Dashboard management

Back Office user manual

Document version 1.2

Contents

1. HISTORY OF THE DOCUMENT

Version	Author	Date	Comment
1.2	Lyra Network	5/25/2018	Update the note in the chapter **Viewing the dashboard**
1.1	Lyra Network	1/5/2018	Updated chapter **Viewing the dashboard** with deny reasons categories
1.0	Lyra Network	12/8/2016	Initial version

2. GETTING IN TOUCH WITH TECHNICAL SUPPORT

Looking for help? Check our FAQ on our website

https://payzen.io/de-DE/faq/sitemap.html

For technical inquiries or support, you can reach us from Monday to Friday, between 9am and 6pm

by phone at:

0811708709 Service fee 0.06 € / min + call charge

by e-mail: *support@payzen.eu*

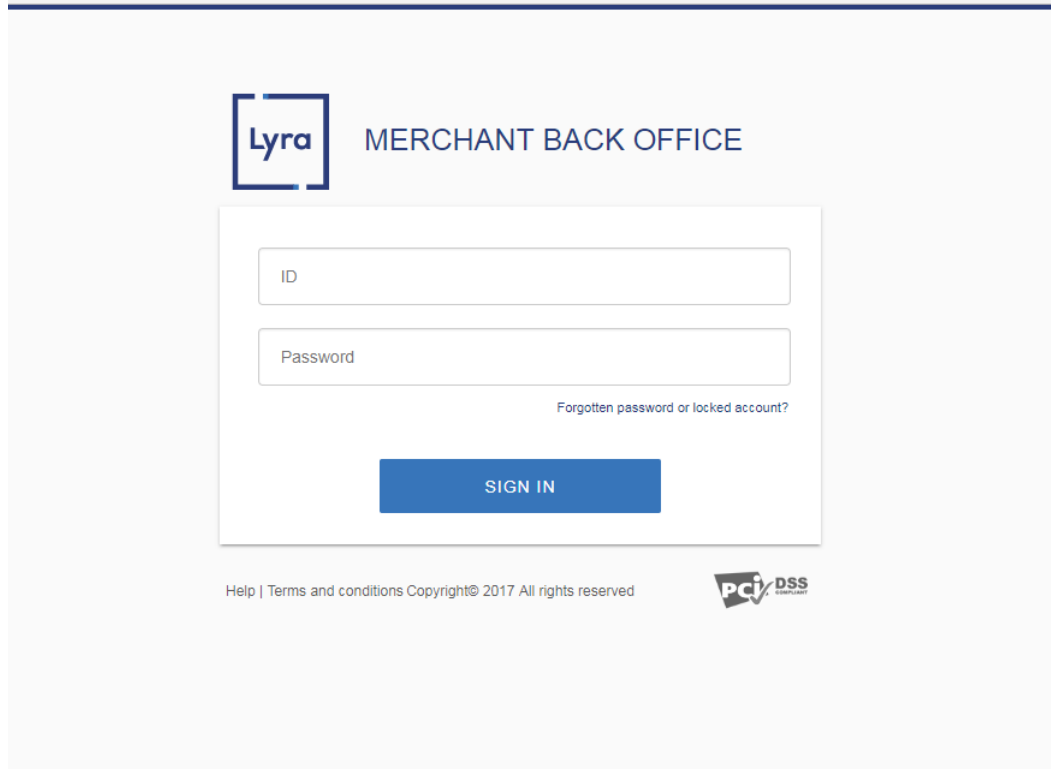via your Merchant Back Office: (Menu: **Help** > **Contact support**

To facilitate the processing of 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**).

3. SIGNING IN TO THE MERCHANT BACK OFFICE

Your Back Office is accessible at the following URL address:

https://de.payzen.eu/vads-merchant/

1. **Enter your login.**

   Your login was sent to you in an e-mail entitled **Connection information - [name of your shop]**.

2. **Enter your password.**

   Your password was sent to you in an e-mail entitled **Connection information - [name of your shop]**.

