SurePay Portal manual

user & permissions management

Version 1

surepay

Document outline

1 About this document

Version history

This document describes how to use the

Version	Date	Author	Change summary
1	8-8-2024	M. Heere	Initial version

2 Introduction

This document describes how to manage users with SurePay's permissions management feature. Each organisation in the SUrePay Portal should have at least one user with the "Portal admin" role.

Organisation

At least one Portal Admin

Other users
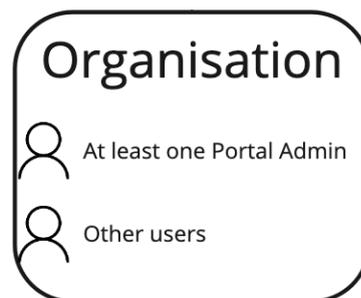
Portal admin role
This user will be able access all the functionalities in the portal, including the user management function. In total there are 4 roles, in the table below can be found which functions of the portal are enabled per role.

	Feature	Permissions management within an organisation portal account			
#	Function / Role	Single check role	File check role	Dashboard role	Portal Admin role
1	Can do single checks	Yes	No	No	Yes
2	Can do file checks	No	Yes	No	Yes
3	Access organisation setting page	No	No	No	Yes
4	Edit organisation settings	No	No	No	Yes
5	Manage users in organisation	No	No	No	Yes
6	View # of checks done by company in dashboard	No	No	Yes	Yes

3 User management

3.1 View users & search for a user

Step 1: Log in to the SurePay portal as an administrator

Step 2: Click on your Profile > Settings > Users
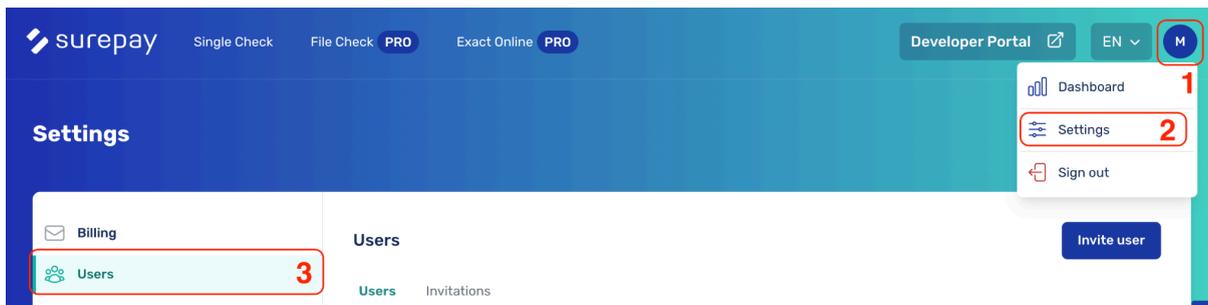
Note: If you do not see the "users" button in your settings page, you do not have the admin role. Contact an administrator of your organisation to assign you the role.

Step 2: Click on "search" and enter a name or email address of a user
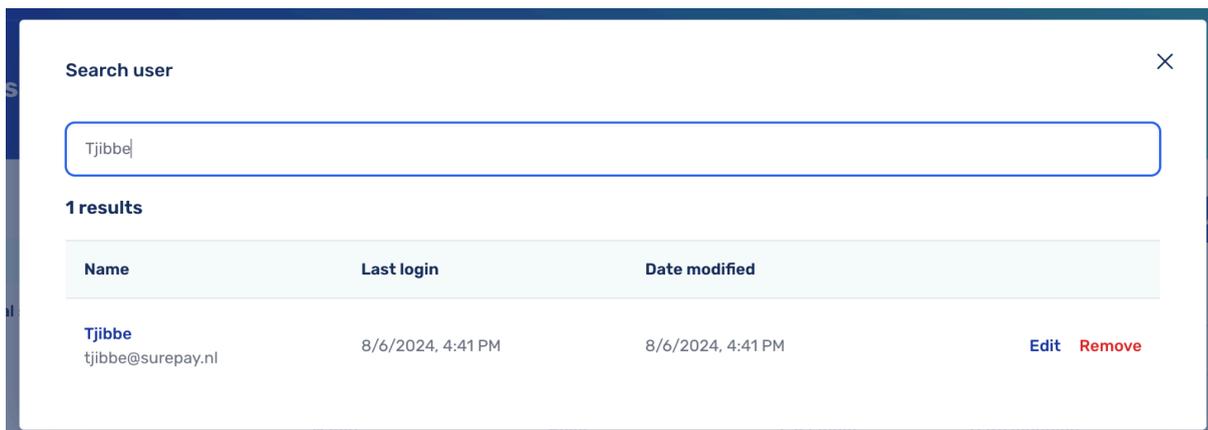
3.2 Change name or roles of a user

