



Quick Reference Guides



Table of Contents

1. Single

Multi

2.

1.1 Single Payment	3
1.2 Register	4
1.3 Schedule	5
2.1 Batch Payment	7
2.2 Batch Manager	8
2.3 Data Vault	10
2.4 Recurring Manager (Dash Board)	12

3. Internet

3.1 Themes	14
3.2 Pages	15

4. Admin

4.1 Transaction Search (Search and Refund)	<u> </u>
4.2 User Management	18
4.3 Uploads	20
4.4 Reports	21
4.5 Settlement Reports	22
4.6 Settings – Receipt Customisation	23
4.8 Notifications	24

5. Config

5.1 eForms	25
5.2 Fraud Control	28
5.3 Recurring Manager	29



1

3

Navigation

Click on 'SINGLE' then 'Single Payments'

HOME	SINGLE	MULTI	INTERNET	ADMIN	CONFIG	SUPPORT
Sing	le Paymer	nt				
Regi	ster					
Sche	dule					

Processing

How to process a one-off payment

- 1. Where applicable, select the child merchant and biller code from the drop downs.
- 2. Enter the CRN/s and/or Merchant Reference
- 3. Select the "Transaction Source"
- 4. Enter the amount
- 5. Enter the card details
- 6. Enter an email address to email a copy of the receipt
- 7. Click on "Submit Payment"

Screenshots

Single Pay	ments in	RealTime
------------	----------	----------

3

Single Payment 🔞	Register Schedule
Child Merchant:	
Biller Code:	
Customer Reference	1:*
Customer Reference	2:
Customer Reference	3:
	🛍 Find Customer 🔕 Reset Form
Merchant Reference:	
Transaction Source:*	Telephone
Amount \$:*	
Card Number:*	
Expiry Date (MM/YY):	*
CVN:	(<u>What is CVN?</u>)
Cardholder Name:	
Receipt Email Address	5:
	Submit Payment
* Mandanan	





Navigation

Click on 'SINGLE' followed by 'Register'

HOME	SINGLE	MULTI	INTERNET	ADMIN	CONFIG	SUPPORT
Single	Paymen	t				
Regist	ter					
Sched						

2

3

Storing Details

How to store a clients' details

- 1. Where applicable, select the child merchant and biller code from the drop downs.
- 2. Enter the CRN/s as required
- 3. Enter the card details and expiry
- 4. Enter an email address to email a copy of the receipt
- 5. Tick the Direct Debit advice box
- 6. Click on Register

Finding Details

How to find clients' stored details

- 1. Enter in CRN
- 2. Click Find Customer
- 3. All fields will be automatically be pre-populated with the stored details
- 4. Follow instructions to process payments as per "SINGLE"

Screenshots

4

Register payment methods

Single Payment Regis	ter 🛞 Schedule
Child Merchant:	
Biller Code:	
Customer Reference 1:*	
Customer Reference 2:	
Customer Reference 3:	
	🛍 Find Customer 🔯 Reset Form
Card Number: *	
Expiry Date (MM/YY):*	
Cardholder Name:	
Email Address:	
	Show Extra Fields
	I have identified the customer and advised that the conditions of the Direct Debit will be made available within 7 days
	Register

Single Payments in RealTime

* Mandatory

gister Schedule
Find Customer 🔯 Reset Form



Schedule

1

2

Navigation

Click on 'Single' followed by 'Schedule'

HOME	SINGLE	MULTI	INTERNET	ADMIN	CONFIG	SUPPORT
Sing	le Payme	nt				
Regi	ster					
Sche	dule					

NOTE: If customer details are not stored, you will first need to register them to store the details

How to Register a customer

1. Begin by entering the following customer details, as shown in **Figure 1**

Customer Reference: This is a name or a number generated by the merchant to identify their customer. **Card Number/Bank Account:** The credit card number or bank BSB & Account number of the customer. **Name of the customer and email address**

Before submitting, you will need to check the box to acknowledge that you have identified the customer and that the customer is aware that they will be receiving the conditions associated with the payment within 7 days.

2. Once complete, click on 'Register'

egister payment method	Figure '
Single Payment Regis	ster 😧 Schedule
Child Merchant:	X
Biller Code:	v
Customer Reference 1:*	456741
Customer Reference 2:	
Customer Reference 3:	
	Find Customer Reset Form
	⊙ Credit Card ○ Bank Account
Card Number: *	5123456789012346
Expiry Date (MM/YY):*	99 / 00
Cardholder Name:	Mr David Graham
Email Address:	dgraham@hottmail.com
* Mandatory	 I have identified the customer and advised that the conditions of the Direct Debit will be made available within 7 days Register
chedule payments Single Payment	Register Schedule (s)
Biller Code:	▼
Customer Reference	e 1:* 123456
Customer Reference	e 2:
Customer Reference	ee 3:
	🛍 Find Customer 🔞 Reset Form

rooph





Scheduling a Payment

- 1. Enter the customer reference number and then click on '**Find Customer**' to load up the customer's details in **Figure 2**.
- 2. Enter the details for the transaction including description, recurring amount, frequency and start date.
- 3. Once complete, click on 'Schedule Payment'.

Cancelling and Suspending a scheduled payment

How to suspend a scheduled payment

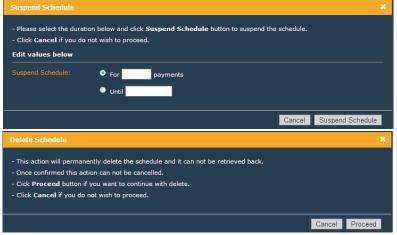
- 1. Click on the suspend button (A) under the actions tab.
- 2. Enter the amount of payments to be suspended forward, or enter the date for which the payments is to be suspended until.
- 3. Once complete, click on 'Suspend Schedule'.

