Quick Reference Guides

Table of Contents
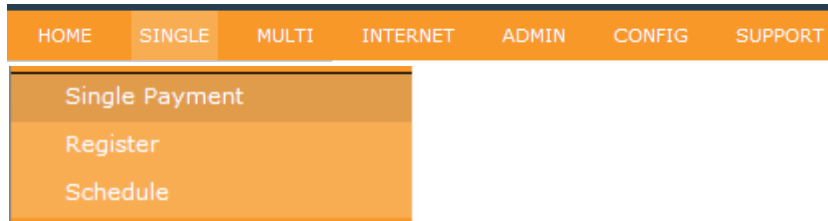
B POINT®
Receivables Solution

① Navigation

Click on 'SINGLE' then 'Single Payments'

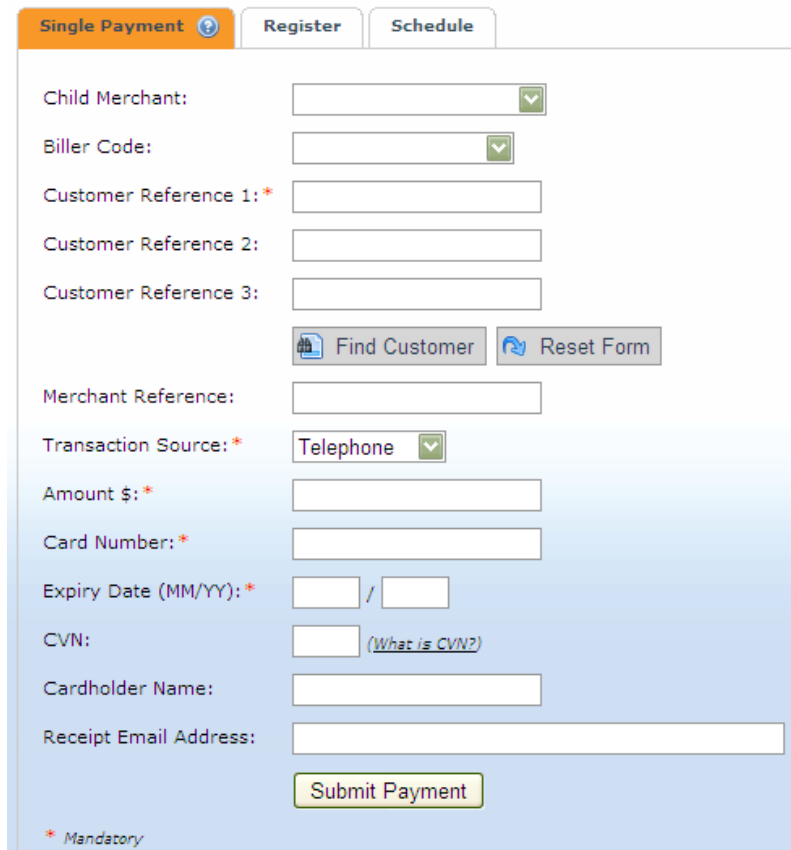| HOME	SINGLE	MULTI	INTERNET	ADMIN	CONFIG	SUPPORT

Single Payment
Register
Schedule

③ 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"**

③ Screenshots

Single Payments in RealTime

Single Payment ⑦	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: [   ] (*What is CVN?*)
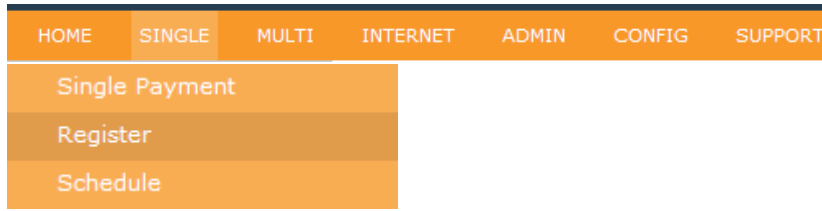
Cardholder Name: [   ]

Receipt Email Address: [   ]

[Submit Payment]

* Mandatory

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1 Navigation

Click on 'SINGLE' followed by 'Register'

HOME	SINGLE	MULTI	INTERNET	ADMIN	CONFIG	SUPPORT

Single Payment
Register
Schedule

2 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
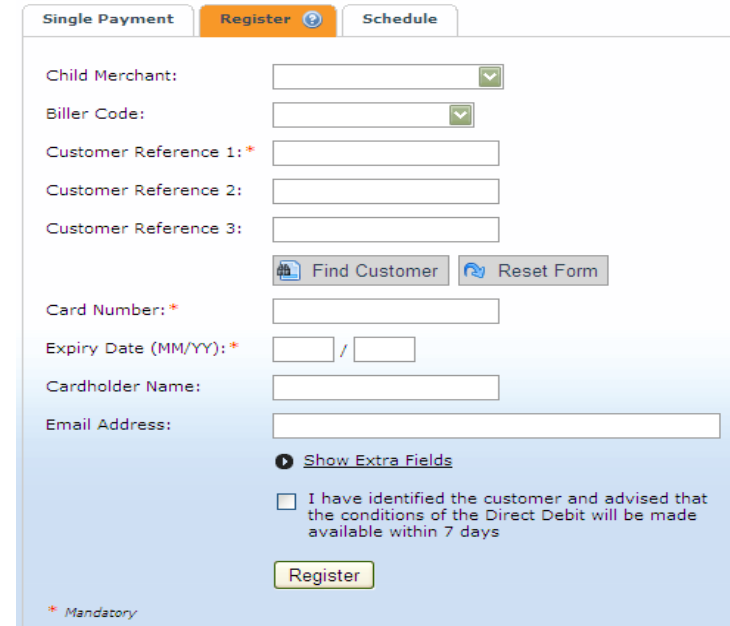6. Click on **Register**

3 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"

4 Screenshots

Register payment methods

Single Payment	Register ?	Schedule

Child Merchant:
Biller Code:
Customer Reference 1: *
Customer Reference 2:
Customer Reference 3:

🔍 Find Customer   🔄 Reset Form

Card Number: *
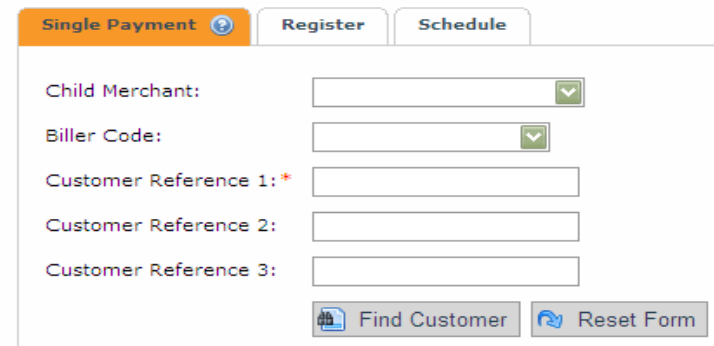Expiry Date (MM/YY): *   /
Cardholder Name:
Email Address:

▶ 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

Mandatory

Single Payments in RealTime

Single Payment ?	Register	Schedule

Child Merchant:
Biller Code:
Customer Reference 1: *
Customer Reference 2:
Customer Reference 3:

🔍 Find Customer   🔄 Reset Form

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Receivables Solution

1 Navigation

Click on 'Single' followed by 'Schedule'