Step 1: Go through the steps from 3.1 to find a user

Step 2: Click on "Edit" or the name of the user

| Tjibbe
tjibbe@surepay.nl | 8/6/2024, 4:41 PM | 8/6/2024, 4:41 PM | Edit Remove |

Step 3: Change the Name or remove/add roles from the user.

For details about the different roles, please refer to the introduction of this document.

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Edit user

Name
Tjibbe

E-mail address
tjibbe@surepay.nl

Roles

- ☑ Single check
- ☑ File check
- ☑ Admin
- ☐ Dashboard

Save changes

Step 4: Click "Save changes"

Save changes   ✓ Changes have been saved

You will see this message, you can now go back to another task.

3.3 Delete a user

Step 1: Go through the steps from 3.1 to find a user

Step 2: Click on "Remove"

Tjibbe tjibbe@surepay.nl	8/6/2024, 4:41 PM	8/6/2024, 4:41 PM	Edit (Remove)

Step 3: Click "Yes, remove user"

Are you absolutely sure?

This will remove martin+test6aug@surepay.nl from your organisation. Be aware that if it's their only organisation, the account martin+test6aug@surepay.nl will be deleted.

Cancel   **Yes, remove user**

If you see below message in the top of your screen, the user is successfully removed.

oliver@surepay.nl

✓   martin+test31@surepay.nl has been removed
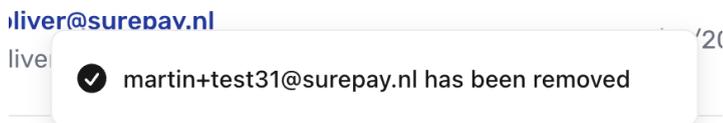
3.4 Reset Multi Factor Authentication (MFA) of a user

Step 1: Go through the steps from 3.1 to find a user

Step 2: Click on "Edit" or the name of the user

| Tjibbe | 8/6/2024, 4:41 PM | 8/6/2024, 4:41 PM | Edit Remove |
| tjibbe@surepay.nl | | | |

Step 3: Press "Reset MFA"

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Edit user

Reset MFA

Name

Tjibbe

E-mail address

tjibbe@surepay.nl

Roles

☐ Single check

☐ File check

☑ Admin

☐ Dashboard

Save changes

Step 4: Press "Yes, reset MFA"

Are you absolutely sure?

This will reset all multi-factor authentication for this user

Cancel   Yes, reset MFA

The next time this user logs in, they will have to reconfigure a Multi Factor Authentication device.

3.5 Create a new user

Step 1: Log in to the SurePay portal as an administrator

Step 2: Click on your Profile > Settings > Users

Step 3: Click on "Invite user"

Users   Invite user

Users   Invitations

Q Search

Name	Roles	Last login	Date modified		
Martn martin@surepay.nl	admin	8/9/2024, 9:29 AM	8/9/2024, 9:29 AM	Edit	Remove

Step 4: Fill in the name, e-mail address and select the roles for the user. Then press "create user".

The user will then receive an invitation to the portal in their e-mail.

For more information on the roles, please refer to the introduction of this document.