How to cancel a scheduled payment

- 1. Click on the cancel button (B) under the actions tab as denoted by.
- 2. Confirm that you would like to cancel the payment by clicking on the '**Proceed**' button.

Add new schedule p	payment				
Description:					
Recurring Amount: *					
Frequency:*	Weekly	 Image: A set of the set of the			
Start Date:*					
End:*	No end date				
	O End after	payments			
	O End on				
	I have identified	the customer and advised that t	he conditions of the Direct Debit will be made	e available within 7 days	
	Schedule Payment				
* Mandatory					
Manage existing scl	hedule payments				
Status	Description	Next Payment	Processed Payments	Amount Collected \$	Actions
FINISHED			1	10.00	







MULTI (Batch Payment)

Navigation

Click on 'MULTI' then 'Batch Payment'

HOME	SINGLE		INTERNET	ADMIN	CONFIG	SUPPORT
Batch	Payment					
Data						
		er				

3

Uploading & Processing a batch

How to upload a batch

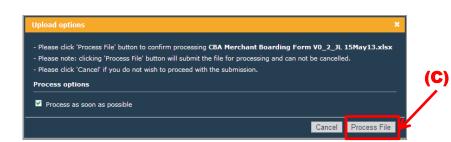
- 1. Start by clicking on the 'browse' (A) button.
- 2. Select a file from your computer to upload
- 3. Click on 'Upload & Process' (B).
- 4. If you wish to process the batch immediately, leave the Process Options tick box ticked. If you wish to process it at a later date, un-tick the box and select the day you would like it processed on.
- 5. Click on the 'Process File' (C) button.

Downloading Batch results

How to view results from your batch

- 1. Search for your batch file.
- 2. Click on the download file button in "Status/ Actions"
- Select the format you require and all results or declined only transactions.
- 4. Click on the 'Download' (D) button.

Screenshots Δ (A) **(B)** Direct Debit from Credit Cards (Batch Payment) Batch Manager Data Vault ecurring Manager Batch Payment Upload & Process batch files File to Upload: Browse Jpload & Proces: Search & download batch files Search batch files Batch status File name: Time span: All 🔽 🛛 Last 45 days 🔽 Records Value \$ Status / File Name Time submitted (AEST) Actions Uploaded Uploaded Approved Approved 1 abc.txt 2 2 100.00 100.00 05/09/2013 03:30 PM APTXU271.DAT 1 3 600.00 600.00 03/09/2013 04:33 PM ъ 3 6.00 6.00 29/08/2013 02:13 PM Kellie.txt 3







MULTI (Batch Manager)

1

Navigation

Click on 'MULTI' followed by 'Batch Payment'

HOME	SINGLE	MULTI	INTERNET	ADMIN	CONFIG	SUPPORT
Batch P	ayment					
Batch M	lanager					
Data Va						
Recurri	ng Manager					

2

3

Manually Creating a Batch

How to create a batch within the Back Office

- 1. Tick "Manually create batch file"
- 2. Enter a name for your batch file
- 3. Click 'create'
- 4. Search for your batch from your list.
- 5. Click on the relevant "Available actions" icon. To add records to your batch, click on the "+" icon.
- 6. Enter in your transaction references, card numbers, expiries, amounts and authorisation type.
- 7. Click save records

Processing a Batch

How to process your batch

1. Once a batch file has been created, the file can be edited or updated by clicking on the **edit icon (A)**

4 Screenshots

Direct Debit from Credit Cards (Batch Manager)

Batch Payment Batc	h Manager 🛞 🗌 Dat	a Vault Recurri	ng Manager		
Create new file					
Batch file creat • Please check 'N	ed successfully lanage existing files' s	ection below for man	aging your files		
Upload existing batch	n file				
File name to Create		. txt 💟 Cr	eate		(A)
Manage existing files					
Search batch manager					
File name:	Date updated:				
File name	Records	Value \$	Last updated (A	EST)	Available actions
0123456.txt	0	0.00	27/06/2013 04:01	. PM	2 🕂 🔪 🗟 🗟
0716132.csv	0	0.00	07/06/2013 03:16	i PM	🛛 🕂 📏 🗟 🗟
198212e3.txt	0	0.00	14/06/2013 03:17	' PM	2 🕂 📏 🗟 🗟
27062013.txt	0	0.00	27/06/2013 03:58	PM	2 🕂 📏 🗟 🗟
28032012.txt	3	130.00	27/06/2013 04:00	PM	2 🕂 📏 🗟 🗟
30032012.txt	0	0.00	30/03/2012 10:31	. AM	2 🕂 📏 🗟 🗟
abc.txt	2	100.00	05/09/2013 03:29	PM	2 🕂 📏 📆 🗟
adonation.txt	2	2.00	19/04/2013 08:35	i AM	2 🕂 📏 🚍 🗟
Batch Manager - Add 🛞					
Select batch manager fil	e to add records to				
Currently selected: 012345	i6.txt	\checkmark	Z Edit Existing Records		
Select a method for add	ing new records				
Add to '0123456.txt' usi	ng batch file				
Manually add records to	-				
V Save Records	Reset Form	Add More Rows			
Refer	ence	Card number	Expiry date (MMYY)	Amount (\$)	Authorisation type
1.					Recurring
2.					Recurring 💟



Batch Manager → Edit [28032012.txt]

MULTI (Batch Manager)

3

How to Edit Existing Records

- 1. Begin by locating the file name for that needs to be edited.
- 2. Click on the **'edit'** button located on the right side of the page **(B)**.
- 3. Click on the transaction that needs to be edited **(C)**.
- 4. An 'edit record' screen will populate allowing you to amend transaction details **(D)**.
- 5. Once complete, click 'Save Changes' (E).