3. **Click Validate.**

   After 3 password entry errors, the user account is locked. In this case, click **Forgotten password or locked account** to reset the password.
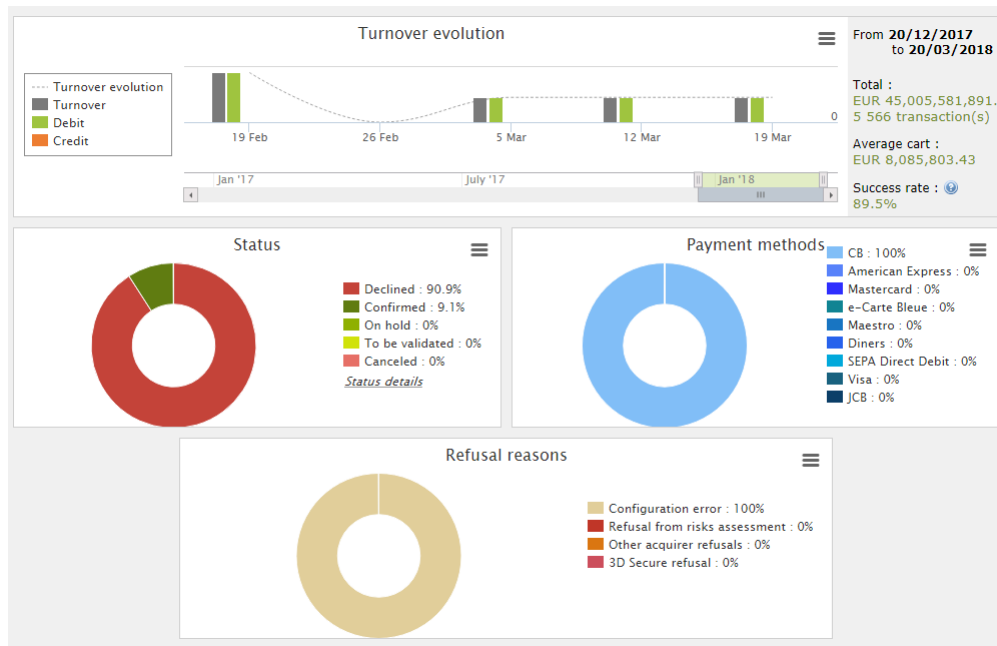
4. VIEWING THE DASHBOARD

> **_Note_**
> _Access to the **Dashboard** requires a configuration. If the **Dashboard** menu does not appear on your Merchant Back Office, please contact l'administration des ventes ._

To display the dashboard, click the **Management** > **Dashboard** menu.

The graphs page appears.

Note

The shops chosen in this dashboard example are in **mono currency** but these graphs work also in **multi currencies** cases.

4 types of data are analyzed:

- **The turnover evolution**

  The graphs are in the histogram form. The data are analyzed and compared over a period.

  The user can, at any time, move the cursor over a period to display as a tooltip the amounts and / or the transactions analyzed in this period.

- **The transaction status**

  The graphs are in circular form. The data are analyzed and compared in real time over the chosen period.

  The user can, at any time, move the cursor to a payment status to display in tooltip the amounts and the transactions concerned.

  The analyzed statutes are:

  - Canceled

  - To be validated

  - Confirmed

  - Failed

  - Pending

- Rejected

- **The payment methods**

  The graphs are in circular form. The data are analyzed and compared in real time over the chosen period.

  The user can, at any time, move the cursor to a payment method to display in tooltip the amounts and the transactions made with this payment method.

- **The refusal reasons**

  The graphs are in circular form. The data are analyzed and compared in real time over the chosen period.

  The user can, at any time, move the cursor to a payment method to display in tooltip the amounts and the transactions concerned by this refusal.

  The refusal reasons analyzed are:

  - 3D Secure abandon

  - Other acquirer refusals

  - Invalid card

  - Lost or stolen card

  - Configuration error

  - Suspected fraud

  - Do not honor

  - Limit exceeded / insufficient provision

  - 3D Secure Refusal

 - Refusal from risk assessment

  - Transaction not allowed

Note

The user can, at any time, apply filters in a graph by clicking on one or more elements of its legend.
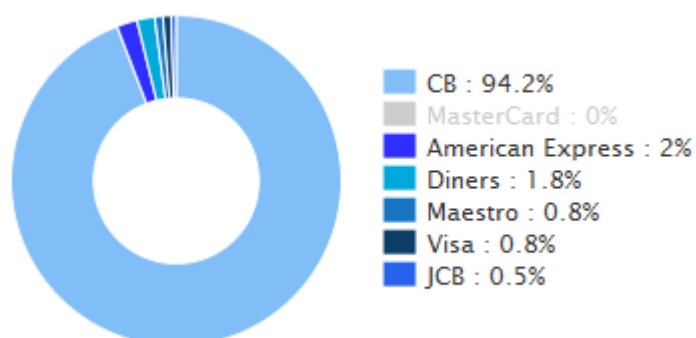
*Example: In this screenshot, the user don't want to analyze the transactions made with **Mastercard**. He clicks on the payment method to set it to zero (**0**) and exclude it from the analysis. he, just, need to click again on the payment method to reintegrate it in the graph.*
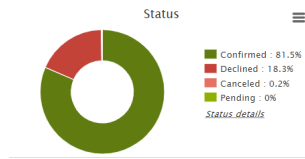
Note

