating different groups and then assigning users to the groups.

To add a group or manage the users, click the **Search Groups** link on the main menu page (see Figure 2).

3.1 Search for a Group

In the *Search/List Groups* pop-up window, you can select **Search for a group** or **List all my groups**.

Figure 12 - *Search/List Groups* pop-up window



If you select **List all my groups**, just click the **Go** button. No additional search criteria need to be entered.

If you select **Search for a group**, you must select a Search Type and enter additional search criteria before clicking the **Search** button.

No matter which search you perform, you can move users or add groups in the screens that are returned with your search.

Search tips:

If you are searching for a group by user name or group name, you can enter a partial name.

Remember that the user name is the user's **log in** name, which may or may not contain the user's actual first or last name, depending on how you set up your users. For example, John Doe might have a user name of **john**doe. Searching on a user name returns a listing of all groups containing members whose user name matches or *partially* matches the search criteria.

If you are searching for a particular company number, you must enter a complete company number. The company number is the iPAY Gateway -assigned number identifying your company in the iPAY Gateway system. Searching on a company number returns a listing of all groups containing members whose base company number matches the search criteria.

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Figure 13 - Sample Group Search Results

Search Results:						
Group Name	Group Description	View Members	User Name	First Name	Last Name	Base Company
Cheers 1	Cheers 1	+Members				
			coach	Coach	?	90110
			Diane	Diane	Chambers	90110
			Frasier	Frasier	Crane	90110
			Rebecca	Rebecca	?	90110
			Robin	Robin	Coldord	90110
			SamMalone	Sam	Malone	14007
Cheers 2	Cheers 2	+Members				
Cheers 3	Cheers 3	+Members				
Cheers 4	Cheers 4	+Members				
			Carla	Carla	Tortelli	90110
			CliffClaven	Cliff	Claven	90110
			Eddie	Eddie	Tortelli	90110
			Harry	Harry	Houdini	90110
			Lileth	Lileth	Crane	90110
			NormPeterson	Norm	Peterson	14007
			Woody	Woody	Harrelson	90110

[Show >> Add a New Group](#)

You can view or hide the members of a group by clicking [+Members](#).

3.2 Add a Group

To add a new group, click the **Show >> Add a New Group** at the bottom of the *Search Results* page.

Figure 14 - Add a New Group

[Show >> Add a New Group](#)

Add a New Group:	
Group Name:	<input type="text" value="Type in the name of your new group"/>
Group Description:	<input type="text" value="Type in the description of your new group"/>
Parent Group:	<input #"="" type="text" value="Click the Group Name in the search results"/>
<input type="button" value="Create"/>	

In the *Add a New Group* box, type in the name and description of the new group.

To select the parent group to which the new group will belong, click on a linked Group Name in the *Search Results* page (see Figure 13). The group name appears in the *Parent Group* field.

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When you have completed your selections, click the **Create** button. A confirmation message appears.

After you have added a group, you can move users into the group using the functions described on the previous pages or through the *Edit User Account* page (see page 9).

Companies with a large number of employees or locations can set up any number of subgroups. The parent group for each subgroup must be selected carefully as it affects the administrator's access. Please see the explanation on the following page.

3.3 Group Levels and Administrator Access

Remember that the purpose of creating groups in App Secure is to organize users under an administrator. The administrator's access to the users is controlled by the group in which the administrator is placed. To give an administrator access to more users, move him or her to a group that is higher in the hierarchy. To narrow the number of users an administrator can edit, move the administrator to a group that is lower in the hierarchy.

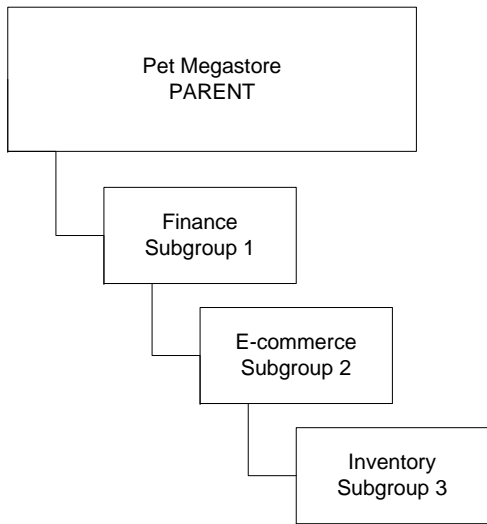
App Secure user groups are for administrative purposes only. They do not affect a user's access to the Payment Solutions Portal Terminal, etc. That access is established by selecting a role in the user's profile (see Section 2.1.3).

To move a user to a different group, see Section 2.4.