Screenshots

atch Payment Batch	1anager 😡 🛛 Data Va	ult Recurring Mana	ger	
reate new file				
Upload existing batch fi Manually create batch f				(B)
anage existing files Search batch manager file				
	ate updated:			
File name	Records	Value \$	Last updated (AEST)	ilable actions
File nam: 0123456.txt	Records 0	Value \$ 0.00	Last updated (AEST) 27/06/2013 04:01 PM	ilable actions
0123456.txt	0	0.00	27/06/2013 04:01 PM	

(D)

	Select	t batch manager file to edit				Edit record		
	Curren	ntly selected: 28032012.txt	*			- Edit the values below	and click Save Changes button to updat	e the record
	Searc	h & Edit file					button to parmanently delete the record	
						- Click Cancel button t	to exit Whout saving.	
	Sear	ch batch manager file records -				Edit values below		
)	Refe	erence: Card number: E	xpiry date: Amount:	Authorisation type:		Reference:	acctname business ordernc	
						Card Number:	512345346	
	*	Delete Selected				Expiry Date:	0513	
Y		Reference	Card number	Expiry date	Amount \$	Amount \$:	20.00	
		acctname business orderno	512345346	0513	20.00		Recurring	
		5123456789012346	512345346	0513	100.00			Cancel Delete Record Save Change
		27062013	512345346	9900	10.00			Cancer Delete Record Save Changes

4

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Multi – Data Vault

What is it?

DATAVAULT is a tokenisation service that allows you to securely store credit card, charge card and bank account details. This allows you to become PCI DSS compliant.

1

Click on 'Multi' followed by 'Data Vault'



2

Secure (Batch | Searc Searc

Expo

Screenshots

How to add a new record

3

 Begin by clicking on 'Add New Records' (A) from the Data Vault page. The second page will allow you to enter the customers card details. Enter the following fields for each cardholder:

Once you are finished, click on the **'Save Records' (B)** button.

NOTE: To enter more data click on the 'Add More Rows' **(C)** button to add 5 more rows, up to a maximum of 30 rows.

You can retrieve the token number by returning to the Data Vault page where the token should be displayed.

e Card Details (Da	ata Vault)					displayed.				
ch Payment Ba	tch Manager Data Vault 🕖 Recurring M	lanager		<u> </u>	\checkmark	Save Records 🛛 🗞 Reset	Form S Add More Rows		(C)	
urch and edit data	a vault			L	×	Save Records	Add Mole Rows			
earch data vault rec	ords	Reference:				CRN1	CRN2	CRN3	Card number	Expiry date (MMYY)
					1.					
🏅 Delete Selected	🛉 🛉 Add New Records	A)			2. 3.					
]	Token	Account	Туре		4.					
1	5999991639274366	512345346	MC		5.					
]	5999991639274465	512345346	MC		6.					
			I+ ← Page 10 of 10 ·	+ +1	7.					
					8.					
xport Records:	Select File Format 💌 🎦 Export				9.					
					10.					

(B)



Figure 1

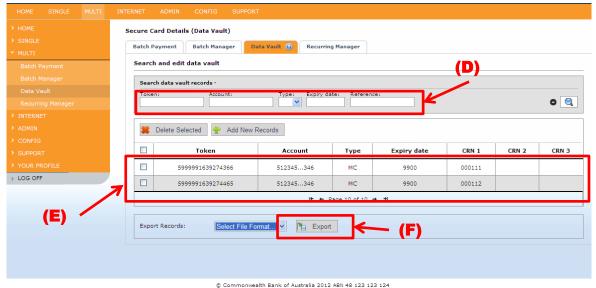
How to manage existing records

- To search for an existing record, enter details of the account in the search field (D).
- To edit an existing record, click on the record which you want to edit (E). Another page 'Edit data vault record' will populate as shown in Figure 1, allowing you to make changes to the record.

Once complete, click on the 'Save Changes' button

 You can also export the data to your computer. To export the data, simply click on the 'Export' button and select the file type that you wish to export it in (F).

Edit data vault record		×
- Click Delete Record bu - NOTE: Once deleted the - Click Cancel button if y	d click Save Changes button to save the changes. tton if you wish to delete the record. record can not be retrieved back. pu do not wish to proceed.	
Edit values below		
	5999991639274366	
	000111	
	512345346	
	9900	
Update / Delete Multiple Entries for This Card Number:	CAUTION: This option will change card details for multiple tokens in real-time	
Show Extra Fields		
	Cancel Delete Record Save Changes	





Recurring Manager - Dashboard

What is it? Allows your to keep track of your recurring transactions.

1	Click	on 'Mul	ti' fol	lowed by	'Recu	rring Ma	nager'
	HOME	SINGLE	MULTI	INTERNET	ADMIN	CONFIG	SUPPORT
	Bat	ch Payme	ent				
	Bat	ch Manag	jer				
	Dat	a Vault					
	Rec	urring Ma	nager				

3

Keeping track of your Recurring Manager

1. Begin by clicking on the 'Dashboard' button

Tray statistics – Contains the overall count/value of each tray. **Batch statistics –** Contains the state of each batch file.

Unresolved/Customer Trays - where exhausted transactions will end up.

Once a transaction ends up in one of these trays, it must be manually resolved.

