



# **Dashboard management**

## **Back Office user manual**

Document version 1.2

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## 1. HISTORY OF THE DOCUMENT

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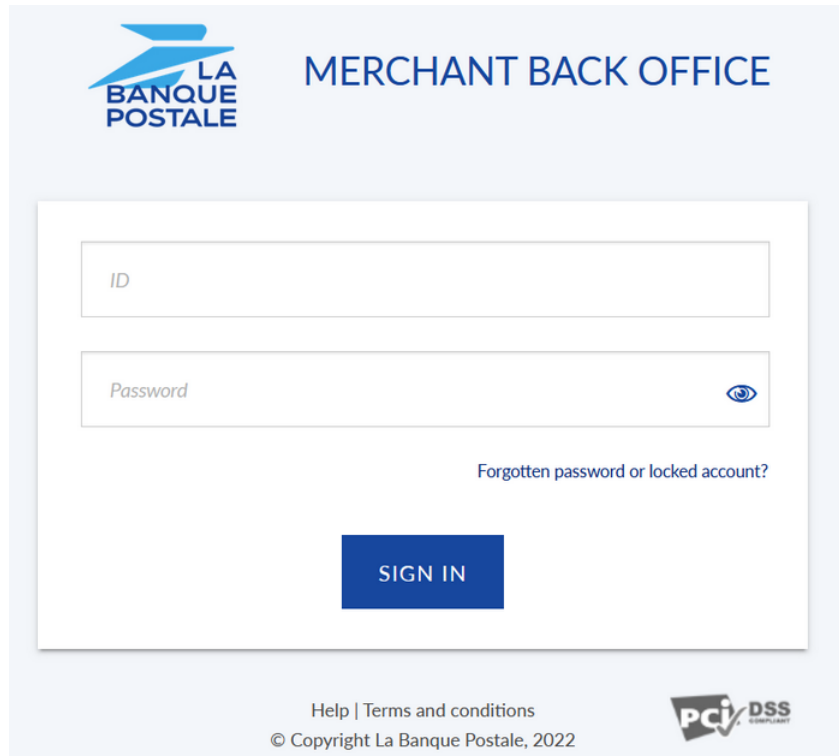
Version	Author	Date	Comment
1.2	La Banque Postale	8/30/2019	Initial version

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## 2. SIGNING IN TO MERCHANT BACK OFFICE

Sign in to the Back Office:

<https://scelliuspaiement.labanquepostale.fr/vads-merchant/>



The screenshot shows the login interface for the Merchant Back Office. At the top left is the La Banque Postale logo. To its right, the text 'MERCHANT BACK OFFICE' is displayed. Below the logo and title is a white login form with two input fields: 'ID' and 'Password'. The 'Password' field includes a toggle icon for visibility. Below the password field is a link that reads 'Forgotten password or locked account?'. A blue 'SIGN IN' button is centered below the form. At the bottom of the page, there is a footer with the text 'Help | Terms and conditions' and '© Copyright La Banque Postale, 2022', along with a PCI DSS logo.

**1. Enter your login.**

The login is sent to the merchant's e-mail address (the subject of the e-mail is **Connection identifiers- [your shop name]**).

**2. Enter your password.**

The password is sent to the merchant's e-mail address (the subject of the e-mail is **Connection identifiers- [your shop name]**).

**3. Click Sign in.**

After 3 password entry errors, the user's account is locked. Click on the link **Forgotten password or locked account** to reset it.

