



# User Management

## User Guide

Version 1.1  
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## Version Tracking

Version Number	Modification Date	Modified By	Changes Completed
1.00	08-18-2017	Product Development	Initial Documentation Completed.
1.10	07-24-2018	Product Development	Added 'Show Dashboard' Switch.

## Introduction

The admin for each business on the SegPay Merchant Portal can invite others in their organization to create logins and help manage various aspects of the payments process. For each invited user, the admin assigns specific Merchant IDs and URLs, and selects a role which determines the areas within the Merchant Portal the user can access. Those roles include Owner/Admin, Manager, Fraud, Finance, Tech and Customer Service, all of which are explained in our [Merchant Portal User Roles](#) documentation.

## User Management

To view and manage the members of your staff who have created logins and are using the Merchant Portal, just visit the portal at <https://mp.segpay.com>, point your mouse at the *My Account* icon and select **User Management**.

USERNAME	ACTIONS
mpdemo4@segpay.com	<a href="#">Edit</a> <a href="#">Confirm</a>
mpdemo@segpay.com	<a href="#">Edit</a>
mpdemo2@segpay.com	<a href="#">Edit</a> <a href="#">Confirm</a>
mpdemo3@segpay.com	<a href="#">Edit</a> <a href="#">Confirm</a>

You'll see a list of all the users in your company on this page.

On the User Management page you can do the following:

- *Add* a user
- *Edit* a user, to modify his/her access to specific areas of the merchant portal
- *Confirm* a user's account

Use the search box in the top-right part of the page to find a specific user. This comes in handy if you have a long list. Just start typing the user's email into the search box and the list will filter dynamically as you type.

## Add a User

To add a new user to the system, click **Add User**.

USERNAME	ACTIONS
User Name <input type="text" value="New User Email Address"/>	<input type="button" value="Create"/> <input type="button" value="Cancel"/>

Enter the person's email address and click **Create**. Or click **Cancel** to quit and go back to the user list.

The person you added will receive an email including a link they'll need to click to confirm the account. When they click, they will be asked to create a password and then login, at which point their account is confirmed.

## Assign Access

After adding a new user (or when editing an existing user) you are asked to select which merchants and websites the user can work on, and assign a role to determine which areas of the merchant portal the new user can access.

Show Dashboard

Merchants	
ID	NAME
<input checked="" type="checkbox"/> 20656	SegPay Technologies 05-13
<input type="checkbox"/> 20654	SegPay USIPSP1022

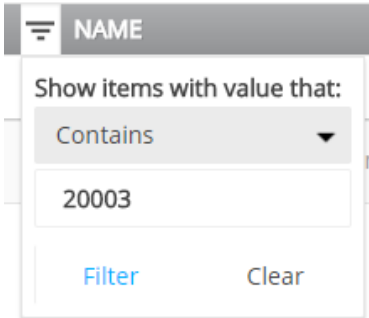
Websites		
ID	DOMAIN	MERCHANT
<input checked="" type="checkbox"/> 12996	www.segpayeu1.com	20656
<input checked="" type="checkbox"/> 12997	www.spEU1020.com	20656
<input checked="" type="checkbox"/> 13112	www.directdebitest...	20656
<input checked="" type="checkbox"/> 13118	qatest0205a0206.com	20656
<input checked="" type="checkbox"/> 13120	QATESTMySegpayEU02...	20656
<input checked="" type="checkbox"/> 13122	www.bigdaddy.com	20656
<input checked="" type="checkbox"/> 13123	blu.ca	20656
<input checked="" type="checkbox"/> 13125	Dansdom.com	20656

Roles	
NAME	INTERNAL ROLE
<input checked="" type="checkbox"/> Merchant Customer Service	false
<input type="checkbox"/> Merchant Fraud	false
<input type="checkbox"/> Merchant Manager	false
<input type="checkbox"/> Merchant Admin (2)	false
<input type="checkbox"/> Merchant Tech Support	false
<input type="checkbox"/> Merchant Finance	false
<input type="checkbox"/> Merchant Admin	false

- **Merchants:** Select the merchant account(s) you want this user to work on.
- **Websites:** The website(s) associated with the selected merchant(s) are displayed. Select the specific sites where this user should have access.
- **Roles:** Select a role that corresponds with the types of tasks this user will be working on. See our Roles doc (linked above) for details on each role and what they can access within the Merchant Portal.
- **Show Dashboard:** Select whether this user should have access to your company dashboard, which shows key stats about your payments. If left un-selected, the user's start page will display our welcome message only, with your billing data hidden.