2. Clicking on the '**Transaction details**' (A) icon will bring up a popup with all the transaction details.

Screenshots

HOME SINGLE MULTI Batch Payment Batch Manager	Recurring Manager Batch Payment Batch Manager Data Vault Recurring Manager () Child Merchant:
	View Tray and Batch File Statistics Resolved View Contents of Tray: Resolved
	View Contents of Tray: UnResolved
	Tray 1 View Contents of Tray: Tray 1
> LOG OFF	View Contents of Tray: Tray 2

ashboard 🥹											
Filter -											
Count O Value Pere	entage										
ray Statistics											
Statistics		Total	Resol	ved	Unr	esolved	Т	ray 1	Tray 2	1	Fray 3
Count		2	0			2		0	0		0
atch Statistics											
Filename		Sub	omitted	Approved	Recycled	Processing	Resolved	Unresolved	Tray 1	Tray 2	Tray 3
decline - testing.txt		27/	03/2013	0	0	0	0	2	0	0	0
dec_test_1.txt		27/	03/2013	1	0	0	0	0	0	0	0
dec_test_1.txt		27/	03/2013	0	0	0	0	0	0	0	0
TestBPOINT1.csv		04/0	02/2013	1	0	0	0	0	0	0	0

Recurring Manager → Tray Details

Recurring Manager → Dashboard

2

payments h	ave completed	the decline r	etry schedul	e and were still d	eclined. Please call these	e clients for alternative	e payment methods.
Submitted	CRN1	CRN2	CRN3	Amount	Card Number	Card Type	Actions
27/03/2013	test555			\$10.01	512345346	MC	🗟 🚄



Recurring Manager Dashboard

ayment o	etails		Batch Details		
	erchant Reference: test555 RN1: test555			decline - testing.txt	
				27/03/2013 03:50 PM	
Payment A	mounts		Card Details		
	\$10.01			512345346	
	inal: \$10.01			9902	
	tharge: \$0.00			\$	
Financial R	esponse Details				
Attempt	Processed	Code	De	scription	
	27/03/2013 03:50 PM		E5431-03271550:	Invalid Field : CardExp	
			E5431-03271650:	Invalid Field : CardExp	
	27/03/2013 04:50 PM				

Resolve Transaction		×
Are you sure you want to	resolve this transaction?	
Comments		
	ж. 	
	Resolve	lose

Keeping track of your Recurring Manager cont.

Transaction details contain all the transaction details including the attempt history of the declines that have occurred.

- Clicking on either the resolve icon or the resolve button (B) from the transaction detail popup will bring up the resolve screen
- Once a transaction has been manually resolved with the customer, the transaction is ready to be resolved. A comment may be added with the resolution details.
- After a transaction has been resolved it will be moved to the resolved tray.

Payment D	etails		Batch Details	
	ference: test555			decline - testing.txt
	test555			27/03/2013 03:50 PM
Payment A	mounts		Card Details	
	\$10.01			512345346
	inal: \$10.01			9902
	charge: \$0.00			2
Resolved D	etails			
	te: 02/04/2013 0	3:14 PM		
	Manually mad	le a payment (on the 2nd April 2013. Rev	ceipt number 123456789.
Financial R	esponse Details			
Attempt	Processed	Code	De	scription
1	27/03/2013 03:50 PM	7	E5431-03271550: Invalid Field : CardExp	
	27/03/2013 04:50 PM		E5431-03271650: Invalid Field : CardExp	
	27/03/2013 04:50 PM			



Themes

What is it?

The purpose of internet customisation is to allow you to customise **BPOINT**'s payment page to your own match your own preference.

Navigation

Click on 'Internet' followed by 'Themes'

HOME	SINGLE	MULTI	INTERNET	ADMIN	CONFIG	SUPPORT
Y INTE	RNET					
The	mes					
Pag						

Screenshots

How to customise your Payment Page

- Once you have landed on the BPOINT Internet payment page, click on the 'Edit Theme' button (A). From this page, you are able to customise the five (5) categories of the payments page: Home, Fonts, Headings, Background, Page Text
- 2. Once you are finished, click on the **'Save Themes' (B)** button.

For detailed information about how to customise the Internet payment page, a BPOINT Internet – Payment Page customisation guide is available upon request.

		Choose section to edit: Page 💌	Save Theme Cancel Edit Restore
HOME SINGLE MULTI	INTERNET ADMIN CONFIG SUPPORT	Home Fonts Headings Background Page Text Layout Layout Layout Tep Dirk Top Dirk	
> HOME > SINGLE > MULTI	BPOINT Internet Design Themes Pages	Work Rupit On Rupit On Text aligne Image: Control (Control (Contro) (Contro) (Control (Control (Control (Control (Contro) (Contro	
✓ INTERNET	Payment page	Reference Number:	(B)
Themes	Current BPOINT Payment Page: https://www.bpoint.com.au/payments/1000000000000000	Amount: 5 Select your card type: VISA C	(-)
Pages	Manage working theme design		
> ADMIN			
> CONFIG	Last modified Last published		
> SUPPORT	18/10/2013 03:37 PM 14/08/2013 05:15 PM 📝 Edit Theme 🔇 Publish Theme 🕅 F		
YOUR PROFILE			
> LOG OFF	(A)		
		© Commonwealth Bank of Australia 2011 ABN 48 123 123 124	

3



What is it?

This function allows you to edit the Terms, Privacy and ExtraInfo section of your customised BPOINT page.

