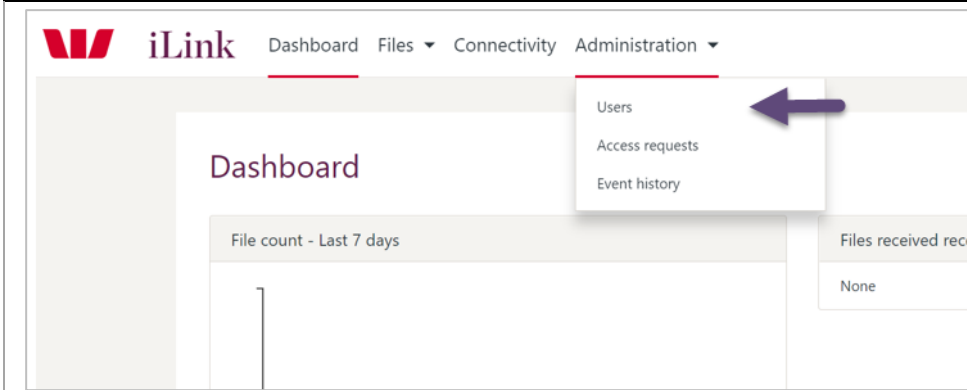


INTRODUCTION

Follow this guide to create a User on your iLink system.

Note: User establishment form must be completed, signed, and sent to Westpac to complete the identification and verification process which is a regulatory requirement.

STEP BY STEP GUIDE – mock customer data is displayed below, for demonstration purposes only.

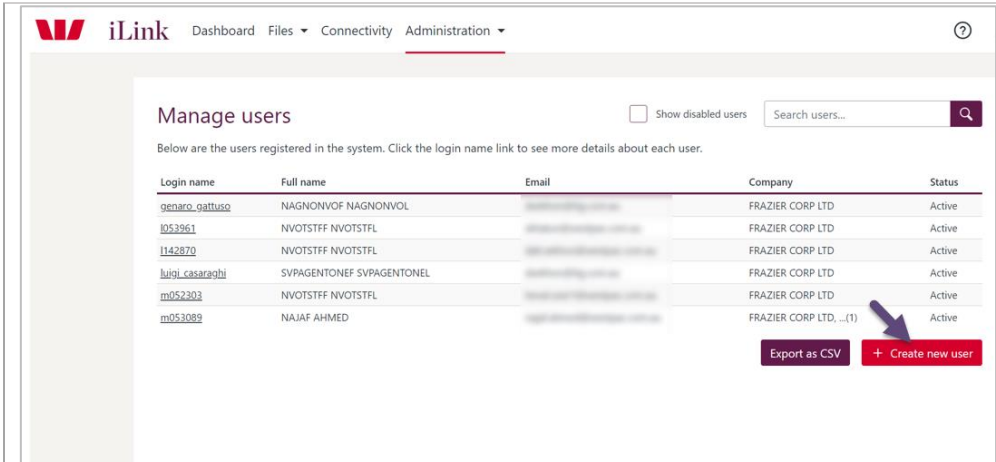


The screenshot shows the iLink Administration dropdown menu. The 'Users' option is highlighted with a blue arrow pointing to it. The menu also includes 'Access requests' and 'Event history'. The background shows the 'Dashboard' page with a 'File count - Last 7 days' chart and a 'Files received rec' section.

Login to iLink

Administration > Users

From the Administration drop down, select Users.



The screenshot shows the 'Manage users' page in iLink. It features a search bar, a 'Show disabled users' checkbox, and a table of registered users. A blue arrow points to the '+ Create new user' button at the bottom right of the table.

Login name	Full name	Email	Company	Status
genaro_gattuso	NAGNONVOF NAGNONVOL	[redacted]	FRAZIER CORP LTD	Active
053961	NVOTSTFF NVOTSTFL	[redacted]	FRAZIER CORP LTD	Active
1142870	NVOTSTFF NVOTSTFL	[redacted]	FRAZIER CORP LTD	Active
luigi_casaraighi	SVPAGENTONEF SVPAGENTONEL	[redacted]	FRAZIER CORP LTD	Active
m052303	NVOTSTFF NVOTSTFL	[redacted]	FRAZIER CORP LTD	Active
m053089	NAJAF AHMED	[redacted]	FRAZIER CORP LTD, ... (1)	Active

To create the new user, click the **Create New User** button.

STEP BY STEP GUIDE CONT. – mock customer data is displayed below, for demonstration purposes only.

Create new user

Enter the details for the new user. Please enter your own password at the bottom of this page to confirm your changes.

Details

Login name:

Full name *

Work phone number:

Mobile phone number:

Email address *

Email notifications: Receive email notifications

Page to show after login *:

Time zone *:

Email password: Email temporary password to user

Tasks this user can perform

	Upload Files	Search and Download Files	Setup Connectivity	Company Administrator
FRAZIER CORP LTD	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FREDREICK FRAZIER CORP LTD	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Add company:

The system will display the user form.