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The diagram below illustrates the two ways that subgroups can be set up under parent groups and how this affects the administrators' access to users.

Figure 15 - Parent and Subgroup Models and Administrator Access

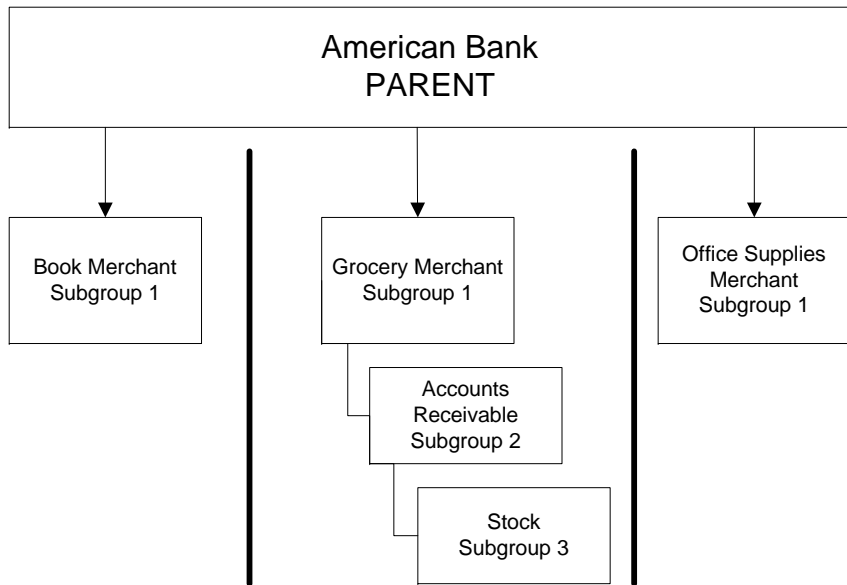


In the model above, any administrator in the parent group can administer all users in all groups below him/her.

Administrators in subgroup 1 can administer all users in Finance, E-commerce, and Inventory. However, they cannot administer users in the Parent group.

Administrators in E-commerce can administer users in E-commerce and Inventory.

Administrators in Inventory can administer only those users in the Inventory group.



In this model, any administrator in the parent group can administer all users in all groups below him/her.

Administrators in any subgroup 1 can only administer their own users. For example, a Book Merchant administrator can create or change Book Merchant users, but he/she cannot see or administer any Grocery Merchant or Office Supplies users.

Any merchant below the parent can create his or her own tier of subgroups.

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4. Manage Roles

Roles are used to assign permissions to users. A role can include a single privilege or many privileges.

App Secure is set up so that each privilege has its own role. However, you can create new roles for different groups of users that include many privileges, which can make it easier to assign access to users according to job function.

To change the privileges for a role or create a new role with different privileges, see Section 4.2.

4.1 View Roles

To view all roles, click **View Roles** on the main menu page.

Figure 16 - View Roles page

View Roles

[Add Role](#)

Roles	
Role Name	Role Description
<i>iPay Group</i>	
Custom Content - Portal	Portal Custom Content in Portal
Reporting - Web Reports	Reporting - Web Reports
Search - Portal	Search and Reporting in Portal
Terminal Transact	Submit transactions in Portal
User Administrator	User Administrator

All roles for the group to which you belong are displayed. If you are in a parent group that includes subgroups, all roles for all groups are listed. However, the roles are not displayed in a manner that reflects the group hierarchy. To see which group a particular role belongs to, you have to click the linked **Role Name**.

To view the privileges for a role, click the linked **Role Name** (see following page).

To add a role, click the [Add Role](#) link and see Section 4.2.

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Figure 17 - Role Privileges

View Role

[Edit this role](#) | [Delete this role](#)

Role Information	
Role Name:	Terminal Transact - Portal
Role Description:	Allows user to submit transactions thru the Terminal
Group Name:	iPay

If you have permission to edit or delete roles, this option is shown at the top of the view. See Sections 4.2.1 and 4.4.

Role Privileges	
Privilege	Permit
<i>Terminal</i>	
Member Number Lookup (single company)	<input checked="" type="checkbox"/>
Member Number Lookup (multiple companies)	<input checked="" type="checkbox"/>
Auto-Popup receipt	<input checked="" type="checkbox"/>
Ask to VOID a transaction	<input checked="" type="checkbox"/>
Auto-VOID a transaction	<input checked="" type="checkbox"/>
Ask to Capture a Pre-Auth	<input checked="" type="checkbox"/>
CC - Authorization	<input checked="" type="checkbox"/>
CC - Capture	<input checked="" type="checkbox"/>
CC - Sale	<input checked="" type="checkbox"/>
CC - Void (Capture / Sale)	<input checked="" type="checkbox"/>
CC - Refund	<input checked="" type="checkbox"/>
CC - Void (Refund)	<input checked="" type="checkbox"/>
ACH - Sale	<input checked="" type="checkbox"/>
ACH - Void (Sale)	<input checked="" type="checkbox"/>
ACH - Refund	<input checked="" type="checkbox"/>
ACH - Void (Refund)	<input checked="" type="checkbox"/>

This role gives users permission for the various functions of the Payment Solutions Portal Terminal.