Navigation

Click on 'Internet' followed by 'Pages'

HOME	SINGLE	MULTI	INTERNET	ADMIN	CONFIG	SUPPORT
The	emes					
Pa						
, raj	ges					



1

How to edit pages

- From the 'pages' screen, begin by selecting from the drop down box (A), the page type that you would like to edit. There are 3 options. Terms, Privacy, and ExtraInfo.
- 2. Enter the page heading that you like to have displayed on your customised page.
- 3. Enter the details in the contents box.
- 4. Once you have finished, click 'Update' (B)

2 Screenshots

POINT Internet Pages	i
Themes Pages	
Select Page Type:	
Page Heading:	Terms and Conditions
Content:	B I ∐ abe x, x' T- fT- HI- Ta Ty JL ⊟ 這 這 當 書 書 ■ 🧐 🖗
	🗷 🤏 🏟 🚔 o
	Update (B)



Search and Refund

Navigation

Click on 'admin'

2

How to search for a transaction

1. Search: You are able to search for all transactions processed within your BPOINT service. To search for a transaction, it is compulsory to enter the transaction date range for the search, all other criteria being optional as shown in **Figure 1** (defaulted to all transactions today).

[Note] Entering more information allows you to narrow down the search results.

2. Submit: Once you have inputted the details in any of the above criteria, click on the submit button to search for the transaction.

3. Transaction Details: Once you have submitted your search, the results will appear as shown in **Figure 2**. To view the full transaction details, click on the receipt number of the transaction.

Screenshots

3

saction Search	Figure 1
arch 🔞 User Manag	ement Uploads Reports Settlements Settings Notifications
Hide Search Criterion	More Search Options
Quick Search:	Today
Merchant Name:	
Receipt Number:	
Merchant Reference:	
Customer Reference:	
Amount \$:	
Card Number:	
Transaction Date:*	From 17/10/2013 12 : 00 AM 🗸
	To 18/10/2013 12 : 00 AM
Sort Order:	Ascending 💌
	🔍 Submit Search 🔞 Reset Form
ansaction Search Res	uns
Type Receipt No.	Merchant No. Approved Card Number Amount \$ Payment Date (AEDST) Actions
	No transaction records found for your search.

© Commonwealth Bank of Australia 2012 ABN 48 123 123 124

saction Se	ction Search Figure 2								
arch 🔞	User Management	Uploads	Reports	Settlements	Settings	Notifica		•	
Show Search Criterion ansaction Search Results									
Туре	Receipt No.	Merchant No.	Approved	Card Numl	per An	nount \$	Payn	nent Date (AEDST)	Actions
Payment	22041687846	0000006	~	5123453	46	10.00	16/	03/2012 02:49 PM	🗟 🖷 🙈
Payment	22041798400	0000006	*	5123453	46	10.10	16/	03/2012 02:55 PM	۵ 🗐
Payment	22313019810	0000006	*	5123453	46	2.00	26/	03/2012 04:00 PM	ه 🔊
Payment	<u>22313019811</u>	0000006	<	5123453	46	3.00	26/	03/2012 04:00 PM	🗟 🛢 🙈
Payment	22313019812	0000006	*	4000000	03	3.00	26/	03/2012 04:00 PM	ه 📄





Settings

Notifications

2

How to Refund a Transaction

1. Refund: Upon searching for the required transaction, select the refund icon and the refund popup screen will appear as shown in **Figure 3** will appear.

[note] You cannot process a refund that is greater than the purchase price. For example, if the transaction was for \$10.00, you will not be able to process a refund for \$11.00 and so on.

2. Refund Reason: enter the reason for the refund. This optional field allows you to enter additional information about why the refund is being processed.

Confirmation: After clicking on the **'Confirm Refund'** button a receipt number will be issued for the transaction. The refunded transaction will appear on the transaction list.



3 Screenshots

Transaction S	earch			
Search 🔞	User Management	Uploads	Reports	Settlements

Show Search Criterion

Transaction Search Results

Туре	Receipt No.	Merchant No.	Approved	Card Number	Amount \$	Payment Date (AEDST)	Actions
Payment	22041687846	0000006	\checkmark	512345346	10.00	16/03/2012 02:49 PM	1
Payment	22041798400	0000006	*	512345346	10.10	16/03/2012 02:55 PM	a 🖷

Figure 4

Figure 3

Refund Transaction × - Please click Confirm Refund button if you really want to process the refund. - North: Once confirmed the request can not be reverted. - Click Cancel if you do not wish to proceed. Refund Result Payment Date: 28/10/2011 12:02 AM AEST Merchant Number: 0000000000000 Merchant Reference: ant CRN1: ant CRN2: signup Refund Amount \$** 100.00 Card Number: 0513 Refund Reason: Cance Confirm Refund



What is it?

Provides you with the ability to manage multiple user accounts, including add, remove, or update user details.

Navigation

Click on 'admin' followed by 'user management'

HOME	SINGLE	MULTI	INTERNET	ADMIN	CONFIG	SUPPORT
er Mana	agement					

Screenshots

User Management

3

2 Managing Users

After selecting the required users via the checkboxes (A), you have the following options:

Delete Selected: this will permanently delete the user

Reset password: this will reset the user's password and the new password is sent to their email address

Deactivate Selected: this will deactivate the user, meaning that they will not be able to login

Search	users -			
User Na	ame: Email:	Child Merchant:		
& A	Add New User 🛛 🍇 Dele	ete Selected 🛛 😞 Reset Password 👌 Deacti		
~~ ·		ete Selected 🧼 Reset Password 🕥 Deactr	vate Selected	
	User name	Email address	Permissions	Display name
				Display name
	User name	Email address	Permissions	





Adding a New User

• First click on 'Add New User' or on an existing user and complete details as per Figure 1

Note: User Permissions - refer to the table below

Daily Allowed Refund: Number of successful refund transactions that user will be allowed to perform in one If left blank, no limit will be set for the user.

