



REALCONTROL USER MANAGEMENT

2015

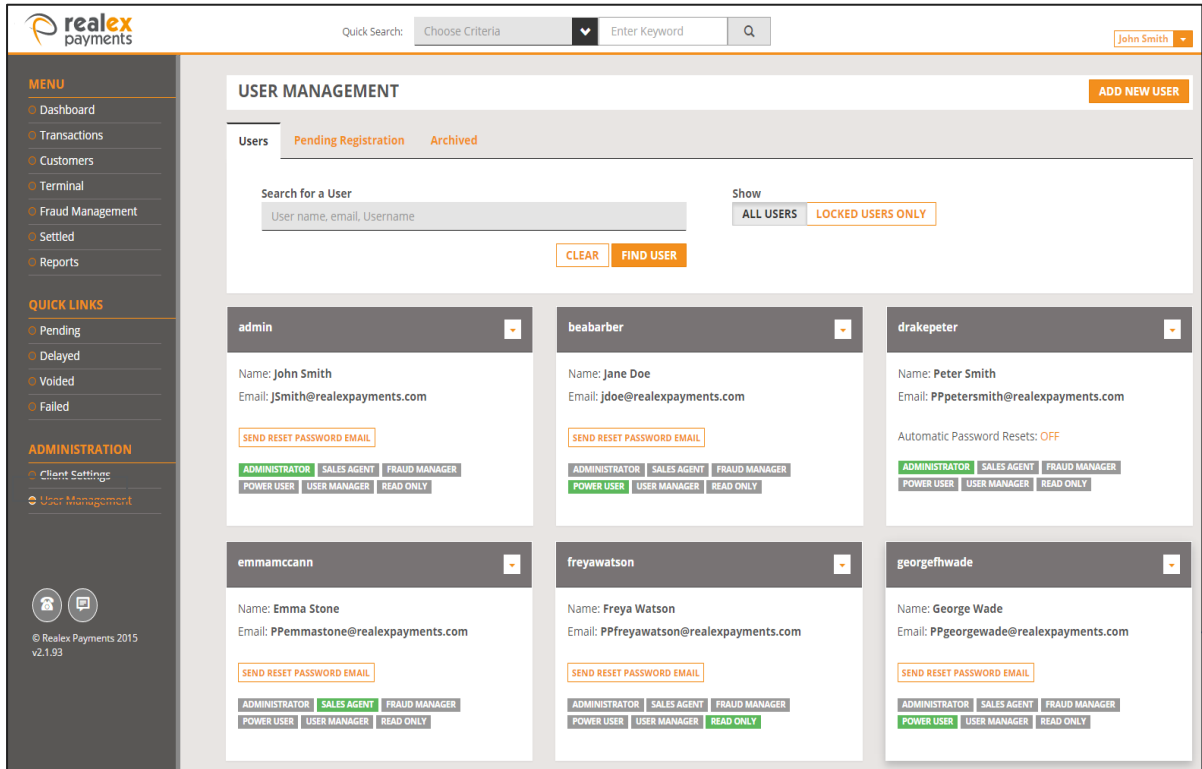
TABLE OF CONTENTS

1. USER MANAGEMENT	3
1.1 ADDING NEW USERS	4
1.2 USER ROLES AND PERMISSIONS	5
2. USER REGISTRATION PROCESS	6
2.1 VIEWING AND EDITING EXISITING USERS	6

1 USER MANAGEMENT

To access the User Management section, you will need to have the **'Administrator'** or **'User Manager'** role assigned to your User Login. These roles are explained in more detail in Section 1.2 of this guide.