To change the permissions for this role, see the [edit role](#) section.

To create a new role that contains a subset of these functions, see Section 4.2.

[Add Users](#) | [Remove Users](#)

Role Users		
All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z		
showing 1 to 2 << Prev Next >>		
User Name	Full Name	E-mail Address
jtester	John Tester	john.test@ipay.com
jdoe	Jane Doe	jane.doe@ipay.com
showing 1 to 2 << Prev Next >>		

Users of this role are displayed at the bottom of the *View Role* page.

You can click the linked **User Name** to view the user's profile. This view is similar to the one shown in Figure 6. If you are an administrator, you have the option to edit the user's profile or delete the user from this role.

To add or remove a user from a role, see the following page.

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4.1.1 Add/Remove User to/from a Role

To add or remove a user from this role, click the [Add Users](#) or [Remove Users](#) link shown in Figure 17 on the previous page. All users *in your group* are displayed.

Figure 18 - Add Role Users Page

Add Role Users

Role Name: Terminal Transact - Portal

- Selected Users		
User Name	Full Name	Email Address

Users

[All](#) [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)

[Check All](#) | [Clear All](#) showing 1 to 25 | << Prev | [Next >>](#)

User Name	Full Name	Email Address
<input type="checkbox"/> JTester	John Tester	JohnTester@PayByTouch.com
<input type="checkbox"/> SDoe	Sue Doe	SueDoe@PayByTouch.com
<input type="checkbox"/> TSmith	Tom Smith	TomSmith@PayByTouch.com

[Check All](#) | [Clear All](#) showing 1 to 25 | << Prev | [Next >>](#)

To add or remove a user, select the check box next to appropriate User Name. If you are adding or removing multiple users from more than one displayed page, the selected users are added to the *Selected Users* section at the top of the page as you page through the list of names. Once you have made all your selections, click the **Add Users** or **Remove Users** button. Click **Cancel** to exit from the page without adding or removing any users.

You can also add or remove a user to/from a role through the individual user's profile. See Section 2.1.3.

For some roles, company numbers must be specified for a user in his or her permissions. If company numbers are required, you are prompted to enter them when you try to add a user to that role.

Figure 19 - Add Company Number

The following users require process company #s:

Role Users
User Name
jtester
jdoe

Click the linked user name and enter the company numbers in the user's profile (see Section 2.1.3).

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4.2 Add a Role

To add a new role, follow the menu path Roles > Add a Role, or select Add a Role from the main menu, or go to Roles > View Role and click the [Add Role](#) link.

Add Role

Role Information	
*Role Name:	<input type="text"/>
*Role Description:	<input type="text"/>
Group Name:	iPay