Daily Refund Amount: \$ total daily refund amount. User will be able to process refunds where the total refunded value does not exceed this limit. If left blank, no limit will be set for the user.

- · Confirm Your Password: type in your current password.
- Create User: click on save to create/edit the user.

ser Management → Create	Figure 1
Create User 🔞	
Child Merchant:	×
User Name:*	
Email Address:*	
Display Name:	
Activate User:	V
User Permissions:*	Manager (T1)
Daily Allowed Refunds:	
Daily Refund Amount: \$	
Confirm Your Password:*	
	Create User

	Search Transactions	Refund	Add/Remove Users	Visible Modules	Change Limits
Search Operator Only	✓	×	×	×	×
Operator (S)	×	×	×	SINGLE	×
Operator (M)	×	×	×	MULTI	×
Manager (T2)	×	×	×	SINGLE/MULTI	×
Manager (T1)	\checkmark	\checkmark	✓	SINGLE/MULTI	\checkmark
Administrator*	\checkmark	✓	✓	SINGLE/MULTI	✓



Uploads

What is it?

BPOINT allows you to update all the CRN values for the internet payment page. You can automate biller rules across their internet and phone based payments by uploading a file here.

1

Navigation

Click on 'Admin' followed by 'Uploads'

HOME	SINGLE	MULTI	INTERNET	ADMIN	CONFIG	SUPPORT
Trar	nsaction Sea	rch				
		nt				
Uplo						
Rep						
Set						
Set						
Not	ifications					
	ile Uploads					
			_			
Sea		r Manageme	ent Uploa	ds 🕐	Reports	Settlement
Sea Plea Sen	rch User	d upload yo	ur BPOINT iSer	Browse	ere (E.g. Pen	

How to upload

3

To load a CRN file, ensure that the format is saved in CSV (Comma Separated Variables) format.

- 1. Click on the browse button (A) to locate the file from your computer.
- 2. Enter the email address for the confirmation request to be sent to.
- 3. Once complete, click on the upload button **(B)**.

A detailed guide on how to set up a CRN file is available upon request.

Note: Once a CRN file has been uploaded, all previous CRN's are removed.



Daily Reports

What is it?

Daily reports show the break up and grand total of transactions processed for each day*

1

Navigation

Click on 'admin' button followed by 'Reports'

HOME	SINGLE	MULTI	INTERNET	ADMIN	CONFIG	SUPPORT
✓ ADMIN						
Transact	tion Search					
Settings						
Notificat	ions					
aily Reports		ploads Report	s 🕑 Settlements	Settings	lotifications	
aily Reports Search User I			s 😧	Settings	lotifications	
aily Reports Search User I	Management U		Settlements	Settings	lotifications	
aily Reports Search User I Search and dow	Management U	ts	s 💿 Settlements	Settings	lotifications	
aily Reports Search User I Search and dow Search daily reg Date From: 16/10/2013	Management U mload daily repor norts - Date To:	ts	s 😧 Settlements	Settings 1	lotifications	
aily Reports Search User I Search and dow Search daily reg Date From 16/10/2013 File Name	Management U ₁ nload daily repor norts - Date To: 17/10/2013	ts	s 🕑 Settlements	Settings 1	lotifications	
aily Reports Search User I Search and dow Search daily reg Date From 16/10/2013 File Name CouncilPay_	Management U ₁ mload daily repor orts - Date To: 17/10/2013 20131015_1000000	ts	s 🕐 Settlements	Settings	lotifications	
aily Reports Search User I Search and dow Search daily reg Date From: 16/10/2013 File Name CouncilPay_ Schedule_2	Management UI Inload daily report orts - Date To: 17/10/2013 20131015_1000000 20131015_10000000	ts 00000006.csv 00000006.csv		Settings	lotifications	
aily Reports Search User I Search and dow Search daily rep Date From: 16/10/2013 File Name CouncilPay_ Scheduled_ BOINT_201	Management U ₁ mload daily repor orts - Date To: 17/10/2013 20131015_1000000	ts 000000006.csv 000000006.csv 0000000006.csv		Settings	lotifications	

2

How to generate a daily report

- 1. Enter the period and the date range for which the reports are required **(A)**.
- 2. Click on the search button **(B)** on the right hand side of the page. The search results displayed will be in excel CSV (commaseparated values) format.
- 3. To download the file, click on the file name.

Search	User Management	Uploads	Reports 😡	Settlements	Settings	Notifications		
Search a	nd download daily re	eports						
Search d	daily reports -							
Date Fro 16/10/2							_	
File Nar	me						Created On	
Cour	ncilPay_20131015_100	2000000000000000	D6.csv				16/10/2013 01:15 AM	
Sche	duled_20131015_1000	.00000000000	6.csv				16/10/2013 01:15 AM	
📄 врој	INT_20131015_201310	15_10000000	00000006.csv				16/10/2013 01:14 AM	
📄 Data	Vault_20131015_1000	00000000006	6.csv				16/10/2013 01:14 AM	
-	INT_20131015_100000						16/10/2013 12:30 AM	



Settlements Report

What is it?