HOME	SINGLE	MULTI	INTERNET	ADMIN	CONFIG	SUPPORT

Single Payment

Register

Schedule
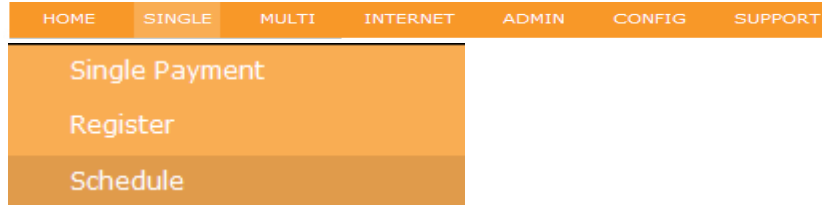
2

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'**

3 Screenshots

Figure 1

Figure 2

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**.
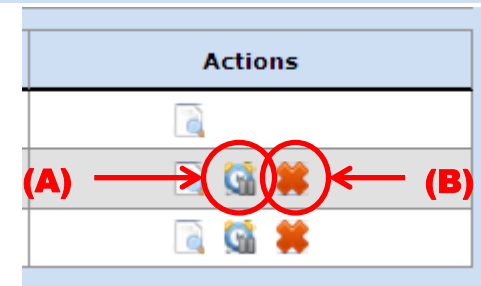3. Once complete, click on **'Schedule Payment'**.

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.

MULTI (Batch Payment)

1 Navigation

Click on 'MULTI' then 'Batch Payment'

HOME	SINGLE	MULTI	INTERNET	ADMIN	CONFIG	SUPPORT

Batch Payment
Batch Manager
Data Vault
Recurring Manager
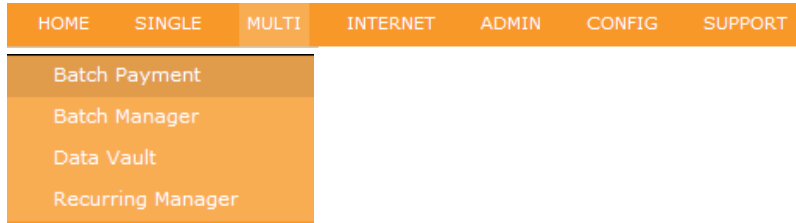
2 Uploading & Processing a batch

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.

3 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"
3. Select the format you require and all results or declined only transactions.
4. Click on the **'Download' (D)** button.

4 Screenshots

Direct Debit from Credit Cards (Batch Payment)

Batch Payment | Batch Manager | Data Vault | Recurring Manager

Upload & Process batch files

File to Upload: [ ] Browse... (A) | Upload & Process (B)

Search & download batch files

Search batch files -
File name: [ ] Batch status: All Time span: Last 45 days

File Name	Status / Actions	Records		Value $		Time submitted (AEST)
		Uploaded	Approved	Uploaded	Approved	
abc.txt		2	2	100.00	100.00	05/09/2013 03:30 PM
APTXU271.DAT		3	3	600.00	600.00	03/09/2013 04:33 PM
Kellie.txt		3	3	6.00	6.00	29/08/2013 02:13 PM

Upload options

- Please click 'Process File' button to confirm processing **CBA Merchant Boarding Form V0_2_JL 15May13.xlsx**
- Please note: clicking 'Process File' button will submit the file for processing and can not be cancelled.
- Please click 'Cancel' if you do not wish to proceed with the submission.

Process options

☑ Process as soon as possible

Cancel | Process File (C)

Select batch file download options

- You are downloading payment results for '**abc.txt**'
- Change options below (if required) and click **Download**.
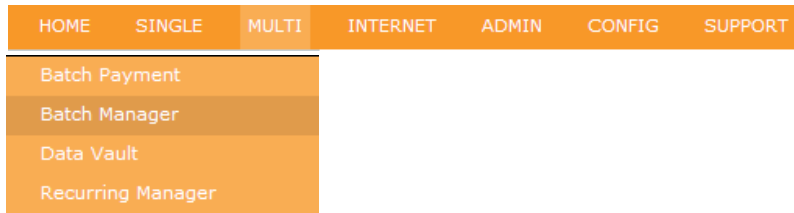- Click **Cancel** if you do not wish to proceed.

Report Format: As Uploaded
Results: All
ZIP Report: No

Cancel | Download (D)

1. Navigation

Click on 'MULTI' followed by 'Batch Payment'

| HOME | SINGLE | MULTI | INTERNET | ADMIN | CONFIG | SUPPORT |

Batch Payment
Batch Manager
Data Vault
Recurring Manager

2. 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.
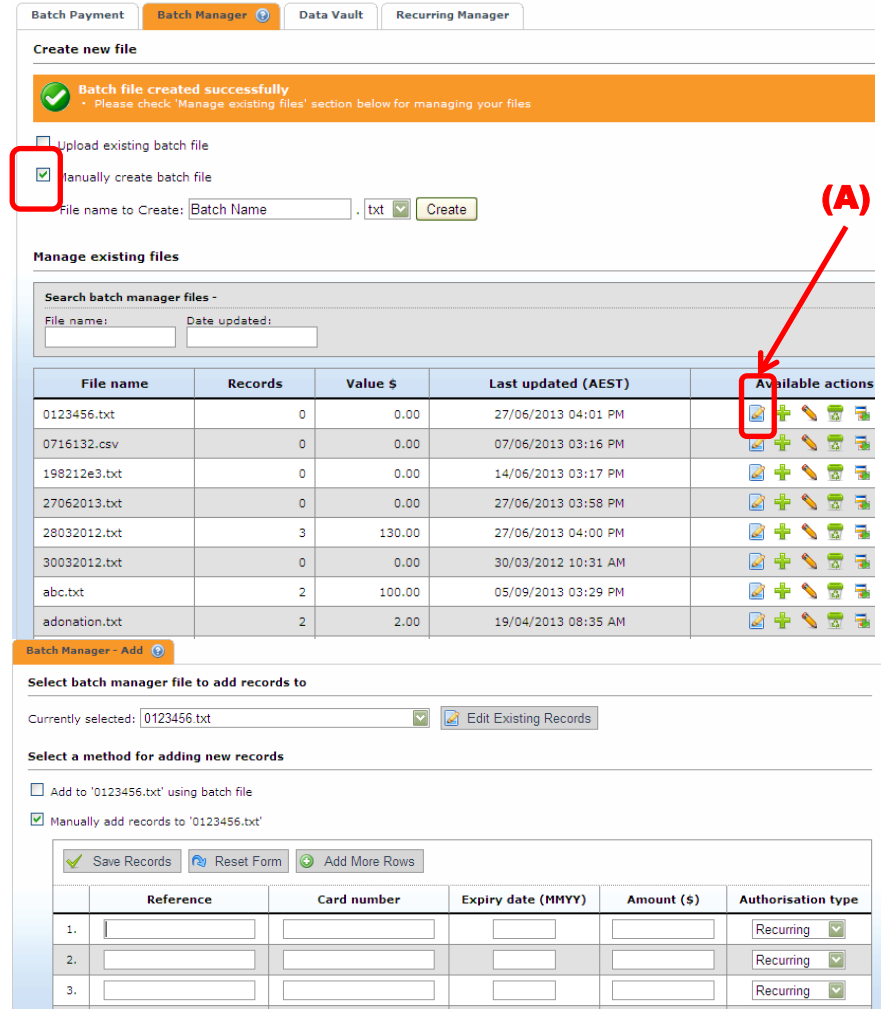7. Click save records