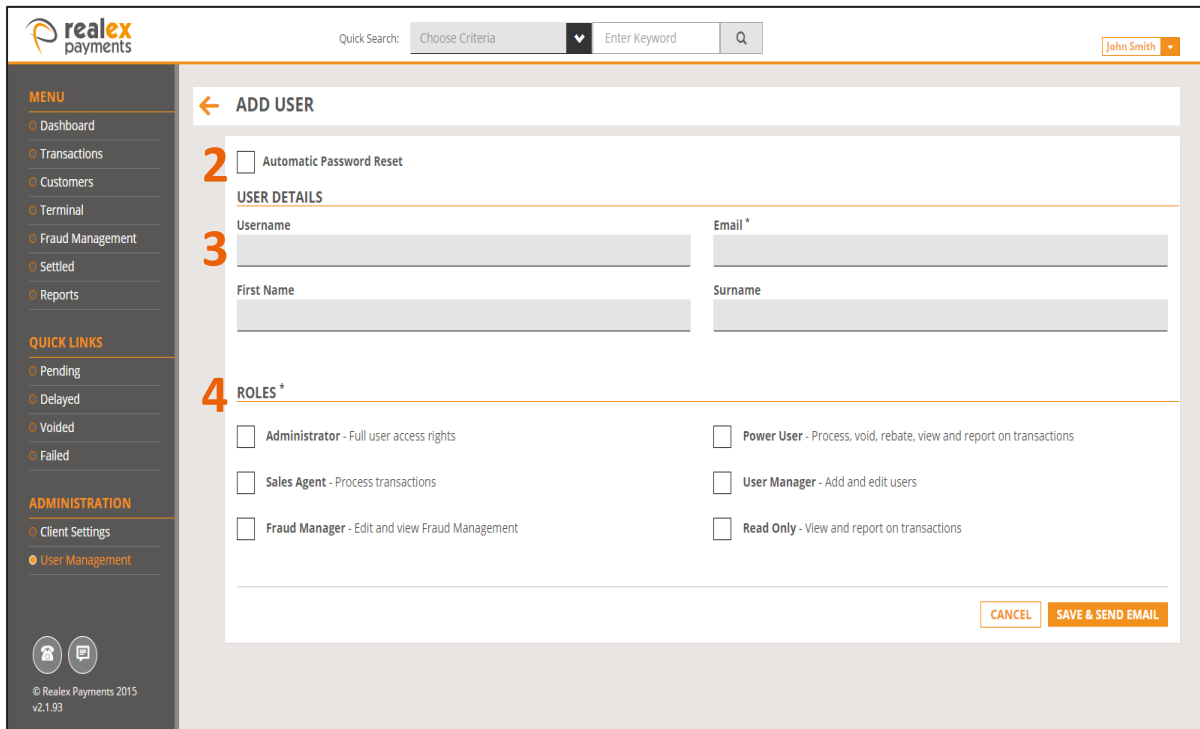
The **'User Management'** section is located under **'Administration'** within the navigation menu.



The screenshot displays the 'USER MANAGEMENT' section of the Realex Payments interface. On the left is a navigation menu with categories: MENU (Dashboard, Transactions, Customers, Terminal, Fraud Management, Settled, Reports), QUICK LINKS (Pending, Delayed, Voided, Failed), and ADMINISTRATION (Client Settings, User Management). The main content area includes a search bar for users, tabs for 'Users', 'Pending Registration', and 'Archived', and a grid of user profiles. Each profile shows the user's name, email, a 'SEND RESET PASSWORD EMAIL' button, and a list of roles (Administrator, Sales Agent, Fraud Manager, Power User, User Manager, Read Only). The user 'John Smith' is currently logged in, as indicated in the top right corner.

1.1 ADDING NEW USERS

1. To create a new User, click on **'Add New User'** on the **'User Management'** screen.
2. On the **'Add User'** screen you can add the **'Automatic Password Reset'** functionality to the user's role by enabling the tick box option. This functionality allows the user to reset their password automatically anytime they wish.
3. You will also need to add the Username, Email, First Name, and Surname of the user you are setting up.
4. The User Role can be chosen within the **'Roles'** section. The user roles are explained on the **'Add User'** screen. For more information on user roles please see *Section 1.2* of this guide.