1

(A)

Settlement reports matches what the merchant receives in their bank account as a settlement*

Navigation

Click on 'admin' followed by 'Settlements'

HOME	SINGLE	MULTI	INTERNET	ADMIN	CONFIG	SUPPORT
Y ADMIN						
Transactio	n Search					

3 Screenshots

How to generate settlement reports

- 1. Enter the period and the date range for which the statements are required (A).
- 2. Click on the search button **(B)** on the right hand side of the page. The search results will show the breakdown of transaction entered for different card types followed by the total amount of transactions for the period
- 3. You also have the option to download the data in excel format, by clicking on the download button on the left hand side of the page

)	(<u> </u>										(B)
Search	User Management	Uploads	Reports	Settlements 🕢	Setting	s Notifications						
Search a	and download settlen	ent reports										· · · · ·
Conschu	settlementreports -											
Period:	-	Date	Tor	Cuild Merchant:								_
				Cillo Merchanc:								
Daily	09/10/2013	16/1	0/2013		1	×						
Daily	• 09/10/2013	16/1	0/2013			1						
Daily		16/1					o trata	Bank Ac	count \$	•	Discust	T-1-1 4
Daily	09/10/2013	16/1		MasterCard \$		Visa \$	Sub Total \$	Bank Ac Pay	count \$ Rej	Amex \$	Diners \$	Total \$
Daily					10.00		Sub Total \$ 510.00			Amex \$ 0.00	Diners \$ 0.00	Total \$
	Date	3		5		Visa \$		Pay	Rej			



Settings – Receipt Customisation

What is it?

This function allows you to customise the way receipts are displayed for your customer when a transaction is submitted.

1 Navigation Click on 'admin' button followed by 'settings'						2	Back Office Settings Search User Managen Merchant Receipt Detail Trading Name: ABN: ACN:	ls Joe's Plumbing 48123123124	iettlements Settin	9 () Notifications	
HOME	SINGLE	MULTI	INTERNET	ADMIN	CONFIG	SUPPORT		Address Line 1: Address Line 2:	25 Bourke St		
Y ADMIN								Suburb: State:	Melbourne VIC		
Transaction S	earch							Postcode:	3000		
	nent							Phone Number: Fax Number:	03 9375 8874		
								URL:	www.joesplumbing.com.au		
								Email Address: Receipt Message:	kien.luu@cba.com.au		
								brother backonice cog	Thanks for calling Joes Plumbing		
								Upload Backoffice Logo:		Browse	
Notifications									Update		
3 н	ow to c	ustomis	e your ree	ceipt						Joe's Plumb ABN: 48 123 25 Bourke Si Melbourne, Phone: 03 9 Web: www.	123124 t 17(, 3000 3758874 <u>Joesplumbing.com.au</u> uu <u>@cba.com.au</u>
de	tails (not	e: the ba	the busine: ick office lo to the rece	go is a s						You Have Pa Customer Ri Customer Ri Merchant Ri Source: Payment An	id: TEST BPOINT Test 6 eference 1: 654321 eference 2: eference 3: eference: eCommerce ount \$: 50.00
			k on ' upda submitting							Payment Da Receipt Nun Thanks for c	9900 nn Result - Approved
											wealth Bank of Australia 2011 ABN 48 123 123 124

Notifications



Navigation

Click on 'ADMIN' tab, then notifications

НОМЕ	SINGLE	MULTI	INTERNET	ADMIN	CONFIG	SUPPOR
Trans	action Sear	rch				

Screenshots

Set up a new notifications contact

	nt Uploads Reports Settlements Settin	gs Notifications 🕢
stem Notifications		
Name	Email	Actions
] Jane Smith	janesmith@company.com.au	2 👼
🔒 John Tester	johntester@company.com.au	2 🗟
Add New Contact	Notification Details	×
	Add Notification Contact	
	Name:	
	Email:	
	Enabled:	

3 More Information

When will you receive notifications? We'll notify you of:

- Upcoming planned maintenance windows
- Any service interruptions being experienced by BPOINT and when they've been resolved
- Any issues relating to your merchant account such as settlement delays
- Release activities where we introduce exciting new functionality and features

Click on notifications

1. To Add a new email recipient: click on Add New Contact

A window will populate allowing you to add a contact to receive email notifications. Once complete, click on the **'Save'** button denoted by **(A)**.

- 2. To **edit** existing recipient details: click on icon
- 3. To **delete** existing recipient: click on icon 📅





What is it?

The BPOINT eForms module is a powerful tool that allows you to create and publish online forms. The form can be integrated with your BPOINT Payment Page and BPOINT's Electronic Direct Debit Registration (eDDR).

1

2

Navigation

Click on 'config' followed by 'eforms' and then 'Launch forms designer'

	INTERNET ADMIN CONFIG SUPPORT						
	BPOINT eForms Page						
	eForms Fraud Control Recurring Manager Messaging						
	erorms Fraud Control Recurring Manager Messaging						
	Welcome to the BPOINT eForms module. eForms allows you to create and publish online forms designer. It has a drag and drop interface which makes it simple to build a secure form.						
	Please note: the forms designer will be launched in a new window and does not support simultaneous user editing. Only one user at a time						
eForms	Prease note: the forms designer will be launched in a new window and does not support simultaneous user editing. Only one user at a time should edit forms.						
	The stand desired as a Relative bullet bullet						
	To start designing, click the button below.						
	Launch forms designer						

Create a new eForm

Click on 'New Form' as shown in **(A).** A new screen will populate allowing you to build your form. To build the form, drag and drop the form elements (from the

left hand panel) into the Form Design panel. Three groups of fields are available as shown in **Figure 1**:

- Elements
- Quick Parts
- Payment

Screenshots

3

	My Forms
\sim	
B P O I N T' Receivables Solution	
Hy Forms	
lew Form	
Form Title Z->A 💌	
(A)	

Figure 1

Elements		Quick Parts
Heading		🛓 Full Name
Text Box		🖂 E-mail
Text Area		📕 Address
Drop Down		📕 Phone
Radio Button		Date Picker
Check Box		123 Number
T CRN1		Payment
Ĩ☐ CRN2		
Ĩ́⊐ CRN3		BPOINT Credit Card
🚛 Amount		BPOINT DataVault
Submit Button	1000	





2

BPOINT Payment page

To integrate a BPOINT Payment type to the form, as an example, drag and drop the **BPOINT Credit Card** field/icon from the payment section on the left panel to the Form Designer panel.