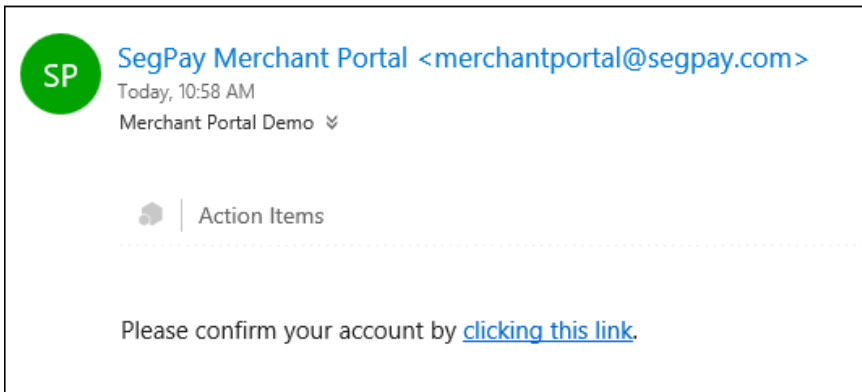
Note that there is no Save button on the page. Selections for merchants, websites and roles are saved automatically as you click a checkbox.

If you have a long list of merchant accounts or websites, you can click the filter icon (inverted triangle) next to any column header to quickly find a specific item in that column. Just type the name or ID you're looking for and click **Filter** (see image below).

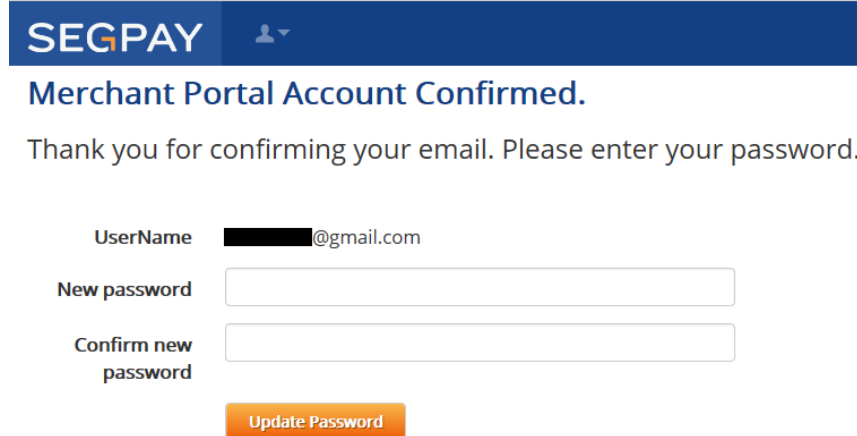



## **Confirm Accounts**

When you add a new user, a confirmation email is sent to their address:



Once they click the link in the email, they are asked to create a password:



SEGPAY 

## Merchant Portal Account Confirmed.

Thank you for confirming your email. Please enter your password.

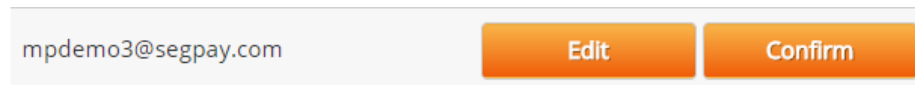
UserName

New password

Confirm new password

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If a user hasn't confirmed his or her account by clicking the link in the confirmation email, or if they haven't received the email, you can confirm their account for them. A **Confirm** button displays next to any user who is still unconfirmed. Click it to immediately confirm the account so the user can access the Merchant Portal.



mpdemo3@segpay.com

Please feel free to let us know any thoughts or suggestions you have about this feature or anything else, by emailing [Techsupport@SegPay.com](mailto:Techsupport@SegPay.com).