3. 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 | Batch Manager | Data Vault | Recurring Manager |

Create new file

✓ **Batch file created successfully**
· Please check 'Manage existing files' section below for managing your files

☐ Upload existing batch file

☑ Manually create batch file

File name to Create: Batch Name . txt ▼ [Create]

(A)

Manage existing files

Search batch manager files -
File name: _____ Date updated: _____

File name	Records	Value $	Last updated (AEST)	Available actions
0123456.txt	0	0.00	27/06/2013 04:01 PM	
0716132.csv	0	0.00	07/06/2013 03:16 PM	
198212e3.txt	0	0.00	14/06/2013 03:17 PM	
27062013.txt	0	0.00	27/06/2013 03:58 PM	
28032012.txt	3	130.00	27/06/2013 04:00 PM	
30032012.txt	0	0.00	30/03/2012 10:31 AM	
abc.txt	2	100.00	05/09/2013 03:29 PM	
adonation.txt	2	2.00	19/04/2013 08:35 AM	

Batch Manager - Add

Select batch manager file to add records to

Currently selected: 0123456.txt ▼ [Edit Existing Records]

Select a method for adding new records

☐ Add to '0123456.txt' using batch file

☑ Manually add records to '0123456.txt'

[Save Records] [Reset Form] [Add More Rows]

	Reference	Card number	Expiry date (MMYY)	Amount ($)	Authorisation type
1.					Recurring ▼
2.					Recurring ▼
3.					Recurring ▼

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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)**.

4 Screenshots

Direct Debit from Credit Cards (Batch Manager)

| Batch Payment | Batch Manager | Data Vault | Recurring Manager |

Create new file

☐ Upload existing batch file

☐ Manually create batch file

(B)

Manage existing files

Search batch manager files -

File name: _____ Date updated: _____

File name	Records	Value $	Last updated (AEST)	Available actions
0123456.txt	0	0.00	27/06/2013 04:01 PM	
0716132.csv	0	0.00	07/06/2013 03:16 PM	
198212e3.txt	0	0.00	14/06/2013 03:17 PM	
27062013.txt	0	0.00	27/06/2013 03:58 PM	

Batch Manager → Edit [28032012.txt]

Batch Manager - Edit

Select batch manager file to edit

Currently selected: 28032012.txt

Search & Edit file

Search batch manager file records -

Reference: ___ Card number: ___ Expiry date: ___ Amount: ___ Authorisation type: ___

(C)

| ❌ Delete Selected | ➕ Add New Records |

	Reference	Card number	Expiry date	Amount $
☐	acctname business orderno	512345...346	0513	20.00
☐	5123456789012346	512345...346	0513	100.00
☐	27062013	512345...346	9900	10.00

(D)

Edit record ✖

- Edit the values below and click **Save Changes** button to update the record.
- Click **Delete Record** button to permanently delete the record.
- Click **Cancel** button to exit without saving.

Edit values below

Reference: acctname business orderno

Card Number: 512345...346

Expiry Date: 0513

Amount $: 20.00

Authorisation Type: Recurring

(E)

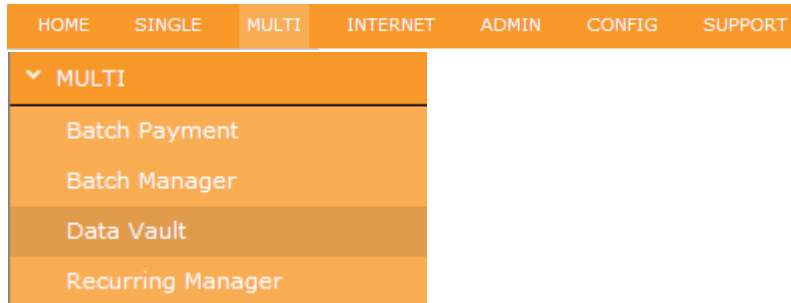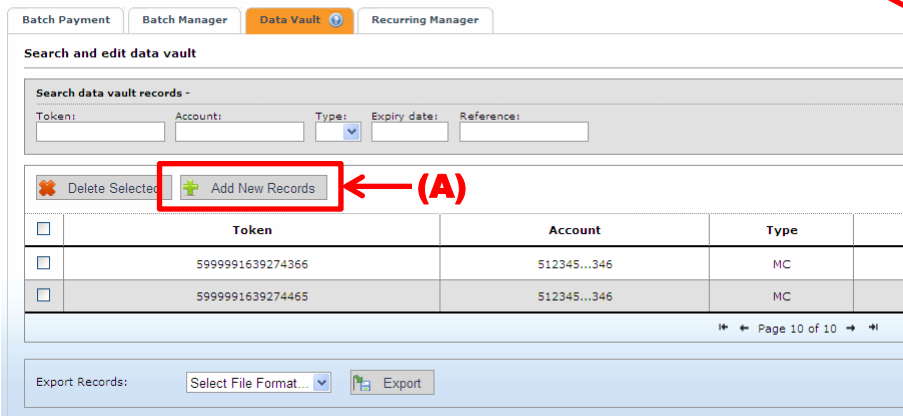| Cancel | Delete Record | Save Changes |

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'**

HOME	SINGLE	MULTI	INTERNET	ADMIN	CONFIG	SUPPORT

- ∨ MULTI
  - Batch Payment
  - Batch Manager
  - Data Vault
  - Recurring Manager

2 **Screenshots**

Secure Card Details (Data Vault)

Batch Payment	Batch Manager	Data Vault 🔍	Recurring Manager

Search and edit data vault

Search data vault records -

Token: | Account: | Type: | Expiry date: | Reference:

❌ Delete Selected	🟢 Add New Records	⬅ **(A)**

☐	Token	Account	Type
☐	5999991639274366	512345...346	MC
☐	5999991639274465	512345...346	MC

Page 10 of 10

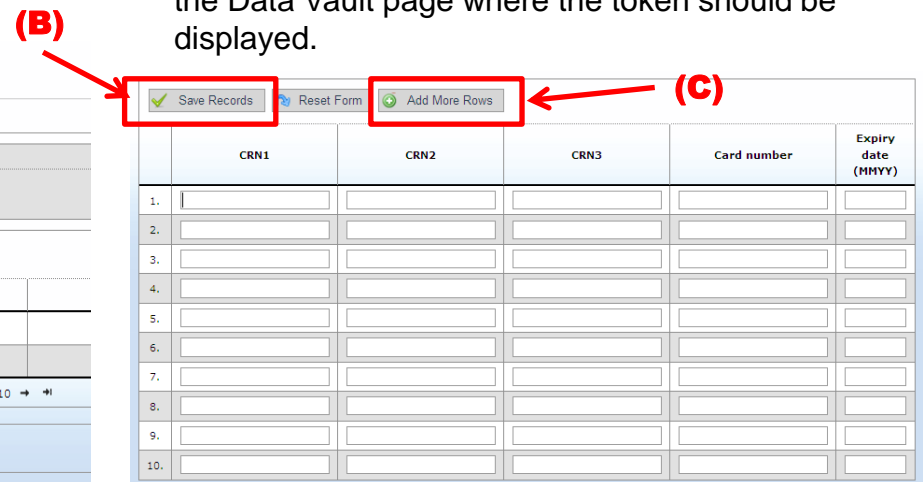Export Records: | Select File Format... | 🔲 Export

3 **How to add a new record**

1. 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.