If Biller Codes have been created for your Merchant Facility, select a Biller Code and click 'Finish'.

Contact the BPOINT Support team if you need to setup another Biller Code.

BPOINT eDDR Integration

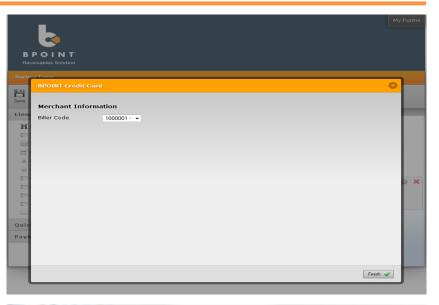
BPOINT eDDR is used to register either a Credit Card or a Bank Account for recurring payments.

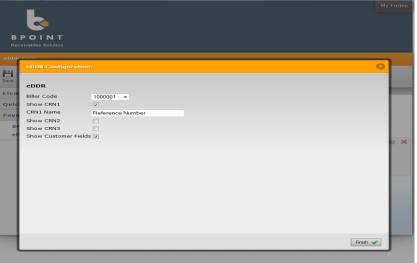
To integrate BPOINT eDDR to the form, drag and drop the BPOINT eDDR icon, from the payment section on the left panel, to the Form Design panel.

The eDDR Configuration page allows you to:

- Select the Biller Code (optional).
- Choose whether or not to display CRN on the eDDR Page, as well as setting the display name for them
- Choose whether to show Customer Fields on eDDR Page.

Once complete, click 'Finish'









2

Publishing the form

After finishing the form design, click the **Save** button **(B)**. Click '**My Forms (C)**, to view the list of forms that have been created.

Once saved, you will need to click on **'publish'** for customers to see your saved changes.

If the form publishing is successful, the publish date will be displayed, and the URL **(D)** of the published form can be obtained by clicking the **Get URL** link.

This URL may now be provided to your customer.

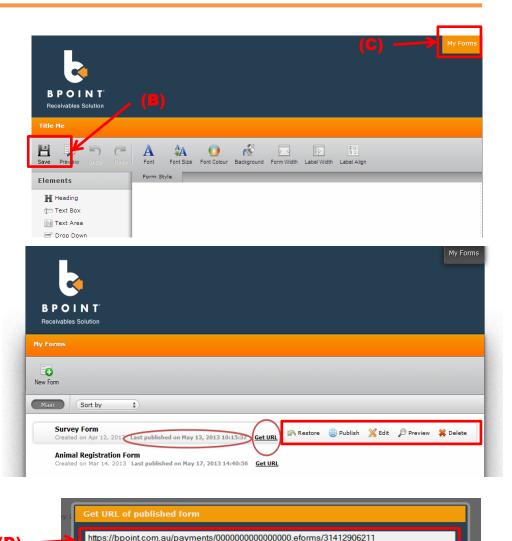
Other functions

- Restore restores the previous saved design
- Edit allows you to amend the selected design

Preview – allows you to view the design before publishing the form

(D

Delete - remove the selected form



Close



Fraud Controls

What is it?

BPOINT allows you to set up rules in a CSV file that blocks certain types of transactions, helping you to reduce fraud risk.

1

Navigation

Screenshots

Click on 'Config' followed by 'Fraud Control'

eForms Fraud Cor					
Fraud Co					
	ntrol				
Recurring Manager					
Messagin	g				

(A)

How to set up Fraud Controls

3

To load a control file, ensure that the format is saved in CSV (Comma Separated Variables) format.

- 1. Click on the browse button (A) to locate the file from your computer.
- 2. Once you have selected the file, click on the upload button **(B)**.

A detailed guide on how to set up a Fraud Controls is available upon request.

Note: Once a Fraud Control file has been uploaded, all previous Fraud Controls are removed.



(B)



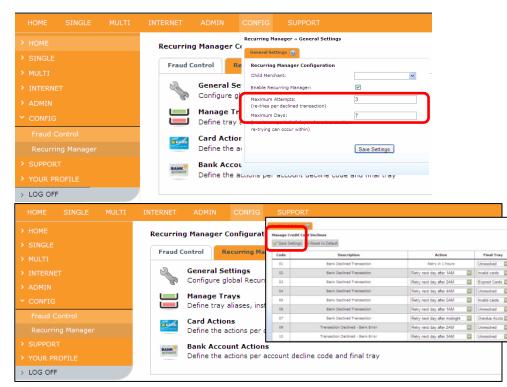
Recurring Manager

What is it?

Provides you with the ability to set up reprocessing rules for declined recurring transactions. It removes the need to manually reprocess a declined transaction.

Navigation

Click on 'Config' followed by 'Recurring Manager'



Setting up Recurring Manager

2

 Click on 'General Settings'- this will allow you to configure your recurring settings, depicted in Figure 1.

Note: Maximum days will take precedence over maximum attempts

2. Once the parameters have been set, click on **'Save Settings'**.

Customising your Recurring Manager

1. Click on 'Card Actions' or 'Bank Account Actions'

BPOINT will automatically action declined recurring transactions based on rules that you have set up. You can also set up "trays" that manage all your particular decline transaction types.

2. Once complete, click on 'Save Settings'

NOTE: Recurring manager does not manage declined scheduled payments