

ConnectPay Admin User Guide

ConnectPay/Go2Pay Administrator User Guide

Logging into the ConnectPay portal

<https://go2pay.uk/App/frmLogin.aspx> (<https://go2pay.uk/App/frmLogin.aspx>)

Once your account is open you will receive your account details by email, which will include your:

Account Number

Username

Password

Users

In the Users area, you will be able to;

- Add new users
- Modify existing users
- Disable users

Users									
Enabled		YES		User Name		0			
Account	User Name	First Name	Surname	Email Address	Account Number	Management Group	Enabled	Search	
[NO RECORDS]									
EXCEL / CSV									
								Add New	Close

You will be able to view all current users here. You can use the search options at the top of the page to find a specific user or set of users.

Click on the user to make any changes to their set up or privileges, or to disable their access.

Add New User

To set up a new user, click “Add New”.

You will need to complete the below fields.

- **Account** – this will be pre-populated with your account number
- **Username** – this is the username they will use to log in
- **Password** – this needs to be at least 8 characters long, alpha-numeric and contain at least one special character
- **Management Group**
 - This will be pre-populated with 'accountnumber'_GRP001' which will enable the user to see all transactions processed through this account.
 - If you wish to restrict their view to only their own transactions, please change the management group to 'viewowntrx_'accountnumber'.
 - If you wish to set up different management groups, please contact us.
- **Account Number** – you can use your main account number or, if you want to be able to report on individual employees or departments, you can create individual or group account numbers. This would also limit visibility between employees and/or departments. We recommend using a standard format for these.
- **First Name**
- **Surname**
- **Email Address**
- **Threshold** – this refers to the maximum amount you would like the user to be able to take payment for through the Virtual Terminal or ConnectPay App.
- **Secure Threshold** – this refers to the maximum amount you would like the user to be able to take payment for through Link payments or the Go2Pay App.
- **Failed Log-ins** – this shows the number of failed log in attempts. Once the number is 3 or above the user will be blocked from logging into the portal or from using the app, and this will need to be reset to 0.
- **Permissions** – here you will be able to edit each user's security and access permissions.
 - **Enabled** – this must be ticked in order for the user to be able to access the ConnectPay portal and use either of the app. Untick this to disable a user's account.
 - **No Admin** – when ticked, the user will be able to take payments through the app but will not provide access to the portal to view transaction information.
 - **Payments** – this must be ticked in order for the user to be able to process payments either through the portal or the app.
 - **Web Payments** – this must be ticked in order for the user to be able to process payments through the portal. If unticked, the user will still be able to take payments through the app and will be able to log into the portal to view transactions.
 - **Refunds** – when ticked, the user will be able to process refunds.
 - **Edit Management Groups** – when ticked the user will be able to add and change management groups.
 - **Edit Merchant** – when ticked the user will have access to the Merchant screen and be able to amend templates.
 - **Edit User** – when ticked the user will be able to access the User screen and add or amend users.

The image shows a 'User' management form with the following fields and values:

- Account: 748
- Username: (empty)
- Password: (empty)
- Confirm Password: (empty)
- Management Group: 748_GRP001
- Account Number: (empty)
- First Name: (empty)
- Surname: (empty)
- Email Address: (empty)
- Location: (empty)
- Telephone: (empty)
- Standard Surcharge: 0
- Threshold: 0.00
- Secure Threshold: 0.00
- Last Login: (empty)
- Failed Logins: 0
- Enabled: ☒
- No Admin: ☐
- Payments: ☐
- Web Payments: ☐
- Refunds: ☐
- Permissions: ☐ Edit Management Groups, ☐ Edit Merchant, ☐ Edit Users

Buttons: Save, Close

Security

In the Security area, you will be able to;

- Change your password
- Enable two-factor authentication
 - Switching this on enables another layer of authentication for your ConnectPay/Recurring Payments account. This will require you to download Google Authenticator to your phone which, when paired with our system, will require you to enter an access code at login. To set this up please contact support@adelante.co.uk.

Merchant

In the Merchant area, you will be able to;

- Customise email templates
- Customise receipts
- Set up management groups

Merchant

Transactions

Account

748

Name

Adelante Software Ltd

Card Logos

☐ Amex

☒ MasterCard

☒ Visa

SMS Message

Thank you for your custom; please Go2Pay: ##LINK## Terms and conditions apply

Email Message

Your Order {OrderReference}

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X

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Email Receipt

Your Payment Receipt

B

I

U

+

-

→

←

T

X

≡

H

##LOGO##

Merchant

{CompanyName}

Contact Name

{FullName}

Contact Number

{Telephone}

Contact Email

{EmailAddress}

Send Email Receipt

☒

Copy Receipt To User

☐

Email Reminder

Your Order {OrderReference}

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←

T

X

≡

H

Thank you for your custom - to {= {Attempts} == 0 ? "complete" : "retry" =} payment please Go2Pay: ##LINK##

Contact Us

Contact us

From Email Address

accounts@adelante.co.uk

From SMS

Users

M/ Groups

Save

Close

Card Logos

Here you can select which card type logos are displayed on the page once customers click the link.

Send Email Receipt

Here you can select whether to send an automatic email receipt to the customer if they provide an email address during the payment process.

Copy Receipt to User

Here you can select whether to send a copy of the receipt to the system user processing the payment.

Management Groups

if you think that this might be of use to you please contact us for further information.

All templates are customisable. Do not remove or change the format “##x##” as this is required for the links to work (e.g. ##LINK##).

Reconciliation

In the Reconciliation area, you will be able to;

- View a summary of the number of transactions and refunds,
- View the total amount of transactions and refunds for a particular day or period
- Produce a CSV spreadsheet of the transactions for the period you have specified by selecting “EXCEL/CSV”
- View the transactions by selecting “List”



The screenshot shows a 'Transaction Reconciliation' form with the following fields and values:

Transaction Reconciliation	
Account	DEMO66
Period	YESTERDAY
Authorisations	8
Authorisations Total	1,136.95
Refunds	1
Refunds Total	10.00

At the bottom of the form, there are three buttons: 'EXCEL / CSV', 'List', and 'Close'.

Sent Items

In the Sent Items area, you will be able to;

- View all emails sent out from your account, including any link payments sent by email
- View any link payment sent by SMS by “SMS”

Emails					
Post Date	▼ today	Account	▼ demo		Search
Account	Post Date	To	Subject	Status	
DEMO99	15/05/2019 10:19	example@example.com	Your Payment Receipt	Sent	
[1-1 / 1]					
SMS					
Close					

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