The screenshot shows the 'ADD USER' interface. At the top left is the Realex Payments logo. A search bar contains 'Quick Search: Choose Criteria' and 'Enter Keyword'. A user profile 'John Smith' is visible in the top right. The sidebar menu includes 'MENU' (Dashboard, Transactions, Customers, Terminal, Fraud Management, Settled, Reports) and 'QUICK LINKS' (Pending, Delayed, Voided, Failed). The 'ADMINISTRATION' section has 'Client Settings' and 'User Management' (selected). The main content area is titled 'ADD USER' and features a back arrow. It includes a checkbox for 'Automatic Password Reset' (labeled '2'). The 'USER DETAILS' section (labeled '3') contains input fields for Username, Email *, First Name, and Surname. The 'ROLES *' section (labeled '4') lists six roles with checkboxes: Administrator, Sales Agent, Fraud Manager, Power User, User Manager, and Read Only. At the bottom right are 'CANCEL' and 'SAVE & SEND EMAIL' buttons. The footer shows '© Realex Payments 2015 v2.1.93'.

1.2 USER ROLES AND PERMISSIONS

Users of RealControl can be assigned multiple roles which define the areas and functionality to which they have access. The following roles can be assigned:

- Administrator
- Power User
- Sales Agent
- Read Only
- Fraud Manager
- User Manager

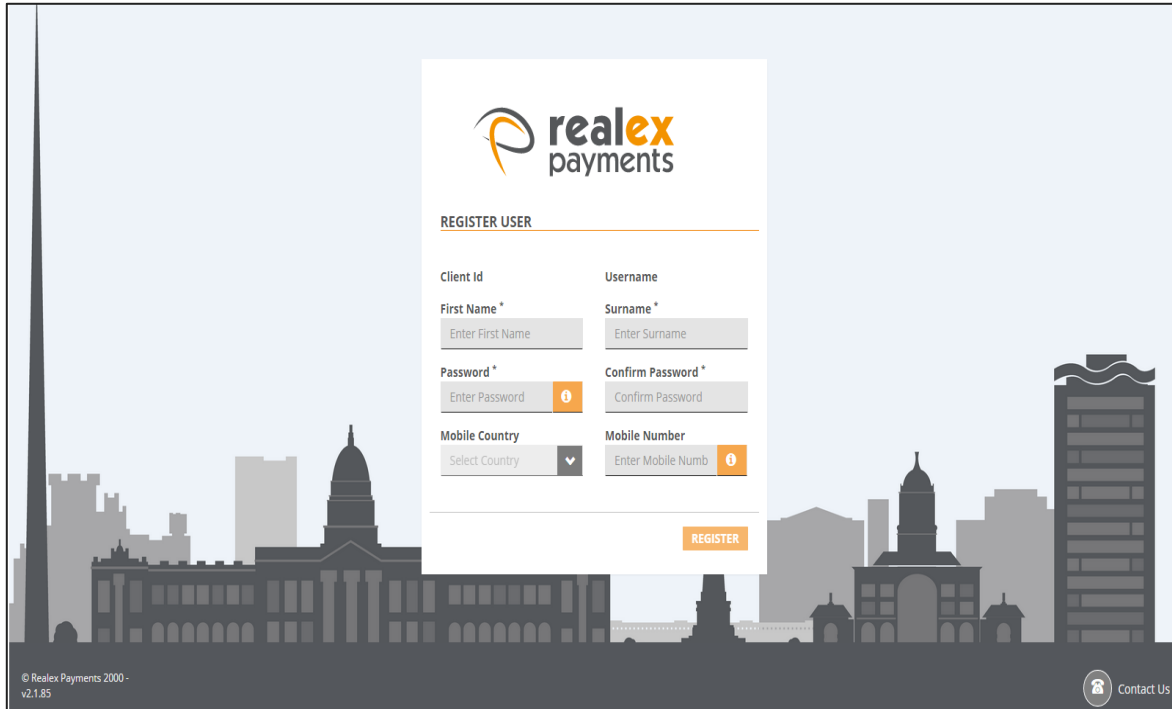
The table below details the functionality within each user role:

