



User management

Back Office user manual

Document version 1.4

Contents

1. HISTORY OF THE DOCUMENT.....	3
2. OBTAINING HELP.....	4
3. SIGNING IN TO THE MERCHANT BACK OFFICE.....	5
4. MANAGING USERS VIA THE MERCHANT BACK OFFICE.....	6
4.1. User access management.....	6
4.2. Creating a merchant user.....	8
4.3. Associating privileges with a merchant user.....	9
4.4. Searching for a merchant user.....	11
4.5. Customizing user detail display.....	11

1. HISTORY OF THE DOCUMENT

Version	Author	Date	Comment
1.4	Société Générale	25/03/2019	Create a user : addition of details on the choice of the login
1.3	Société Générale	30/01/2019	Additional details in Associating privileges with a merchant user
1.2	Société Générale	20/10/2018	Additional details in chapters: <ul style="list-style-type: none">• Managing users via the Merchant Back Office• User access management• Associating privileges with a merchant user
1.1	Société Générale	09/07/2018	Additional details in chapters <ul style="list-style-type: none">• Creating a merchant user• Customizing user detail display
1.0	Société Générale	22/03/2017	Initial version

This document and its contents are confidential. It is not legally binding. No part of this document may be reproduced and/or forwarded in whole or in part to a third party without the prior written consent of Société Générale. All rights reserved.

2. OBTAINING HELP

Need some help? Please, check the FAQ on our website

<https://sogecommerce.societegenerale.eu/doc/fr-FR/faq/sitemap.html>

For technical inquiries or support, you can reach us from Monday to Friday, between 9 a.m. and 6 p.m.

by phone at:

0811900480

Service fee 0.06 € / min
+ call charge

by e-mail:

support@sogecommerce.societegenerale.eu

and via your Merchant Back Office, menu **Help > Contact support**

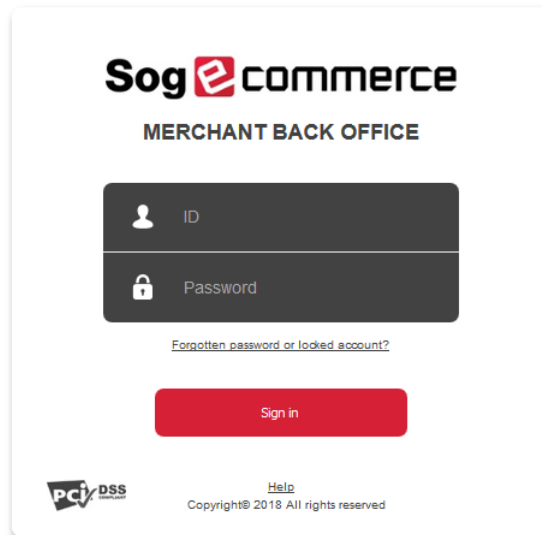
To facilitate the processing of your demands, you will be asked to communicate your shop ID (an 8-digit number) or your MID.

This information (shop ID) 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

Sign in the Back Office:

<https://sogecommerce.societegenerale.eu/vads-merchant/>



The screenshot shows the login interface for the Sogecommerce Merchant Back Office. At the top, the logo 'Sogecommerce' is displayed in black, with a red square containing a white 'e' between 'Sog' and 'commerce'. Below the logo, the text 'MERCHANT BACK OFFICE' is centered. The login form consists of two dark grey input fields: the first is labeled 'ID' with a person icon, and the second is labeled 'Password' with a lock icon. Below these fields is a link that reads 'Forgotten password or locked account?'. A prominent red button labeled 'Sign in' is positioned below the link. At the bottom left, there is a 'PCI DSS' logo. At the bottom center, there is a 'Help' link and the text 'Copyright © 2018 All rights reserved'.

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 on Sign in.

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

4. MANAGING USERS VIA THE MERCHANT BACK OFFICE

1. In the Merchant Back Office, go to **Settings > Company > Users** tab

This tab allows the merchant with necessary permissions to associate privileges with a user that has already been created.

The list of merchant users appears by default. Filter the result using search fields.

Note: *in order to be added to the list of users with privileges in one of the company's shops, a user must be associated with the same provider as the company.*

You can:

- Manage access privileges of a user by right-clicking a username
- Create a new user
- Associate permissions with a user
- View the details of permissions associated with a user
- Search for a user
- Customize column display

Note

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

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

4.1. User access management

There are two options when it comes to assigning users access privileges to the Merchant Back Office:

Basic access with read-only permissions

It is possible to create a user with read-only access and grant them limited permissions in the Merchant Back Office.

The user will be able to only view the details related of the companies and/or shops to which he or she has access.

