

Group Manager

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1. Introduction

A Merchant Group is the grouping of different accounts (PSPIDs) under a single Group ID without the accounts losing their operational independence. It can be compared to gathering different folders together in a new super-folder.

The accounts that are grouped together do not have to be of the same type; you can put different solutions such as e-Commerce and Batch accounts together in a Group.

1.1 Benefits

When you have several different accounts, it might be useful to group them together for commercial, administrative or technical reasons. We have listed the advantages of creating a group account below:

1. Billing

- **Invoicing:** When you group your accounts, you can either be billed on the Group account (one bill with details for each sub-account) or receive a separate bill for each sub-account.
- **Pricing:** All your transactions can also be totaled resulting in a higher transaction volume and consequently a lower price per transaction to pay. Please contact our customer care Merchanthelp Tel. +41 (0)848 38 24 23 Email: merchanthelp@postfinance.ch for further details.

2. Account usage

- **Group login:** When you have several different accounts which have been grouped together, you can log in as the Group administrator to have an overview of all your accounts at once without having to log into each account separately.
- **Transaction overview:** You can obtain a full overview of all the transactions for your sub-accounts or view a specific sub-account to see only transactions for that PSPID.
- **Password distribution:** If the administrator of one of your accounts loses or forgets his password, the administrator of the Group account can send him a new password. The administrator of the Group account can also send passwords to any of the sub-account's users.
- **User Manager:** If you activate the User Manager option, you can set different user profiles for the users of the Group account. You can then, for example, create a Group account user that may only view the Group account and all its sub-accounts but is not permitted to make changes to the accounts.
- **Alias Manager:** If you activate the Alias Manager option of your Group account, you can generate an Alias database that can be accessed by, and is common to, all your sub-accounts. That way, all your Alias information is centralized and you don't need an Alias database for each sub-account. If you want to use the same aliases for all the PSPIDs in your Group, please contact our customer care Merchanthelp, to request configuration of this option.
- **Fraud Detection Module:** This module allows you to configure blacklists in one of your sub-accounts (PSPIDs) and make this blacklist configuration common to all your sub-accounts. If you want to use the same blacklists for all the PSPIDs in your Group, please contact our customer care Merchanthelp, and state the PSPID in which you have configured the blacklists and request configuration of this option.

3. Technical advantages

- For certain products, there's a technical advantage to using a Group account since you can perform certain operations once using the Group ID instead of performing them for each sub-account separately.

1.2 Creation

You cannot create a Group yourself. We create the Group for you and attach all the necessary PSPIDs. If you have a new PSPID you

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would like to add to your Group in the future, please contact our customer care Merchanthelp.

We also have an "Account creation" option that allows merchants who need to create many new accounts for their Group to create and attach the accounts themselves to the Group. Please contact our customer care Merchanthelp for more information on this option.

2. Group login

The sub-account login is not influenced by the creation of the Group account. The login process for Groups and their sub-accounts is identical to that for any other account with or without users.

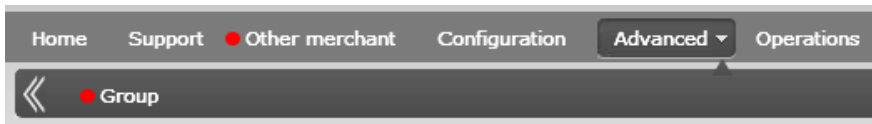
The Group administrator logs in with the Group ID and his password. If there are any users configured on the Group account, they will log in with their GroupUserID, the Group ID and their password, as shown in the image below.

The image shows a login form with the following elements:

- USERID:** A text input field containing the text "GroupUserID".
- PSPID: Optional**: A text input field containing the text "GroupID".
- Password:** A password input field with ten black dots representing the password.
- [Lost your password?](#): A link below the password field.
- SUBMIT**: A button at the bottom of the form.

3. Merchant Group menu

When you log into your Group account as administrator, you will notice that some of the menu items differ from those in a regular account menu.



3.1 Other merchant

If you want to view a specific sub-account, you can click "Other merchant", select the PSPID in the drop down box and click on "Be this PSPID". You will then enter the selected account as administrator.

The account menu will be replaced with the menu for the specific sub-account, still allowing you access to the extra menu items at Group level since you entered the account using your Group login.

To exit the sub-account and return to the Group account menu, click on "Other merchant" and then "Deselect PSPID".

3.2 Advanced: Group

To display all the PSPIDs that are grouped together in your Group account, click on the "Group" link in the "Advanced" menu. Only our customer care Merchanthelp is able to edit the Merchant Group and delete sub-accounts.

3.3 Operations

All the operations you perform and all the transaction overviews will be at Group level unless you have selected one of your sub-accounts via the "Other Merchant" link.

4. Impact of the group structure on products

4.1 e-Terminal

If one or more sub-accounts of the Group account are e-Terminal accounts, Group users can log into the Group account and perform a new transaction choosing the beneficiary from a drop down list in the “New Transaction” window; in this way, it is not necessary to log into the specific e-Terminal account in which they want to register the transaction. If you select a specific account, you will not see the drop down list.

4.2 e-Commerce

The Group structure has no impact on the e-Commerce integration.

4.3 DirectLink

The requests for DirectLink can be made with a Group UserID (API user) and its password for all your sub-accounts, instead of having to send requests for each sub-account using a different password per account.

Field	Description
USERID	A Group UserID (API user).
REFID	GroupID of your Group account.
REFKIND	MGID (“MGID” is short for Merchant Group ID, this is the fixed value for the REFKIND field).
PSWD	Password of the Group user you specified in “USERID”.
PSPID	PSPID of the sub-account in which you want to register the transaction.

4.4 Batch

Instead of sending a payment file for each sub-account, you can send one file containing transactions for different sub-accounts in your Group. You can send the file as a Group User and enter the specific sub-account PSPID of the transaction in each transaction line in the file.

Login Header layout: OHL;PSPID;PSWD;USERTYPE;USERID;

Data to be included in the file header:

Field	Description
PSPID	PSPID of one of your sub-accounts (this is only required because you are not allowed to send in transactions using your GroupID). It is best to use the PSPID of the sub-account that arises most frequently among the transactions in the file.
PSWD	Password of the Group user you specified in “USERID”.
USERTYPE	MGID (“MGID” is short for Merchant Group ID, this is the fixed value for the USERTYPE field).
USERID	A Group UserID.

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The PSPID at line level should be entered in field number 14 (transaction level record). Although this field can technically be left empty if the PSPID is identical to the PSPID of the sub-account in the header, we nevertheless recommend you enter the PSPID in field number 14 for each transaction line.