Enter the contact details such as **email address, phone and mobile.**

Select the tasks that this user will perform on the portal.

i This request for access requires that the user be identified and verified before user access is enabled.

Customer identification

Westpac customer number:

A Westpac Customer Number (or Customer ID) is the 8 digit number an individual is given by Westpac when they become a customer. We will use the Customer Number to check that a new user's identity has been verified by Westpac. To obtain an existing Customer Number, please contact your Westpac Relationship Manager/Transactional Banking Manager. If the new user is not an existing Westpac customer, or does not wish to use their existing Customer Number profile, please leave this field blank and we will verify their identity separately before access to this portal can be granted.

Date of birth *:

Enter the Date of birth as displayed in the identification documents submitted to Westpac to avoid delays in processing your access request.

⚠️ Please ensure that the user's Full name (including middle names if applicable) matches the identification documents submitted to Westpac to avoid delays in processing your access request.

Declaration

I confirm that I am authorised to manage users on behalf of my organisation. I confirm the individual has been made aware of the contents of the Privacy Notice and that they have confirmed that they have read, understand and accept the Privacy Notice.

Password

Enter your own password for security.

Login name:

Password *:

Enter existing **customer number** with Westpac (if the user is already a customer).

Enter **date of birth**.

TIP: If typing into the field, enter the month as AUG or JUN etc. rather than using numbers e.g. 20 FEB 1980

Complete the **mandatory declaration**.

Login name and password for enhanced security.

Click **Save** button

Steps to continue on next page.

STEP BY STEP GUIDE CONT. – mock customer data is displayed below, for demonstration purposes only.

<p>Access request created</p> <p>An access request has been created with the details below. You will receive an email advising the outcome once the request has been processed.</p> <p>User details</p> <p>Login name: test</p> <p>Full name: [redacted]</p> <p>Email address: [redacted]</p>	<p>After the new user screen has been entered and saved, a shell profile will be created.</p>																																			
<p>Manage users</p> <p><input type="checkbox"/> Show disabled users Search users... </p> <p>Below are the users registered in the system. Click the login name link to see more details about each user.</p> <table border="1"> <thead> <tr> <th>Login name</th> <th>Full name</th> <th>Email</th> <th>Company</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>genaro_gattuso</td> <td>NAGNONVOF NAGNONVOL</td> <td>[redacted]</td> <td>FRAZIER CORP LTD</td> <td>Active</td> </tr> <tr> <td>j053961</td> <td>NVOTSTFF NVOTSTFL</td> <td>[redacted]</td> <td>FRAZIER CORP LTD</td> <td>Active</td> </tr> <tr> <td>1142870</td> <td>NVOTSTFF NVOTSTFL</td> <td>[redacted]</td> <td>FRAZIER CORP LTD</td> <td>Active</td> </tr> <tr> <td>luigi_casaraghi</td> <td>SVPAGENTONEF SVPAGENTONEL</td> <td>[redacted]</td> <td>FRAZIER CORP LTD</td> <td>Active</td> </tr> <tr> <td>m052303</td> <td>NVOTSTFF NVOTSTFL</td> <td>[redacted]</td> <td>FRAZIER CORP LTD</td> <td>Active</td> </tr> <tr> <td>m053089</td> <td>NAJAF AHMED</td> <td>[redacted]</td> <td>FRAZIER CORP LTD, ...(1)</td> <td>Active</td> </tr> </tbody> </table> <p>Export as CSV + Create new user</p>	Login name	Full name	Email	Company	Status	genaro_gattuso	NAGNONVOF NAGNONVOL	[redacted]	FRAZIER CORP LTD	Active	j053961	NVOTSTFF NVOTSTFL	[redacted]	FRAZIER CORP LTD	Active	1142870	NVOTSTFF NVOTSTFL	[redacted]	FRAZIER CORP LTD	Active	luigi_casaraghi	SVPAGENTONEF SVPAGENTONEL	[redacted]	FRAZIER CORP LTD	Active	m052303	NVOTSTFF NVOTSTFL	[redacted]	FRAZIER CORP LTD	Active	m053089	NAJAF AHMED	[redacted]	FRAZIER CORP LTD, ...(1)	Active	<p>Upon successful identification and verification checks, the user status will be changed to 'Active.'</p> <hr/> <p>If a user profile does not meet Westpac's identification and verification requirements, your Westpac representative will contact the administrator /user for the required information or discuss the next steps.</p> <hr/> <p>See below for more information on applicable forms.</p>
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APPLICABLE FORMS

- The User Establishment Forms** are required to be completed and signed by all the new users to the system. The Westpac's identification and verification checks require the signed forms to be sent to Westpac representative to kick-start the process.
- The Verifying Officer Nomination/Removal form** is required if your Organisation wishes to adhere to the verifying officer model. Please check the requirements on the form.
- A new Administrator Establishment/Removal form** has been created for users who request to be setup as administrators. If the administrator also acts as a Verifying Officer, they will need to complete both forms.

On receipt of the completed forms, the checks will be initiated by Westpac team and the access will be enabled on the system once the checks are complete.

Please contact your Westpac representative if you have any questions.