(B) | **(C)**

✔ Save Records	🔄 Reset Form	🟢 Add More Rows

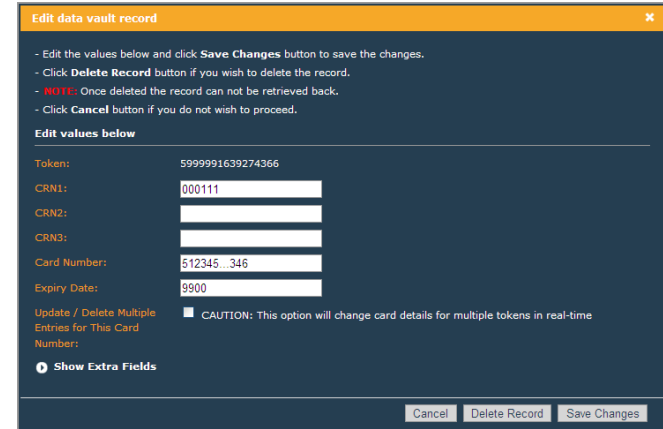|	CRN1	CRN2	CRN3	Card number	Expiry date (MMYY)
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10.					

3

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).**

Figure 1

Recurring Manager - Dashboard

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

1 Click on 'Multi' followed by 'Recurring Manager'

2 Screenshots
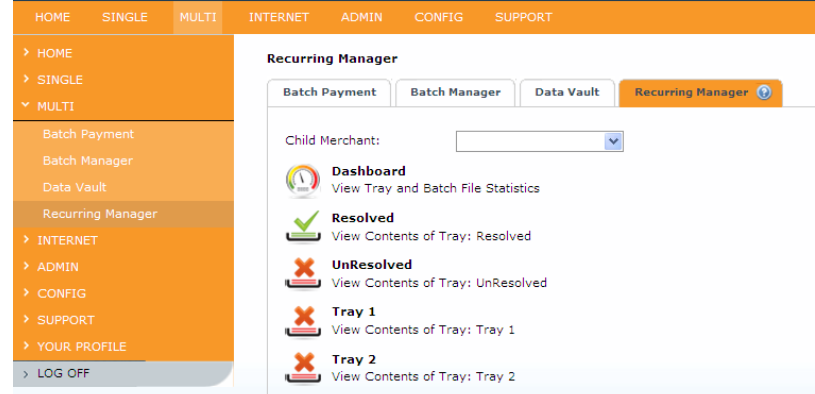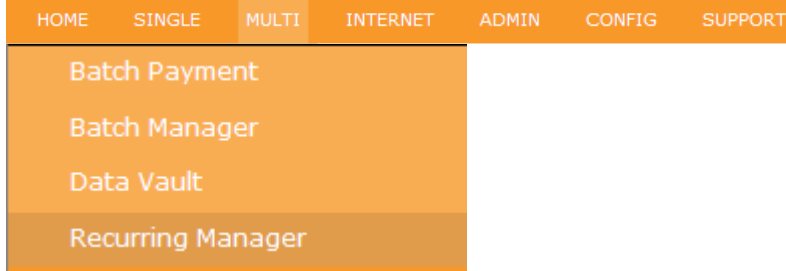
3 Keeping track of your Recurring Manager

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.

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.

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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.

1 ## Navigation

Click on 'Internet' followed by 'Themes'
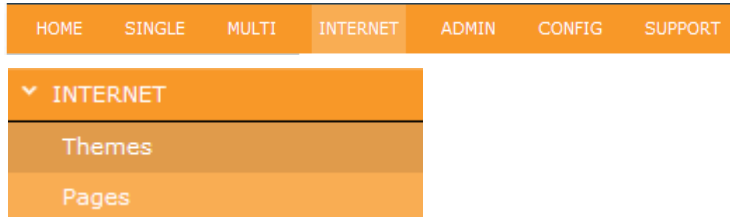
2 ## Screenshots
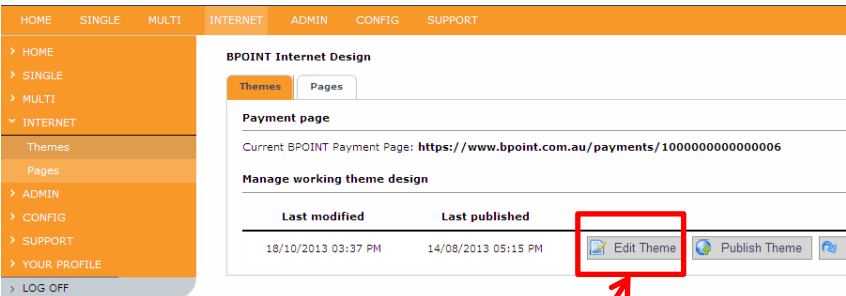
(A)

3 ### How to customise your Payment Page

1. 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.
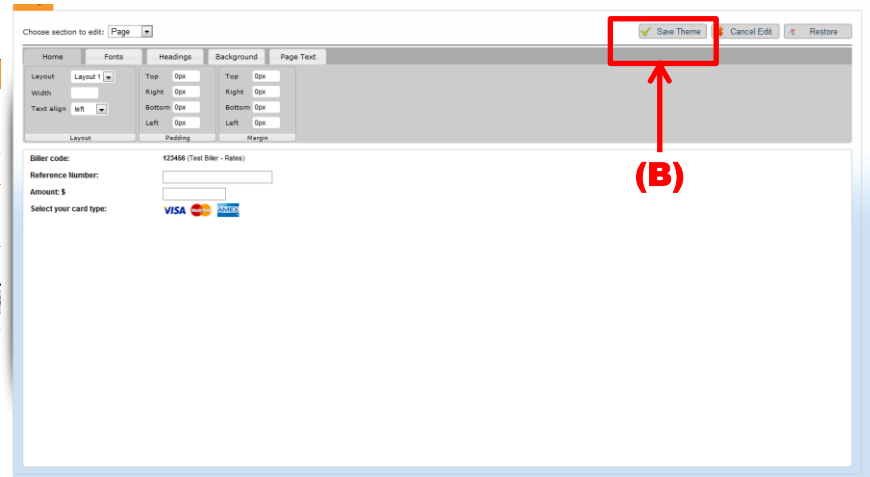
(B)

What is it?