The user can download each graph in PNG, JPEG or SVG format.
Just click on the download icon and choose its format.
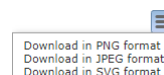
5. VIEWING THE DETAILS OF THE TRANSACTION STATUSES

You have the possibility, in the graph analyzing the statuses of the transactions, to visualize the detail of the statuses.

Click **Status details** to display the detail page.

This page provides more information on the meaning of the analyzed statuses in the graph.

<u>Example</u>

If the graph indicates **Canceled : 0.6%**, the cancellation can have two reasons:

• The capture date is reached but the merchant has not validated the transaction.

• The transaction has been canceled by the merchant.
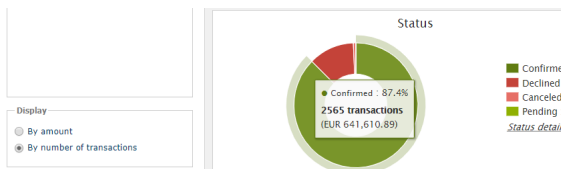
6. CONFIGURING YOUR DASHBOARD DATA
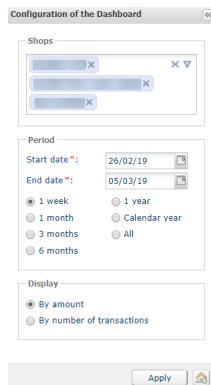
To deepen its analysis, the user can apply filters. Data can be displayed according to:

- the **Shops**
- the **Period**
- the **Display** mode (by amount or by number of transactions)

6.1. Defining the data to analyze in the dashboard

The user can display the graphs by prioritizing either the amount or the number of transactions.

- Check the **By number of transactions** radio button and click **Apply** if you want to display the graphs by number of transactions.

  The percentage and the number of transactions are put forward. The amount is displayed for information in parentheses.

- Check the **By amount** radio button and click **Apply** if you want to display the graphs by transactions amount.

  The percentage and the amount are put forward. The number of transactions is displayed for information in parentheses.

6.2. Defining the shops to analyze

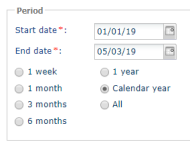The user can analyze one or more shops.
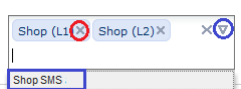
- To remove a shop, click on the cross (**x**) to the right of the shop name.
- To add a shop,
  - click the down arrow in the shops area.

    The list of shops appears.
  - Click on the shop to add.
- To validate your choice, click on the **Apply** button.

6.3. Defining the period to analyze

The user has two options for selecting the period to be analyzed.

1. Select the period among the preset list.

The choice of the period is made in the configuration table.

1. Check the radio button for the period to be analyzed, *1 week*, *1 month*, *3 months*, *1 year*, *calendar year*, etc. the **Start Date** and **End Date** fields update automatically.

2. Or, directly select the **Start Date** and **End Date** of the period to be analyzed.

3. To validate your choice, click on the **Apply** button.
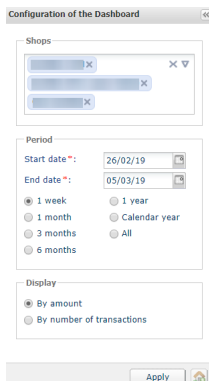
2. Select the period from the graph
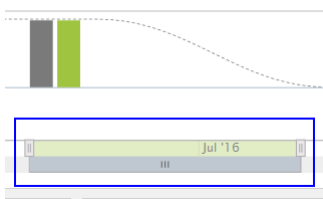
The choice of the period is made in the display area of the evolution of the dashboard.

1. Hold the cursor to the left or right,

2. Swipe right or left to choose the period.

The dashboard updates automatically as soon as the cursor is released.
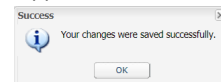
6.4. Using the dashboard as homepage

To use your dashboard as homepage of your Merchant Back Office

• Click on the symbolized icon as below.

A confirmation message appears.

• Click on **OK** to save your changes.

The icon changes appearance and is displayed as below.

The change will be taken into account during the next connection.

To stop using the dashboard as your homepage, simply click on the icon again, confirm and log back in.