Even with read-only permissions, a user should have associated privileges in the Merchant Back Office. He or she must have access to at least one shop. Within this shop, he or she must have at least one associated privilege (*view transactions* for example).

However, regardless of the privileges associated with a user with read-only permissions, he or she will be able to only view the information.

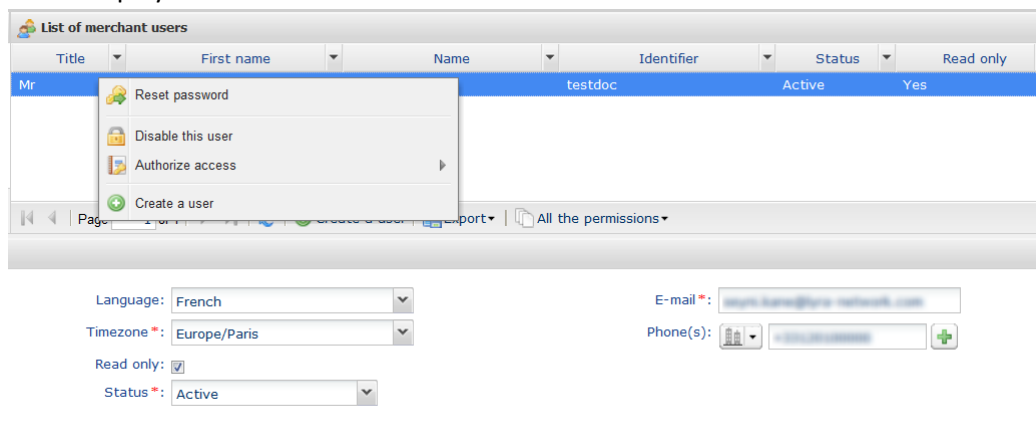
If you wish to not grant any privileges to a user, you should set their account status to **Disabled**.

Access with write permissions

It is possible to grant write permissions to a user. In this case, the user will be able to edit the information to which he or she has access in the Merchant Back Office.

To configure permissions

1. Search for a merchant user
2. Select the user from the list
3. Right-click to display the context menu



Depending on the company's permissions and configuration, you can:

- *Reset the password of the user.*
After the reset confirmation, an e-mail is immediately transmitted to the user to inform him or her of the new connection identifiers. However, the first connection code will be necessary for using the identifiers for the first time.
- *Send the first connection code by SMS.*
For security reasons, only the bank can unlock the first connection code.
- *Enable or Disable a user account.*
*Another way of doing it is to select the user and choose **Active** or **Disabled** in the **Status** field.*
In case of a connection attempt, the user with the disabled account will receive a message saying "**Your account has been disabled. Please get in touch with your sales contact**".
It is possible to reactivate an account by changing its status back to **Active**.
- *Authorize access to the Test and/or Production gateway.*

4. Click the **Save** button.

4.2. Creating a merchant user

It is possible to create merchant users and define their permissions for each shop. This function can be delegated to the merchant if he/she has user management privileges.

A user can be multi-company if he/she has several company shops associated with his/her account.

To create a user.

1. Click on the **Create a user** button in the **Users** tab.

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

The creation page appears.

Création d'un utilisateur

Identifiant:	<input type="text"/>	Langue:	<input type="text"/>	E-mail *:	<input type="text"/>
Civilité *:	<input type="text"/>	Fuseau horaire *:	Europe/Paris	Téléphone(s):	<input type="text"/>
Prénom *:	<input type="text"/>	Fournisseur *:	<input type="text"/>		
Nom *:	<input type="text"/>	Lecture seule:	<input type="checkbox"/>		

2. Populate at least the mandatory fields marked with an asterisk.

- **Title**
- **First name**
- **Name**
- **Theme** selected from the list

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

- **Provider** chosen from the list.

The content of the list depends on the permissions of the connected user.

When you create a user via the Merchant Back Office, the **Provider** field does not appear.

- **E-mail**

Please enter a valid e-mail address. Your first connection identifier and password will be sent to this address.

3. Populate the optional fields.

- **Login**

This identifier will be associated with the connection password. A default value is proposed.

Note

*If the **Create a user** button is grayed out although a login has been chosen, this login might already exist. In this case, the user should enter another login or let the system generate a new login automatically.*

- **Language**

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

- **Phone(s)**

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

Using **Read only** allows to define the permission to read/write for a user.

If enabled, the user cannot make any changes. The user can only view information depending on their rights.

5. Click **Create**

You have the possibility to associate access privileges with the company and/or shops when creating a user or associate them later. See chapter Associating privileges with a merchant user on page 9.

4.3. Associating privileges with a merchant user

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.