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

1 Navigation

Click on 'Internet' followed by 'Pages'

HOME	SINGLE	MULTI	INTERNET	ADMIN	CONFIG	SUPPORT

Themes

Pages

2 How to edit pages

1. 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

BPOINT Internet Pages

Themes | Pages

Select Page Type: Terms   ← **(A)**

Page Heading: Terms and Conditions

Content:

Update   ← **(B)**

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1 Navigation

Click on 'admin'

HOME   SINGLE   MULTI   INTERNET   ADMIN   CONFIG   SUPPORT

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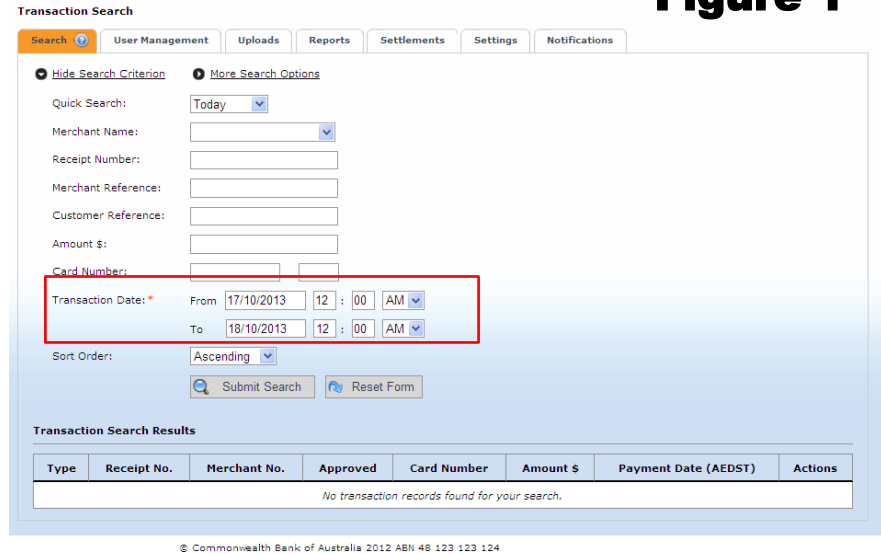
[Note] Entering more information allows you to narrow down the search results.

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.

3 Screenshots

Figure 1

Figure 2

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

Figure 3

Figure 4

BPOINT
Receivables Solution

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

1 Navigation

Click on 'admin' followed by 'user management'

| HOME | SINGLE | MULTI | INTERNET | ADMIN | CONFIG | SUPPORT |

User Management

| Search | User Management | Uploads | Reports | Settlements | Settings | Notifications |

3 Screenshots

User Management

| Search | User Management | Uploads | Reports | Settlements | Settings | Notifications |

Search and manage users

Search users -

User Name: | Email: | Child Merchant:

Add New User | Delete Selected | Reset Password | Deactivate Selected

(A)

	User name	Email address	Permissions	Display name
☐	apiuser	julian.panga@cba.com.au	API	APIUSER
☐	julian	julian.panga@cba.com.au	Manager (T1)	JULIAN PANGA
☐	fotini	michalfo@cba.com.au	Manager (T1)	FOTINI

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

2 ## Adding a New User

Figure 1

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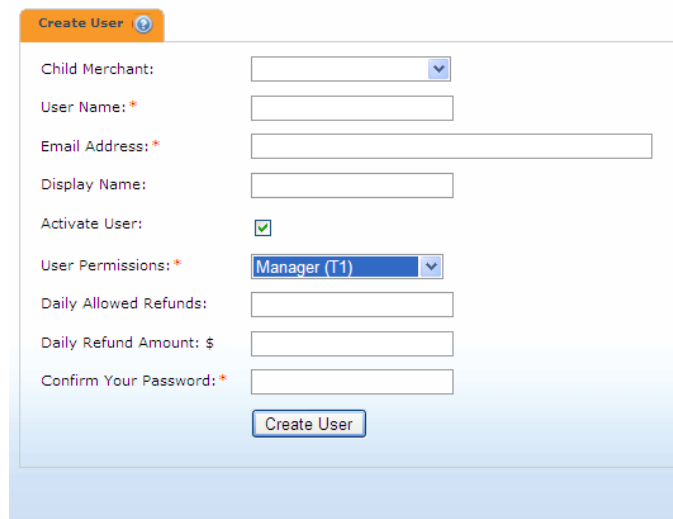
Daily Allowed Refund: Number of successful refund transactions that user will be allowed to perform in one If left blank, no limit will be set for the user.

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.

User Management → Create User

Create User (?)

Field	
Child Merchant:	
User Name: *	
Email Address: *	
Display Name:	
Activate User:	☑
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)	✓	✓	✓	SINGLE/MULTI	✓
Administrator*	✓	✓	✓	SINGLE/MULTI	✓

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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.
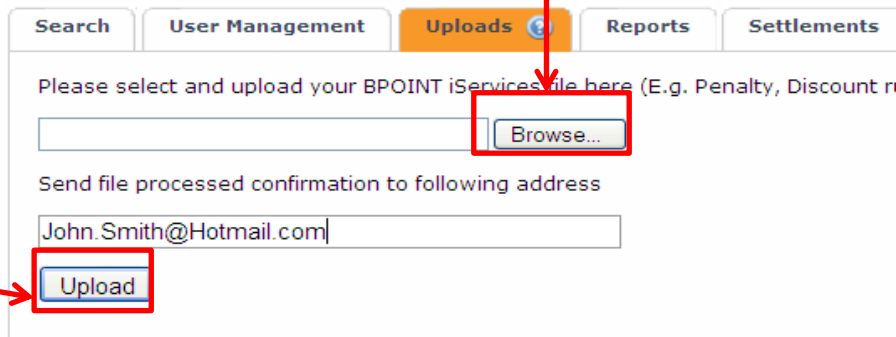
1 ## Navigation
Click on 'Admin' followed by 'Uploads'

HOME	SINGLE	MULTI	INTERNET	ADMIN	CONFIG	SUPPORT

Transaction Search
User Management
Uploads
Reports
Settlements
eForms
Settings
Notifications

2 ## Screenshots

(A)
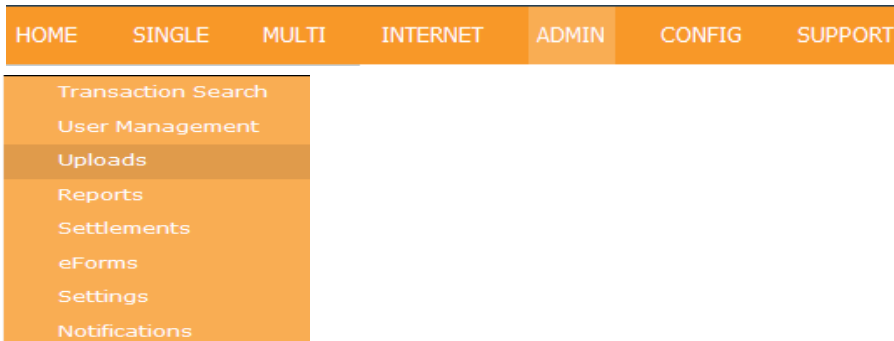
CRN File Uploads

Search	User Management	Uploads	Reports	Settlements

Please select and upload your BPOINT iServices file here (E.g. Penalty, Discount r

[   ] Browse...

Send file processed confirmation to following address

[John.Smith@Hotmail.com]

(B) → Upload

3 ### How to upload

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.

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Receivables Solution

What is it?

