

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 ▾

Dashboard

Welcome to PaymentsPlus.

- 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: FRAZIER CORP LTD
 Buyer Code: FRAZIER
 Facility Types: Australian Domestic Payables

Go to Page: Go View As Buyer

Users Page 1 of 2

Login Name	Full Name	Email	Status	Admin
KINGSLEY_COMAN	NVOTSTFF NVOTSTFL	coman@westpac.com	Enabled	✓
FRZADMN001	NVOTSTFF NVOTSTFL	frzadm@westpac.com.au	Enabled	✓
L142870_PP	NVOTSTFF NVOTSTFL	l142870@westpac.com.au	Enabled	✓
F060264_PP	NVOTSTFF NVOTSTFL	f060264@westpac.com.au	Enabled	✓
REMLTST002	FULLPONEF FULLPONEZ	remltst@westpac.com.au	Enabled	
LEROY_SANE	NAGNONVOF NAGNONVOL	lroy@westpac.com	Enabled	
AGENTNONVOTST01	NAGNONVOF NAGNONVOL	agent@westpac.com.au	Enabled	
ADMINDUALT001	NAGNONVOF NAGNONVOL	admindual@westpac.com.au	Enabled	

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Create New User

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.

Edit User

Buyer Name: FRAZIER CORP LTD
Buyer Code: FRAZIER
Facility Types: Australian Domestic Payables

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 delays in processing your access request.

* 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

The system will display the user form

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Complete the details as follows for the user:

Enter the **Login name and Full name.**

TIP: Information text will display below certain fields to assist you.

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

Select the tasks 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.

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**.

Click **Save and Request Access** button

After the new user screen has been entered and saved, a shell profile will be created.

A summary of the user details with the **Approval Status** will be displayed.

Steps to continue on next page.

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

Users

Buyer Name: FRAZIER CORP LTD
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Go to Page: Go View As Buyer

Users

Page 1 of 2

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FD60264_PP	NVOTSTFF NVOTSTFL	fd60264@westpac.com.au	Enabled	✓
REMLTST002	FULLPONEF FULLPONEZ	remltst02@westpac.com.au	Enabled	
LEROY_SANE	NAGNONVOF NAGNONVOL	lroy@westpac.com.au	Enabled	
AGENTNONVOTST01	NAGNONVOF NAGNONVOL	agentnon@westpac.com.au	Enabled	
ADMINDUALT001	NAGNONVOF NAGNONVOL	admindual@westpac.com.au	Enabled	

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Create New User

Upon successful identification and verification checks, the user status will be changed to 'Enabled'.

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.

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.