Note

You cannot grant more permissions than your account has.

*For example, if you do not have the permission to **View transactions**, you will not be able to grant it to somebody else.*

The changes in configuration are taken into account in real time.

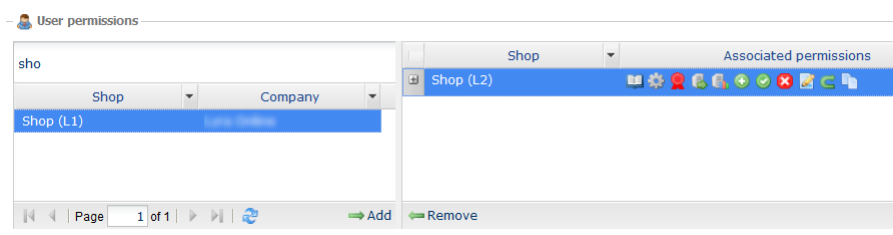
1. Select a user from the user list.

The user privilege management page appears.

2. Enter at least three characters of the shop name you are searching for.

Note: you can use the company label, the shop, the URL or the shop ID.

The shop name appears.



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

4. Select the added shop, then use the right-click.

The privilege management context menu appears.



All the privileges are granted by default.

Note

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

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

The table below describes the different privileges.

Icon	Privilege label	Description
	View transactions	Allows to view the transactions made within a shop. Depending on their privileges, 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.













Icon	Privilege label	Description
	Display keys	Allows to view the Keys tab, regenerate a Test and/or Production key depending on their access privileges. In order to better handle this privilege, 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 privilege, 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 privilege, the user must also have the permission to View transactions .
	Create a payment order	Allows to create 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 phone • via a URL
	Validate a transaction	Allows to manually validate payment transactions in deferred mode. In order to benefit from this privilege, the user must also have the permission to View transactions .
	Cancel a transaction	Allows to cancel one or several transactions that have not reached the capture date. In order to benefit from this privilege, the user must also have the permission to View transactions .
	Change 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 privilege, 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 on a captured transaction. In order to benefit from this privilege, the user must also have the permission to View transactions .
	Duplicate a transaction	Allows to create a new payment based on an existing transaction. This action can be applied on a captured transaction In order to benefit from this privilege, the user must also have the permission to View transactions .
	Manage online payment forms	Allows to access and configure the hosted payment page.
	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 privileges

5. Check or uncheck the boxes with the privileges 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 privileges with all the selected shops.

6. If you wish to revoke the access to one or several shops from your user,
 - a. Select the shop(s)

b. Click **Remove**

7. Click **Save**

4.4. Searching for a merchant user

1. Click on **Settings > Company > Users** Tab.

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

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

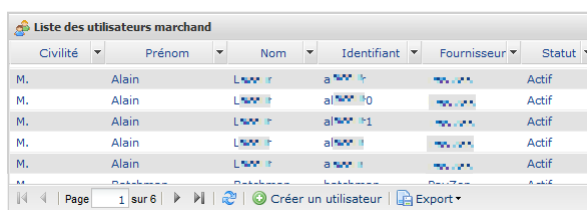
2. Search for the user using the search fields

- **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.

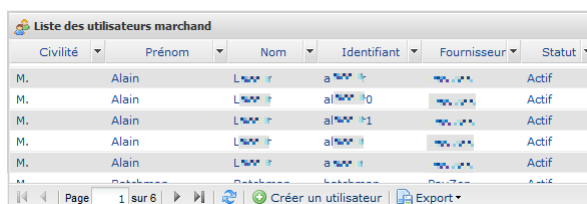
The search result appears in the field **List of merchant users**.



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

4.5. Customizing user detail display

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



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

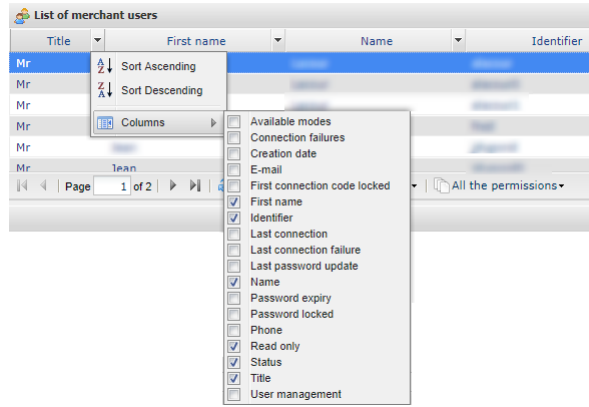
Usually, the columns **Title**, **First name**, **Last name** and **Identifiant** are displayed by default.

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



2. Check or uncheck the desired columns.