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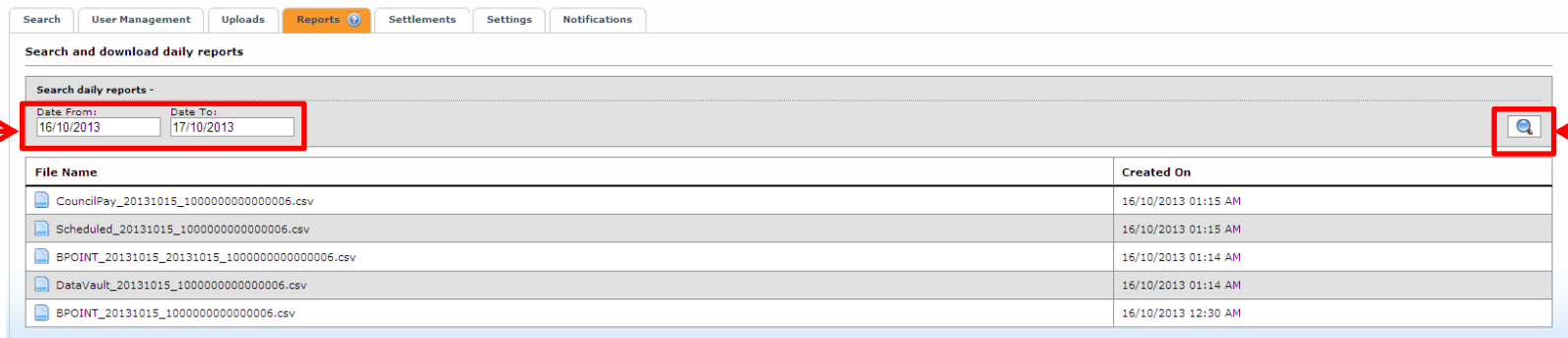
1 ## Navigation

Click on 'admin' button followed by 'Reports'

| HOME | SINGLE | MULTI | INTERNET | ADMIN | CONFIG | SUPPORT |

- ˅ ADMIN
- Transaction Search
- User Management
- Uploads
- Reports
- Settlements
- Settings
- Notifications

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 (comma-separated values) format.

3. To download the file, click on the file name.

3

Daily Reports

| Search | User Management | Uploads | Reports ⑨ | Settlements | Settings | Notifications |

Search and download daily reports

Search daily reports -

| Date From: | Date To: |
| 16/10/2013 | 17/10/2013 |

(A) → **(B)**

File Name	Created On
CouncilPay_20131015_1000000000000006.csv	16/10/2013 01:15 AM
Scheduled_20131015_1000000000000006.csv	16/10/2013 01:15 AM
BPOINT_20131015_20131015_1000000000000006.csv	16/10/2013 01:14 AM
DataVault_20131015_1000000000000006.csv	16/10/2013 01:14 AM
BPOINT_20131015_1000000000000006.csv	16/10/2013 12:30 AM

What is it?
Settlement reports matches what the merchant receives in their bank account as a settlement*

1 **Navigation**

Click on 'admin' followed by 'Settlements'

HOME	SINGLE	MULTI	INTERNET	ADMIN	CONFIG	SUPPORT
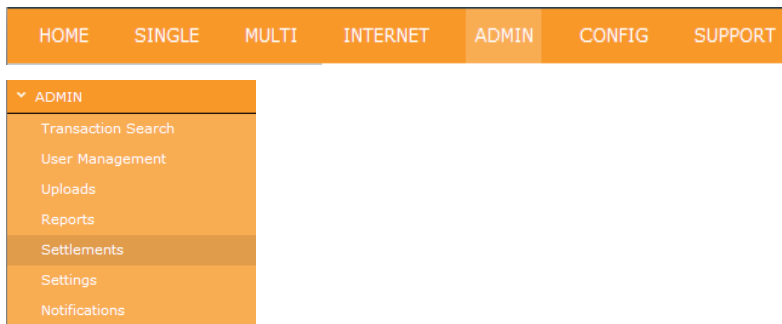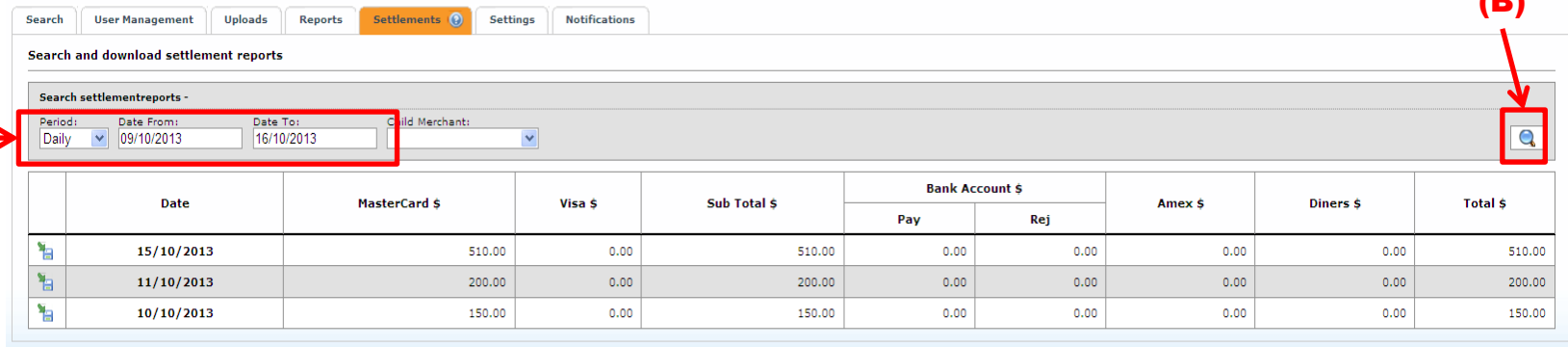
- ADMIN
  - Transaction Search
  - User Management
  - Uploads
  - Reports
  - Settlements
  - Settings
  - Notifications

2 **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

3 **Screenshots**

Settlements

Search	User Management	Uploads	Reports	Settlements ⓘ	Settings	Notifications

Search and download settlement reports

Search settlementreports -

(B)

(A) → Period: Daily Date From: 09/10/2013 Date To: 16/10/2013 Child Merchant: 🔍

	Date	MasterCard $	Visa $	Sub Total $	Bank Account $		Amex $	Diners $	Total $
					Pay	Rej			
	15/10/2013	510.00	0.00	510.00	0.00	0.00	0.00	0.00	510.00
	11/10/2013	200.00	0.00	200.00	0.00	0.00	0.00	0.00	200.00
	10/10/2013	150.00	0.00	150.00	0.00	0.00	0.00	0.00	150.00

Settings – Receipt Customisation

BPOINT®
Receivables Solution

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'

HOME	SINGLE	MULTI	INTERNET	ADMIN	CONFIG	SUPPORT

ADMIN
- Transaction Search
- User Management
- Uploads
- Reports
- Settlements
- Settings
- Notifications
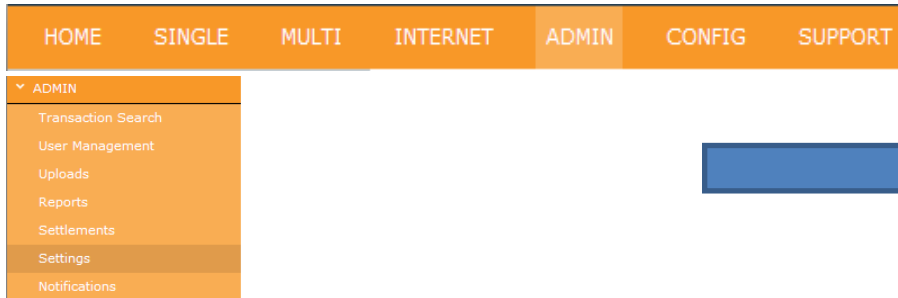
2

Back Office Settings

| Search | User Management | Uploads | Reports | Settlements | Settings | Notifications |