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Add user

Invite another user to your organisation

Name
Firstname Lastname

E-mail address
email@address.co.uk

Roles

☑ Single check

☑ File check

☐ Admin

☑ Dashboard

Create user

3.6 View invited users

Step 1: Log in to the SurePay portal as an administrator

Step 2: Click on your Profile > Settings > Users > invitations

Here you can see which users are invited to join the portal. Once they accept the invitation, they will appear in the "users" section. If they have not accepted the invitation yet, they will appear here in the "invitations" screen.
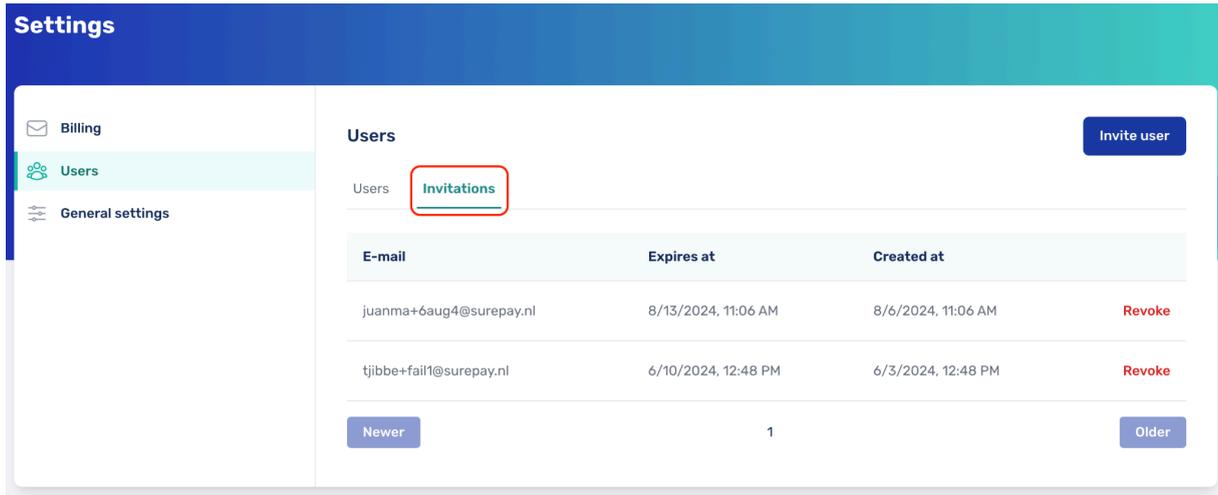
3.7 Revoke invitation of invited user

Step 1: Log in to the SurePay portal as an administrator

Step 2: Click on your Profile > Settings > Users > invitations

Step 3: Click on "Revoke"

Users

Invite user

Users   **Invitations**

E-mail	Expires at	Created at	
test@user.nl	8/16/2024, 9:58 AM	8/9/2024, 9:58 AM	Revoke
juanma+6aug4@surepay.nl	8/13/2024, 11:06 AM	8/6/2024, 11:06 AM	Revoke
tjibbe+fail1@surepay.nl	6/10/2024, 12:48 PM	6/3/2024, 12:48 PM	Revoke

Newer   1   Older

Step 4: Click on "Yes, revoke invitation"

Are you absolutely sure?

This will revoke the invitation of test@user.nl

Cancel   Yes, revoke invitation
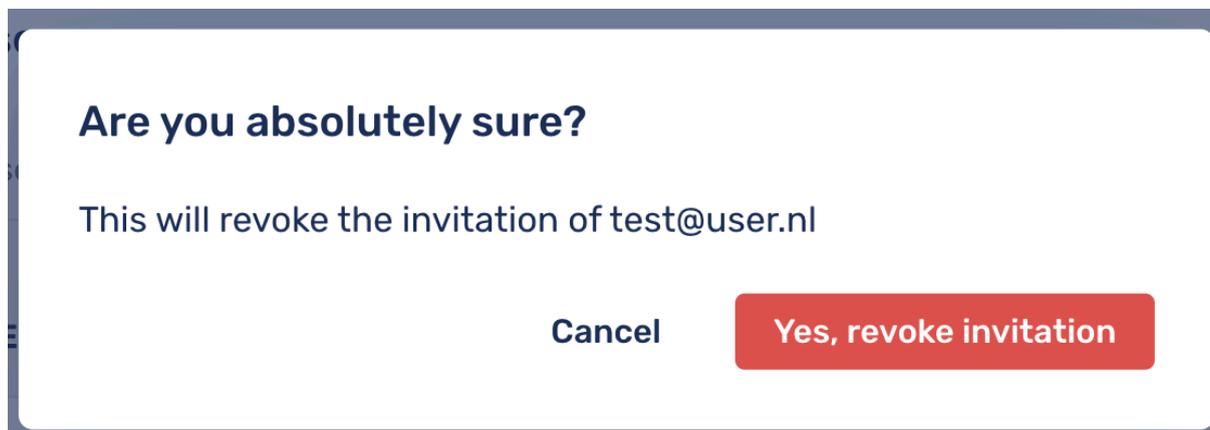
The user will still have received the invitation email, but the invitation link in the email won't work anymore.