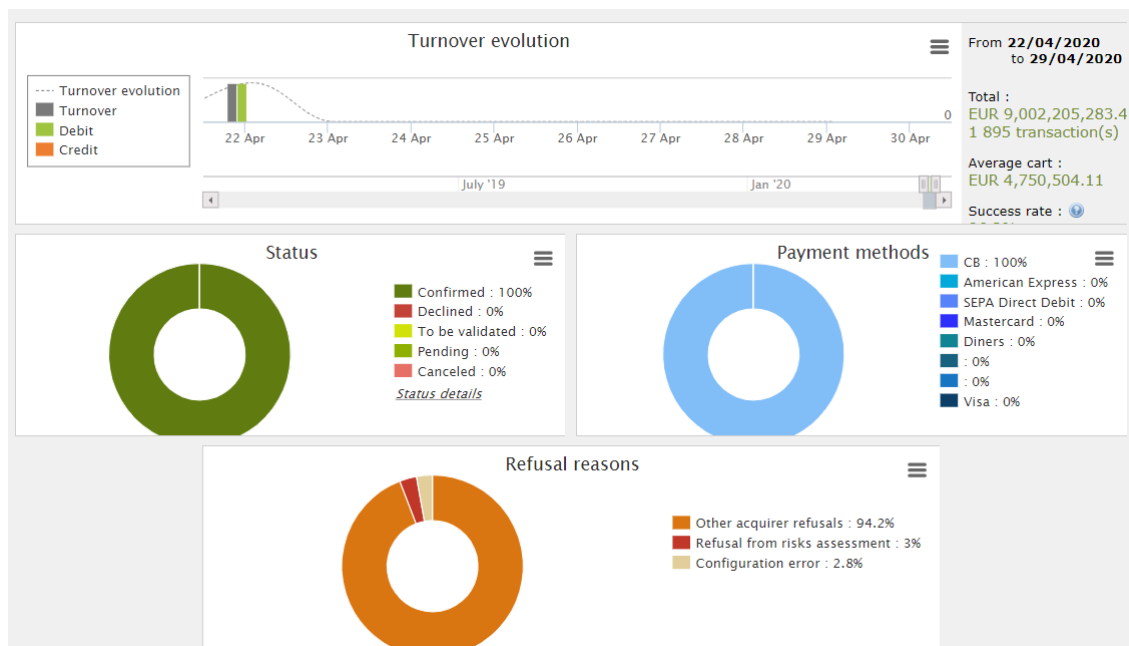
### 3. VIEWING THE DASHBOARD

#### **Note**

Access to the **Dashboard** requires to be configured. If the **Dashboard** menu does not appear in your Merchant Back Office, please contact the E-Banking Merchant Support Service.

To display the dashboard, click **Management > Dashboard**

The graph page appears.



#### **Note**

The shops chosen in this dashboard example are in **mono currency** but these graphs also work in **multi currency** cases.

4 types of data are analyzed:

- **The evolution of the number of transactions and/or of the turnover.**

The graphs are presented as a histogram. The data is analyzed and compared over a specific period of time.

At any moment, the user can hover the cursor over a specific period of time to display a tooltip with the amounts and/or transactions analyzed in this period.

- **The different payment statuses.**

The graphs are presented as a circle. The data is analyzed and compared in real time over a specific period of time.

At any moment, the user can hover the cursor over a payment status to display a tooltip with the desired amounts and transactions.

The different analyzed statuses are:

- Canceled
- Failed
- To be validated
- Pending
- Confirmed
- Declined

- **The different payment methods used during the transactions.**

The graphs are presented as a circle. The data is analyzed and compared in real time over a specific period of time.

At any moment, the user can hover the cursor over a payment method to display a tooltip with the amounts and transactions performed using this payment method.

- **The different reasons for refusal.**

The graphs are presented as a circle. The data is analyzed and compared in real time over a specific period of time.

At any moment, the user can hover the cursor over a refusal motive to display a tooltip with the amounts and the number of transactions concerned by this refusal.

The different categories of the analyzed reasons for refusal are:

- 3D Secure abandonment
- Other acquirer refusals
- Invalid card
- Lost or stolen card
- Configuration error
- Suspected fraud
- Do not honor
- Limit exceeded / insufficient funds
- 3D Secure refusal
- Refusal from risk assessment
- Transaction not allowed

**Note**

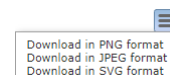
*At any moment, the user can apply filters to a graph by clicking on one or more elements in its caption.*



*Example: in this screenshot, the user does not want to analyze the transactions made with **Mastercard**. He or she clicks on the payment method to set it to zero (0) and exclude it from the analysis. All the user needs to do to reintegrate the payment method into the graph is click on the payment method once again.*

**Note**

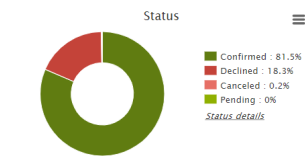
*The user can download each graph in PNG, JPEG or SVG format. To do this, the user needs to click the download icon and choose its format.*



## 4. VIEWING THE DETAILS OF THE TRANSACTION STATUSES

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You have the possibility, in the graph analyzing the statuses of the transactions, to visualize the detail of the statuses.