Privilege	Permit
Administration Check All Clear All	
Add System-Wide Customer Service Note	<input type="checkbox"/>
Conbr unrestricted on Quick Search	<input type="checkbox"/>
User Security Check All Clear All	
Administrator	<input type="checkbox"/>
Login as another user	<input type="checkbox"/>
Custom Content Check All Clear All	
Custom User Data Fields	<input type="checkbox"/>
Emails Check All Clear All	
View Email Templates	<input type="checkbox"/>
Add / Modify Email Templates	<input type="checkbox"/>
Delete Email Templates	<input type="checkbox"/>
View / Search Sent Emails	<input type="checkbox"/>
Resend Sent Emails	<input type="checkbox"/>
Products & Billing Templates Check All Clear All	
View Products & Billing Templates	<input type="checkbox"/>
Add / Modify Products	<input type="checkbox"/>
Delete Products	<input type="checkbox"/>
Add / Modify Billing Templates	<input type="checkbox"/>
Delete Billing Templates	<input type="checkbox"/>
Pay Pages Check All Clear All	
View Pay Pages	<input type="checkbox"/>
Add / Modify Pay Pages	<input type="checkbox"/>
Delete Pay Pages	<input type="checkbox"/>
View Images	<input type="checkbox"/>
Upload Images	<input type="checkbox"/>
Delete Images	<input type="checkbox"/>
Search & Reporting Check All Clear All	
Search - Credit Card Transactions	<input type="checkbox"/>
Search - ACH Transactions	<input type="checkbox"/>
Search - Recurring Transactions	<input type="checkbox"/>
Report - Rebill History	<input type="checkbox"/>
Report - Rebill Forecast	<input type="checkbox"/>
Report - Expiring Cards	<input type="checkbox"/>
Report - Active Schedules	<input type="checkbox"/>
Report - Cancelled Schedules	<input type="checkbox"/>
Restrict CCI/ACH searches by user	<input type="checkbox"/>
Terminal Check All Clear All	
Member Number Lookup (single company)	<input type="checkbox"/>
Member Number Lookup (multiple companies)	<input type="checkbox"/>
Auto-Popup receipt	<input type="checkbox"/>
Ask to VOID a transaction	<input type="checkbox"/>
Auto-VOID a transaction	<input type="checkbox"/>
Ask to Capture a Pre-Auth	<input type="checkbox"/>
CC - Authorization	<input type="checkbox"/>
CC - Capture	<input type="checkbox"/>
CC - Sale	<input type="checkbox"/>
CC - Void (Capture / Sale)	<input type="checkbox"/>
CC - Refund	<input type="checkbox"/>
CC - Void (Refund)	<input type="checkbox"/>
ACH - Sale	<input type="checkbox"/>
ACH - POP Sale (Swipe)	<input type="checkbox"/>
ACH - Void (Sale)	<input type="checkbox"/>
ACH - Refund	<input type="checkbox"/>
ACH - Void (Refund)	<input type="checkbox"/>
ACH Image Capture	<input type="checkbox"/>
Customer Insert	<input type="checkbox"/>
Customer Modify	<input type="checkbox"/>
Customer Delete	<input type="checkbox"/>
Account Insert	<input type="checkbox"/>
Account Modify	<input type="checkbox"/>
Account Delete	<input type="checkbox"/>
Schedule Insert	<input type="checkbox"/>
Schedule Modify	<input type="checkbox"/>
Schedule Delete	<input type="checkbox"/>
Schedule Replace	<input type="checkbox"/>
Reporting Check All Clear All	
Reporting - Web Reports	<input type="checkbox"/>

Enter a name for the new role.

Enter a description for the new role.

Select the privileges you want users assigned to this role to have.

If you do not want a user to have permission for a particular function, do not select that function.

Note: If a user is assigned to more than one role, and he/she is given a particular privilege in one role, he or she will have that privilege regardless of privileges granted or not granted in any other roles assigned. **It is the administrator's responsibility to monitor user privileges to ensure that his/her users are granted the correct access.**

See the following page for complete descriptions of the Terminal privileges.

When you have completed selecting the privileges for this role, click the **Save** button to save the new role. If you do not want to save the new role, click the **Cancel** button.

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4.2.1 Terminal Privileges

Descriptions of each terminal privilege shown in the figure on the previous page are given below. In the *Terminal* privileges section, you assign privileges to a user who will be processing transactions through the Payment Solutions Portal Terminal. Please see the *Payment Solutions Portal User Manual* for additional information on all these functions. The privileges below apply to the Terminal functions only.

Member Number Lookup (single company)

The Portal offers a search on Member Number. When this option is selected and the user executes a Member Number search, the search is performed only for the company number displayed on the *Search* page. The *Member Number Lookup* function returns the last transaction for that company number with the associated Member Number.

Member Number Lookup (multiple companies)

When this option is selected and the user executes a Member Number search, the search is performed for all company numbers for which the user has been authorized to process transactions (see page 7).

Note: If both *Member Number Lookup* privileges are selected, the multiple lookup overrides the single lookup, and the user can search across all companies numbers that he/she has access to.

If *neither* of the *Member Number Lookup* privileges is selected, the user will not have access to the *Member Number Lookup* function.

Auto-Popup Receipt

If this option is selected, the receipt for a successful transaction pops up in a new window when the transaction is submitted. If this option is not selected, the user must click on the [Show Receipt](#) link in the Terminal.

Ask to VOID a Transaction

If this option is selected, a pop-up dialog box will appear **asking if the user wishes to void** a transaction when the AVS or CVV response is not an exact match.

This pop-up window only appears when the following conditions are met:

- The transaction is a SALE or CAPTURE
- The transaction is otherwise successful (i.e., the only problem is the AVS or CVV response)
- An AVS check is performed, and the AVS response is not null or is not an exact match.
- CVV is not a match

Auto-VOID a Transaction

Selecting this option tells the iPAY Gateway system to automatically void a transaction based on the above conditions.

