

## **INTRODUCTION**

#### Follow this guide to create a User on your iLink or PaymentsPlus systems.

**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.

Home  My Info  Administration	
Add Buyer Import Buyer Search Buyers Sandbox Buyers Users Pending Users Access Request History Audit History Login History	Login to PaymentsPlus or iLink Administration > Users From the Administration drop down, select Users.

Users Buyer Name: Buyer Code: Facility Types: Go to Page:	FRAZIER CORP LTD FRAZIER Australian Domestic Payables Users	Go View	As Buyer	Westpac	To create the new user, click the <b>Create New User</b> button.
Users				Page 1 of 2	
Login Name	Full Name	Email	Status	Admin	
KINGSLEY COMAN	NVOTSTEF NVOTSTEL	enclosed@parent.com	Enabled	4	
FRZADMN001	NVOTSTFF NVOTSTFL	he al cost @vertpec.com.au	Enabled	4	
L142870 PP	NVOTSTEF NVOTSTEL	dal settor \$vertpactor ac	Enabled	4	
F060264 PP	NVOTSTFF NVOTSTFL	page in Brentes on Ar	Enabled	1	
REMRLTST002	FULLPONEF FULLPONEZ	*(chight)const	Enabled		
LEROY SANE	NAGNONVOF NAGNONVOL	enclosed@parent.com	Enabled		
AGENTNONVOTST01	NAGNONVOF NAGNONVOL	2000-001/com.au	Enabled		
ADMINDUALT001	NAGNONVOF NAGNONVOL	he al cost @vertpac.com.ac	Enabled		
« c 1 2 , »			Crea	ste New User	



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

Edit User Buyer Name: Buyer Code: Facility Types:	FRAZIER CORP LTD FRAZIER Australian Domestic Payables	Westpac	The system will display the user form
User Details			
* Login Name:			
* Full Name:	Enter the Full Name (including middle names if applicable) as displayed in the identification documents submitted to Westpac to avoid access request.	delays in processing your	
* Email:			
* Phone:			
Mobile:			
Tasks This User Can Perform			
* User Tasks:	Upload Payment/Invoice Files		
	Payment Maintenance		
	Authorise Payment Files		
	Send Recipient Invites		
	Manage Users		
	View Portal Data		

Edit User	FRAZIER CORP LTD	Complete the details as
Buyer Code:	FRAZIER	tollows for the user:
Facility Types:	Australian Domestic Payables	
User Details		Enter the
* Login Name:	LoginName	Login name and Full
* Full Name:	FullName True the FullName (including middle names if applicable) as displayed in the identification documents submitted to Westpac to avoid delays in processing your	name.
★ Email: ★ Phone:	access request. Email@email.com O456363738	<b>TIP:</b> Information text will display below certain fields to assist you.
Mobile:		Enter the contact details
■ Iasks This User Can Pe	Upload Payment/Invoice Files	phone and mobile.
	Payment Maintenance         Authorise Payment Files         Send Recipient Invites         Manage Users         View Portal Data	<b>Select the tasks</b> that this user will perform on the portal.

Steps to continue on next page.





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

Ves	Back Save and Request Access	Click Save and Request
Declaration confirm that I have obtained au Notice and that we will handle th	ithorisation to manage the users on behalf of the organisation. I confirm the individual has been made aware of the contents of the Privacy heir personal information in accordance with our Privacy policy and they have confirmed that they accept the Privacy Notice.	Complete the <b>mandatory</b>
* Date of Birth:	yreview.            12 JUN 1986         Image: Comparison of the second	enter the month as AUG or JUN etc. rather than using numbers e.g. 20 FEB 1980
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 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 exceeded.	Enter <b>date of birth</b> . <b>TIP:</b> If typing into the field,
Organisation CIS Key:	15580820065	customer).
Identification		(if the user is already a
Receive File Authorisation Email Notifications:	Yes	number with Westpac
Email Nouncations		Enter existing <b>customer</b>

Lentification and verification		
zen requested. Please submit an authorised <u>User Establishment Form</u> with required documentation for the User to verify their identity if they		saved, a shell profile will be
Pending IDV L132232 (Lisa Munro)		created.
10 Jun 2021 12:53 AEST		6.1
Create New User		A summary of the user
PS-3303		details with the <b>Approval</b>
FRAZIER CORP_LTD_(FRAZIER)		<b>Status</b> will be displayed.
		1 3
LOGINNAME		
Full Name		
12-Jun-1986		
email@email.com		
0435672842		
Enabled This user can sign-in.		
Upload Payment/Invoice Files Payment Maintenance		
Back Reject Cf	hange	
	erification een requested. Please submit an authorised User Establishment Form with required documentation for the User to verify their identity if they U133232 (Lisa Murro) 10 Jun 2021 12:53 AEST Create New User P5-3303 ERAZIER CORP LTD (FRAZIER) LOGINNAME Full Name 12:Jun-1986 email@email.com 0435672842 ExetC This user can sign-in. Upload Payment/invoice Files Payment Maintenance	erification       X         ere requested. Please submit an authorised User Establishment Form with required documentation for the User to verify their identity if these         Unable V       V         U32322 (Lisa Murro)         10 Jun 2021 12:53 AEST         Create New User         P3-333         EACIER CORP LITO (FRAZIER)         LOGINNAME         Full Name         12 Jun-1986         email@email.com         AUS572842         Exerce         This user can sign-in.         Upload Payment/Invoice Files         Payment Maintenance         Dupload Payment/Invoice Files         Payment Maintenance

Steps to continue on next page.



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

JSERS Buyer Name: Buyer Code: Facility Types: 50 to Page:	FRAZIER CORP LTD FRAZIER Australian Domestic Payables	Co View	As Rupper	Westpac	Upon successful identification and verification checks, the use status will be changed to 'Enabled'
Isers	03613		AS Duyer	Page 1 of 2	
Login Name	Full Name	Email	Status	Admin	If a user profile does not
KINGSLEY COMAN	NVOTSTFF NVOTSTFL	enclosed@parent.com	Enabled	4	meet Westpac's
FRZADMN001	NVOTSTFF NVOTSTFL	hereilizen Greetpelizen au	Enabled	4	identification and
L142870 PP	NVOTSTFF NVOTSTFL	dal anthon @vertpac.com.au	Enabled	1	verification requirements,
F060264 PP	NVOTSTFF NVOTSTFL	paiges in divertipes com as	Enabled	4	your Westpac
REMRLTST002	FULLPONEF FULLPONEZ	minima de la coma	Enabled		representative will contac
LEROY SANE	NAGNONVOF NAGNONVOL	chotenaid@parent.com	Enabled		the required information
AGENTNONVOTST01	NAGNONVOF NAGNONVOL	(Meding) com au	Enabled		or discuss the next steps.
ADMINDUALT001	NAGNONVOF NAGNONVOL	hereilizen Greetpelizen au	Enabled		
« ( <b>1</b> 2 ) »			Creat	e New User	See below for more information on applicable forms.

### **APPLICABLE FORMS**

- 1. **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.
- 2. **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.
- 3. **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.