Merchant Receipt Details

Trading Name:	Joe's Plumbing
ABN:	48123123124
ACN:	
Address Line 1:	25 Bourke St
Address Line 2:	
Suburb:	Melbourne
State:	VIC
Postcode:	3000
Phone Number:	03 9375 8874
Fax Number:	
URL:	www.joesplumbing.com.au
Email Address:	kien.luu@cba.com.au
Receipt Message:	Thanks for calling Joes Plumbing

Upload Backoffice Logo: [   ] Browse...
[Update]

BPOINT Payment Receipt

Joe's Plumbing
ABN: 48 123 123 124
25 Bourke St
Melbourne, VIC, 3000
Phone: 03 9375 8874
Web: www.joesplumbing.com.au
Email: kien.luu@cba.com.au

Payment Details -

You Have Paid: TEST BPOINT Test 6
Customer Reference 1: 654321
Customer Reference 2:
Customer Reference 3:
Merchant Reference:
Source: eCommerce
Payment Amount $:   50.00
Card Number: 512345...346
Expiry Date: 9900

Authorisation Result - Approved

Payment Date: 16/10/2013 3:10 PM AEDST
Receipt Number: 37793074207

Thanks for calling Joes Plumbing

© Commonwealth Bank of Australia 2011 ABN 48 123 123 124

3 ### How to customise your receipt

1. Enter the details of the business under merchant receipt details (note: the back office logo is a separate function that does not apply to the receipt)

2. Once complete, click on '**update'**. You can also test how the receipt looks by submitting a test transaction.

1 Navigation

Click on 'ADMIN' tab, then notifications

| HOME | SINGLE | MULTI | INTERNET | ADMIN | CONFIG | SUPPORT |

- Transaction Search
- User Management
- Uploads
- Reports
- Settlements
- Settings
- Notifications
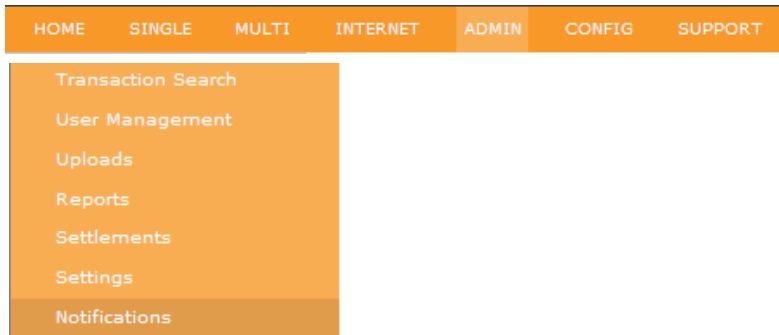
2 Screenshots

Set up a new notifications contact

Notifications

| Search | User Management | Uploads | Reports | Settlements | Settings | Notifications |

System Notifications

Name	Email	Actions
Jane Smith	janesmith@company.com.au	
John Tester	johntester@company.com.au	

Add New Contact

Notification Details

Add Notification Contact

Name:

Email:

Enabled: ☑

Save Close

(A)

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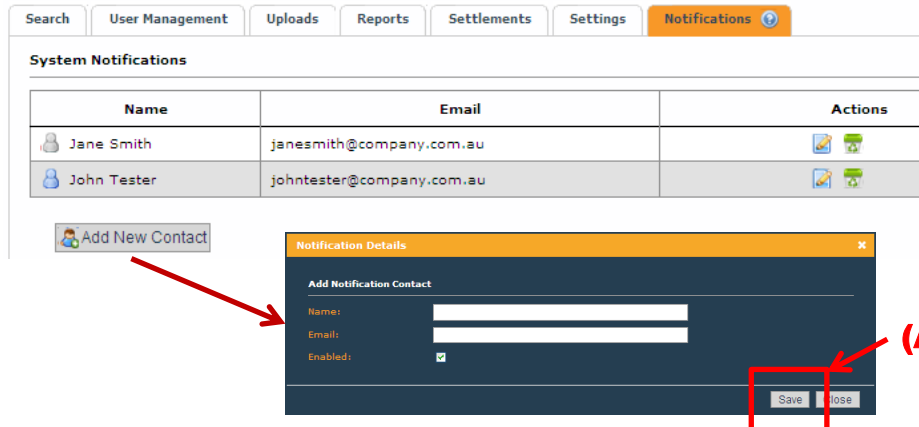
1. To **Add** a new email recipient: click on Add New Contact

   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 ## Navigation

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

3 ## Screenshots

Figure 1
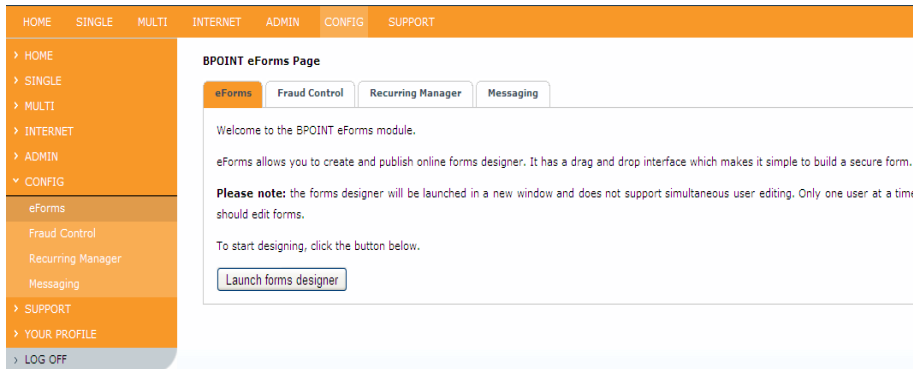
2 ### Create a new eForm

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
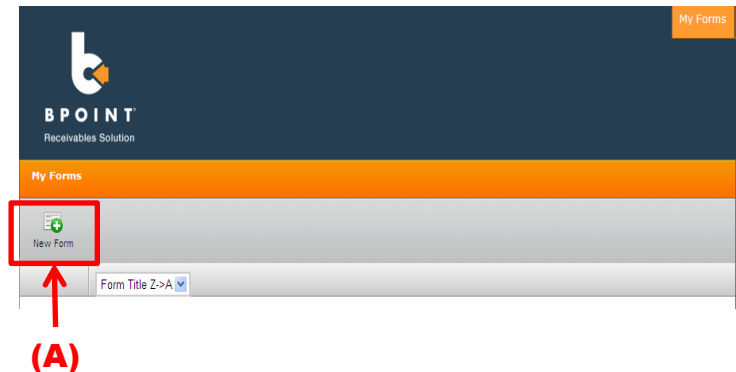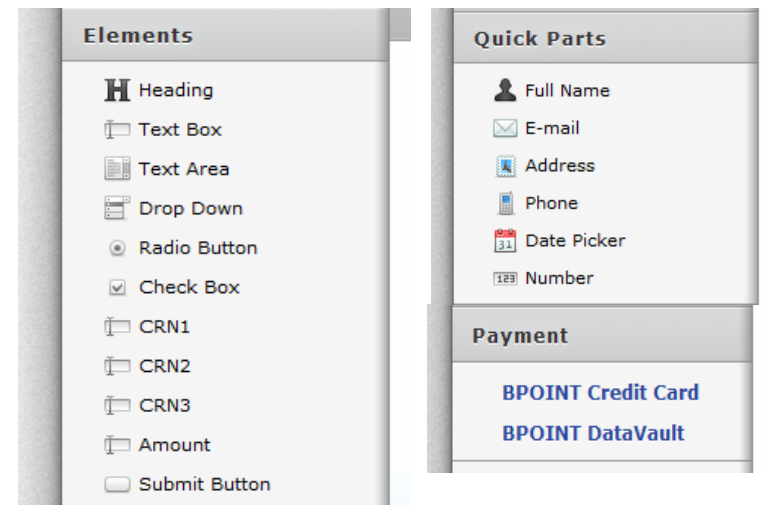
2   BPOINT Payment page