Note: If both *Ask to VOID* and *Auto-Void* privileges are selected, the **Auto-Void setting overrides** the *Ask to VOID* setting, and all transactions meeting the VOID criteria bulleted above are automatically voided and are **not submitted** for processing.

If *neither* of the *VOID* privileges is selected, no transactions are voided for failing AVS or CVV criteria and are submitted for processing. If, upon review of the transaction result message onscreen, the user does not wish to proceed with the transaction, he/she must search for the transaction and void it manually.

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Ask to Capture a Pre-Auth

If this option is selected, when a successful authorization transaction is submitted through the Payment Solutions Portal Terminal, a pop-up window will appear, asking the user if he/she wishes to capture the authorization transaction.

If this option is not selected, the user has to retrieve the authorization transaction using the search feature of the Portal Terminal and then submit the capture transaction.

CC – Authorization through ACH – Void (Refund)

These privileges pertain to user permissions for processing CC and ACH transactions and are self-explanatory. The administrator can select whether a user is allowed to perform different credit card or ACH transactions.

Each transaction privilege is independent of the others. For example, an administrator can elect to give a user permission to perform authorizations, captures, and sales but can choose to deny users of that role the ability to perform refunds or voids.

The privilege “ACH – POP Sale (Swipe)” is for merchants and their users who process ACH point-of-purchase (POP) transactions, where a check is swiped through a check-reading device. If this privilege is not assigned, the “Swipe Check” button will not appear in the Terminal.

If the merchant has also signed up for the check image service (an option with POP processing), then “ACH Image Capture” is assigned to the merchant to allow the capture of images when the check is swiped.

Customer Insert through Schedule Replace

These privileges pertain to user permissions for recurring transactions and the associated customer, account, and schedule information. Please see the *Payment Solutions Portal User Manual* for complete information about these transactions.

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4.3 Edit a Role

Roles can be edited by going to the *View Roles* page, selecting a role, and then clicking the [Edit Role](#) link at the top of the page (see Section 4.1 and Figure 17). A page similar to that shown in **Error! Reference source not found.** is displayed. Make your edits and then click the **Save** button. Note that everyone who has been assigned that role will have his/her permissions changed as soon as the modifications are saved.

4.4 Delete a Role

Roles can be deleted by going to the *View Roles* page, selecting a role, and then clicking the [Delete Role](#) link at the top of the page (see Section 4.1 and Figure 17).

Note: If you do not see this link, it means you do not have permission to perform this function.

A confirmation pop-up message appears, asking if you are sure you want to delete the role. If you wish to proceed and delete the role, click the **Yes** button. If you do not want to delete the role, click the **No** button.

Note: All users must be removed from a role before it can be deleted. The system does not permit deletion of a role that has users attached to it. An error message is displayed if you try to delete a role that has users.

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5. Log Off

To log off the App Secure application, you can simply close your browser, or you can follow the menu path **Tools > Log Off**.

Figure 20 - Logging Off



This returns you to the *Login* page (see Figure 1).

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7. Revision History

Date	Section and name	Description of change
08-Nov-2004	Created document	Version 1.0
19-May-2005	Entire document	Revised entire document to include all applications, not just Web Reports users. Renamed. Version 2.0
26-May-2005	Edit Existing User	Added information about moving user to a different group on this page. Version 2.1
09-Feb-2006	Document	Rearranged sections to group all user functions under Manage User chapter
09-Feb-2006	Section 4	Added sections to describe new Role functionality
09-Feb-2006	Document	Updated figures as needed. Version 3.0
16-Feb-2006	Section 2	Added text and screen shot for deleting a user.
26-Apr-2006	Section 4	Added information about new roles and privileges for new functions in the Portal.
05-May-2006	Document	Version 3.1 DRAFT released.
17-Jul-2007	1.1 Log In	Changed URL from iPAY to PBTPS. Updated text and logos from iPAY to PBTPS. Version 3.2 DRAFT released.
04-Oct-2007	4.2 Add a role	Updated screen shot of the <i>Add Role</i> page (figure 20).
04-Oct-2007	4.2.1 Terminal privileges	Added text explaining the ACH – POP Sale (Swipe) and ACH Image Capture privileges.
04-Oct-2007	Document	Version 3.3 DRAFT released.
15-Nov-2007	2.1.3 and 4.0	Revised text to indicate that each privilege has its own role. Version 3.3 released.
26-Jan-2009	Document	Changed references from iPAY to Planet Payment.
7-May -2009	Section 1	Change to URL
28 - Oct - 2009	Document	Screen prints
June 23, 2014	Document	Remove reference to Web Reports