Action	Administrator	Power User	Sales Agent	Read Only	Fraud Manager	User Manager
Ability to view transaction details	✓	✓	✗	✓	✗	✗
Ability to generate, view and download reports	✓	✓	✗	✓	✗	✗
Ability to process sales	✓	✓	✓	✗	✗	✗
Ability to perform refunds	✓	✓	✗	✗	✗	✗
Ability to perform rebate /void/settle transactions	✓	✓	✗	✗	✗	✗
View the settings general section	✓	✗	✗	✗	✗	✗
Change your existing password	✓	✓	✓	✓	✓	✓
Add new RealControl users	✓	✗	✗	✗	✗	✓
Change the roles of other Users	✓	✗	✗	✗	✗	✓
Request an Automated Password Reset for other Users	✓	✗	✗	✗	✗	✓
View the Fraud Management section – View/Edit Rules	✓	✗	✗	✗	✓	✗

Note: All Users must be assigned at least one role.

2 USER REGISTRATION PROCESS

Once a user is created a registration email will be sent to the user's email address. Users will receive an email from register@realexpayments.com. Simply click on the registration link in this email to access the registration page below:

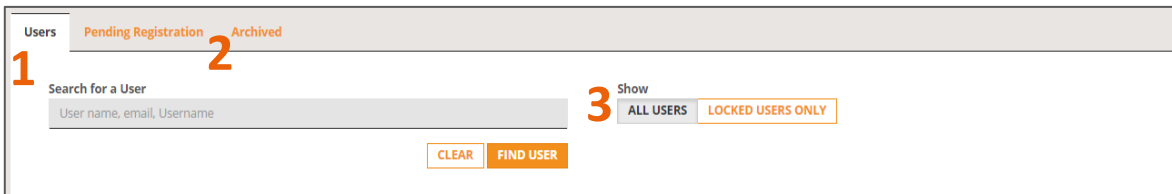


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2.1 VIEWING AND EDITING EXISTING USERS

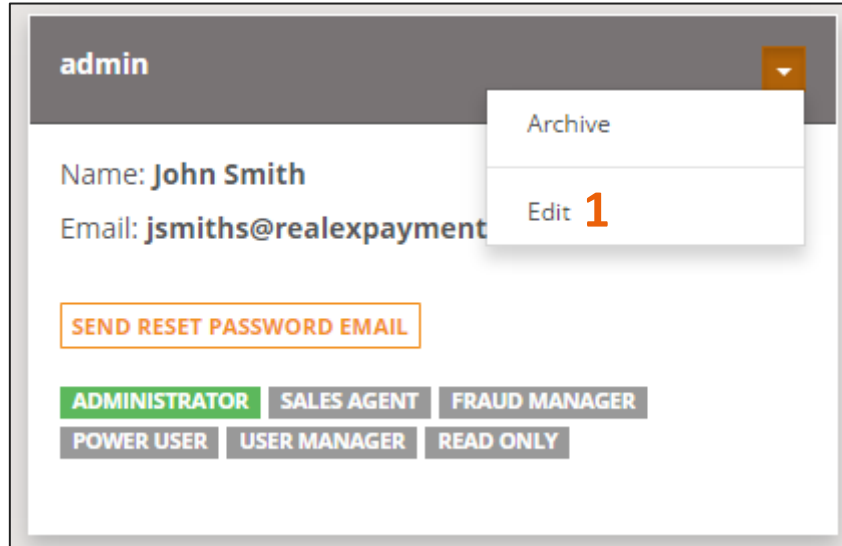
In the **'User Management'** screen you have the ability to search for users that you wish to View/Edit by entering their username/name in the **'Search for a User'** field.