Click **Status details** to display the detail page.

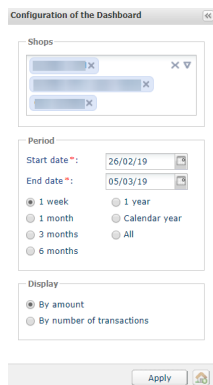
This page provides more information on the meaning of the analyzed statuses in the graph.

### Example

If graph the indicates **Canceled: 0.6%**, the cancellation can have two reasons:

- The capture date is reached but the merchant has not validated the transaction.
- The transaction has been canceled by the merchant.

## 5. CONFIGURING YOUR DASHBOARD DATA

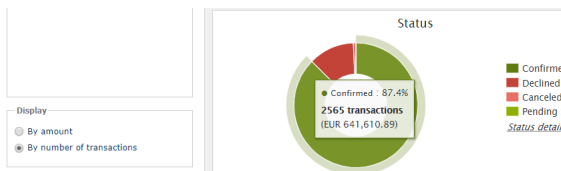


To deepen its analysis, the user can apply filters. Data can be displayed according to:

- the **Shops**
- the **Period**
- the **Display** mode (by amount or by number of transactions)

### 5.1. Defining the data to analyze in the dashboard

The user can display the graphs by prioritizing either the amount or the number of transactions.



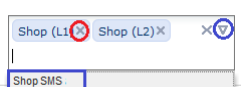
- Check the **By number of transactions** radio button and click **Apply** if you want to display the graphs by number of transactions.

The percentage and the number of transactions are put forward. The amount is displayed for information in parentheses.

- Check the **By amount** radio button and click **Apply** if you want to display the graphs by transactions amount.

The percentage and the amount are put forward. The number of transactions is displayed for information in parentheses.

### 5.2. Defining the shops to analyze



- To remove a shop, click on the cross (x) to the right of the shop name.
- To add a shop,
  - click the down arrow in the shops area.  
The list of shops appears.
  - Click on the shop to add.
- To validate your choice, click on the **Apply** button.

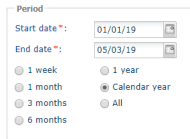


## 5.3. Defining the period to analyze

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The user has two options for selecting the period to be analyzed.

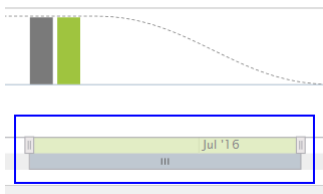
1. Select the period among the preset list.



The choice of the period is made in the configuration table.

1. Check the radio button for the period to be analyzed, *1 week, 1 month, 3 months, 1 year, calendar year*, etc. the **Start Date** and **End Date** fields update automatically.
2. Or, directly select the **Start Date** and **End Date** of the period to be analyzed.
3. To validate your choice, click on the **Apply** button.

2. Select the period from the graph



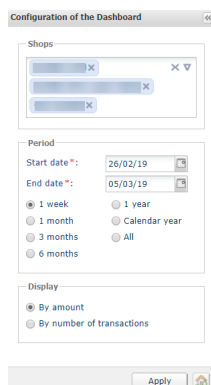
The choice of the period is made in the display area of the evolution of the dashboard.

1. Hold the cursor to the left or right,
2. Swipe right or left to choose the period.

The dashboard updates automatically as soon as the cursor is released.

## 5.4. Using the dashboard as homepage

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To use your dashboard as homepage of your Merchant Back Office

- Click on the symbolized icon as below.



A confirmation message appears.

- Click on **OK** to save your changes.

The icon changes appearance and is displayed as below.



*The change will be taken into account during the next connection.*

To stop using the dashboard as your homepage, simply click on the icon again, confirm and log back in.

## 6. OBTAINING HELP

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Looking for help? Check our FAQ on our website

<https://scelliuspaiement.labanquepostale.fr/doc/en-EN/faq/sitemap.html>

For any technical inquiries or if you need any help, contact [technical support](#).

In view of facilitating the processing of your requests, please specify your shop ID (an 8-digit number) in your query

This information is available in the “registration of your shop” e-mail or in the Merchant Back Office (**Settings > Shop > Configuration**).