User Access Items

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Below is a list of all possible options that can be enabled or disabled for a user. As an administrator, you will only be able to enable access to items that your user login also has access to. Enabled options will display in *green*, while items that are disabled for the user are in *white*.

Dashboards	Description
Transaction Volumes	Will enable or disable the financial graphs that load on the Qualpay Manager's dashboard.

Designation	Description
Account Administration Designation	Will add (or remove) the user as a designated Account Administrator contact for your merchant account. Users with this designation can contact Qualpay Support and receive any information about the account as well as request changes be made to the account. They will also receive notification emails from Qualpay about the account or products used to process transactions. *Note: This designation should only be turned on for users who are allowed to make changes on behalf of your company.*
Dispute Designation	Will add (or remove) the user as a designated Dispute contact for your merchant account. Users with this designation can contact Qualpay Support and receive information about disputes on your account. They will also receive dispute notification emails for new disputes on your account. The user's email will display on the Notifications page for the Dispute Summary option.
Account Support Designation	Will add (or remove) the user as a designated Account Support contact for your merchant account. Users with this designation can contact Qualpay Support and receive information about the account but cannot request changes.
IRS-1099 K Designation	Will add (or remove) the user as a designated IRS 1099-K contact for your merchant account. Users with this designation can contact Qualpay Support and receive information about IRS 1099-K forms and filings for your account. They will also receive IRS 1099-K notification emails for your account.

Administration	Description

Administration	Description
User Administration	Access will allow the user to view, edit, create, or disable users on your account, including the current user administrator.
1099-K Setup	Access will allow the user to modify the delivery method as well as the mailing address for annual IRS 1099-K forms.
Dispute Management Setup	Access will allow the user to configure a 3rd party dispute vendor and how disputes are handled.
Payment Gateway Administration	From **Administration**, allows the user access to update critical settings for the Qualpay Payment Gateway product. Only available on accounts that use Qualpay Payment Gateway for processing transactions.
Merchant Details	Access will allow the user to view information about the merchant account, such as Merchant ID, DBA, and Legal Names, Accepted Currencies, and all Addresses on file with Qualpay.
Webhook Administration	Access will allow the user to create, enable, disable, and validate webhooks for the merchant account.

Dispute History Report	Description
Dispute History Report	Enables the **Disputes** menu option and, from **Reports**, the Dispute History report. View all dispute activity.
Dispute Respond	Access will allow the user to Accept or Respond to retrievals and first-time disputes. Allows the user to upload documentation in response to a dispute.
Dispute Challenge	Access will allow the user to Accept or Challenge pre-arbitration and second-time disputes. Allows the user to upload documentation in response to a dispute.

Other Reports	Description
Pending Transactions	From **Reports**, view and manage transactions pending settlement.
Settled Batch Report	From **Reports**, view batch history and settled transaction lookup.
Deposit History	From **Reports**, view deposits, fee activity, and adjustments.
Reconciliation	From **Reports**, reconciliation data that views the sum of deposits and debits into your deposit account and maps the information back to batches, adjustments, and reserve payments.

Other Reports	Description
1099-K	From **Reports**, view the IRS 1099-K report for current and previous years.
Statements	Enables the **Statements** menu option and provides access to all statements.
Reserve Activity Report	From **Reports**, view reserve activity.
Card ID Report	From **Reports**, view card ID. Access is only available on accounts using a Qualpay product for processing.
Email History Report	From **Reports**, view email history. Access is only available on accounts using a Qualpay product for processing.
Transaction Report	Enables the **Transactions** menu option and provides access to all transactions processed along with their status.
Adjustment History Report	From Reports, view bank adjustment history.

Follow-On Transactions	Description
Void Transaction	Access will allow the user to perform voids on transactions that have been processed on a Qualpay product.
Refund Transaction	Access will allow the user to perform refunds on transactions that have been processed on a Qualpay product.
Capture Transaction	Access will allow the user to capture authorizations on transactions that have been authorized on a Qualpay product.

Account Updater Reporting	Description
Account Updater Reporting	From **Reports** view items that have been run through Account Updater and their status. Only available on accounts that use Account Updater through Qualpay.
Account Updater Administration	From **Administration**, allows a user to enroll the account in* in Account Updater as well as access the Account Updater configuration settings. *Enrolling in Account Updater requires confirmation of additional fees being assessed*.

Virtual Terminal	Description
Virtual Terminal	Enables the **New Transaction** menu option. Only available on accounts that use Qualpay Virtual Terminal for processing transactions.
Authorize Only	Enables the user to access the authorization transaction type.

Virtual Terminal	Description
Credit	Enables the user to access the credit transaction type.
Force	Enables the user to access the force transaction type.
Sale	Enables the user to access the sale transaction type.
Verify	Enables the user to access to verify a card is valid.
Virtual Terminal Administration	From **Administration**, allows user access to update critical settings for the Qualpay Virtual Terminal product.

Recurring Billing	Description
Recurring Billing	Enables the **Plans** and **Subscriptions** menu options and provides access to view plans and subscriptions that are set up on the account. Only available on accounts that use Qualpay Recurring Billing for processing transactions.
Create Plans	Access will allow the user to create new plans.
Create Subscriptions	Access will allow the user to create new subscriptions.
Delete or Archive Plans	Access will allow the user to delete or archive existing plans.
Edit Plans	Access will allow the user to edit existing plans.
Update Subscription Status	Access will allow the user to update subscription statuses.
Recurring Billing Administration	From **Administration**, allows the user access to update settings for the Qualpay Recurring Billing product.

Qualpay Checkout Administration	Description
Qualpay Checkout Administration	From **Administration**, allows the user access to update critical settings for the Qualpay Checkout product. Only available on accounts that use Qualpay Checkout for processing transactions.

Quickbooks Sync	Description
Quickbooks Sync	From **Reports**, allows a user to choose which Quickbooks version to sync to. Can set date ranges for Adjustments or Transactions to be synced into Quickbooks. Only available on accounts that have the Quickbooks Sync product from Qualpay.
Quickbooks Sync Administration	From **Reports**, allows a user to update and set up the connection to their Quickbooks Online account. Only available on accounts that have the Quickbooks Sync product from Qualpay.

ADDs SmartConnect	Description
ADDs SmartConnect	Enables the **SmartConnect** menu option and provides access to. Only available on specific Energy accounts that use ADD Systems Software.
ADDs SmartConnect Settings	From **Administration**, allows the user access to update the ADDs Company ID, User Name, and Base URL for connection to SmartConnect.

Customer Vault	Description
Customer Vault	Enables the **Customers** menu option and provides access to view customer records that are set up on the account. Only available on accounts that use the Qualpay Customer Vault product.
Create Customer	Access will allow the user to create new customers.
Update Customer	Access will allow the user to update existing customers.
Delete Customer	Access will allow the user to delete existing customers.

Invoicing	Description
Invoicing	Enables the **Invoices** menu option and provides access to view invoices that have been created on the account. Only available on accounts that use the Qualpay Invoicing product.
Create Invoice	Access will allow the user to create new invoices.
Cancel Invoice	Access will allow the user to cancel existing invoices.
Update Invoice	Access will allow the user to update existing invoices.
Invoice Administration	From **Administration**, allows the user access to update critical settings for the Qualpay Invoicing product. Only available on accounts that use Qualpay Invoicing for processing transactions.