1. The **'Users'** tab will show all registered users in the application.
2. The **'Pending Registration'** tab will show users who have yet to register on the application and the **'Archived'** tab will show users which have had their user access revoked. Archived users can be re-activated on the application if needed.
3. You will also have the option to view **'All Users'** or to view **'Locked Users Only'**.

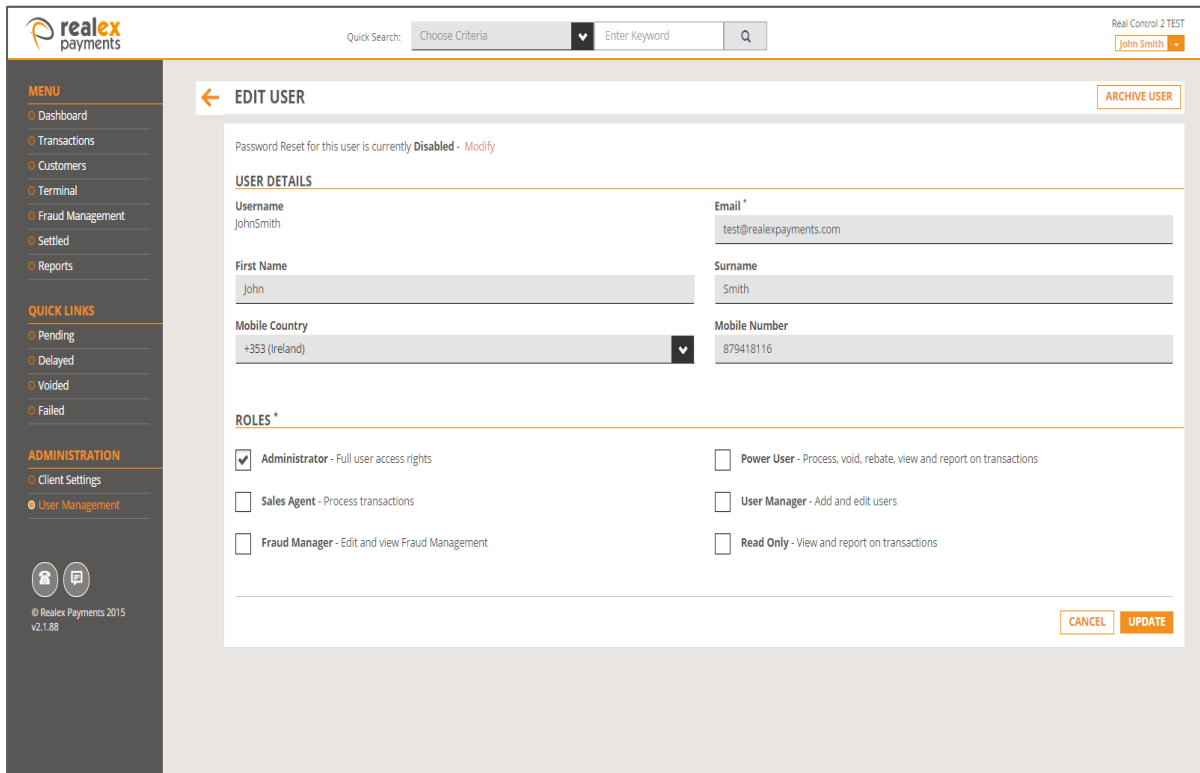


If you wish to **'Edit'** a user you can do so by clicking on the dropdown box located on the users details.

1. Click on the **'Edit'** option as shown below.



Once you have clicked **'Edit'**, the below screen will appear:



If the user has been set up for automated password resets you will have the option to **'Send Password Reset Email'**. This option allows you to send an email to the Users registered email address containing a link to reset their password.



GOT ANY QUESTIONS?
LET US KNOW.

SUPPORT

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