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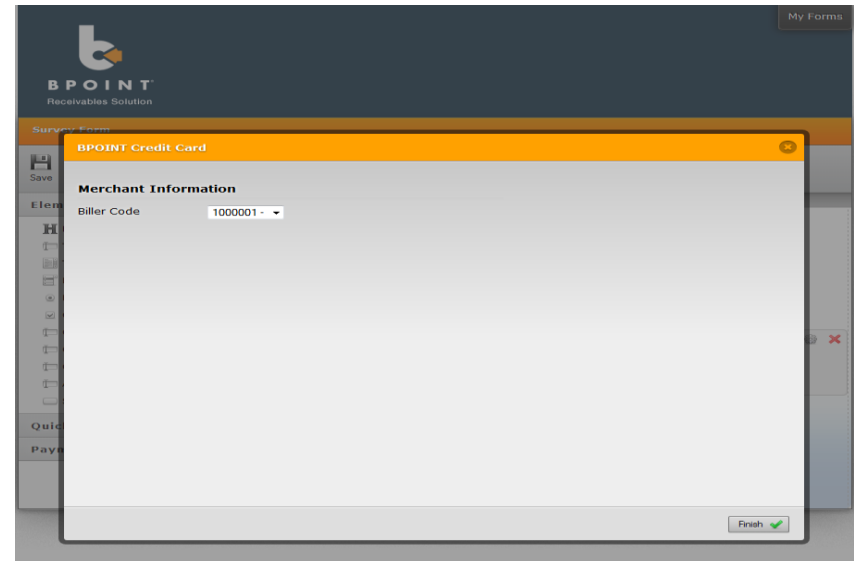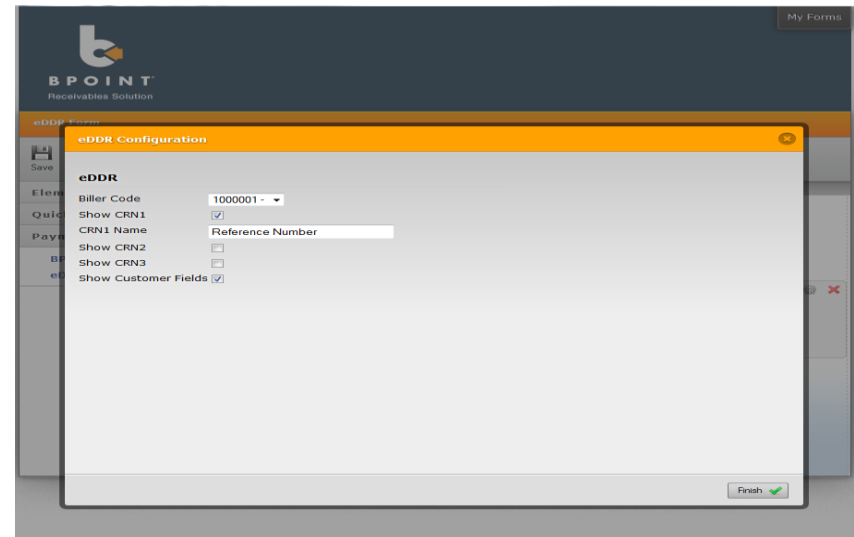
BPOINT eDDR is used to register either a Credit Card or a Bank Account for recurring payments.

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

Delete – remove the selected form

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
Click on 'Config' followed by 'Fraud Control'

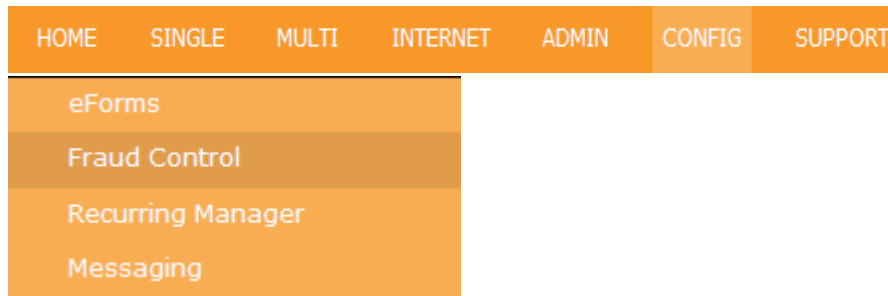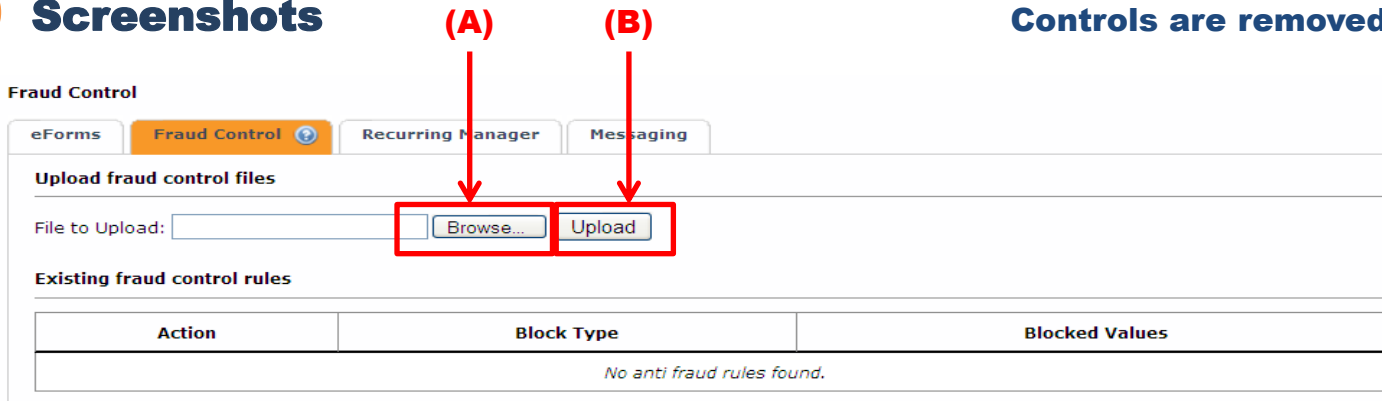| HOME	SINGLE	MULTI	INTERNET	ADMIN	CONFIG	SUPPORT

- eForms
- Fraud Control
- Recurring Manager
- Messaging

2 ## Screenshots

(A)   **(B)**

Fraud Control

eForms	Fraud Control ❓	Recurring Manager	Messaging

Upload fraud control files

File to Upload: [   ] [Browse...] [Upload]

Existing fraud control rules

Action	Block Type	Blocked Values
	No anti fraud rules found.	

3 ### How to set up Fraud Controls

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.**

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.

① Navigation

Click on 'Config' followed by 'Recurring Manager'
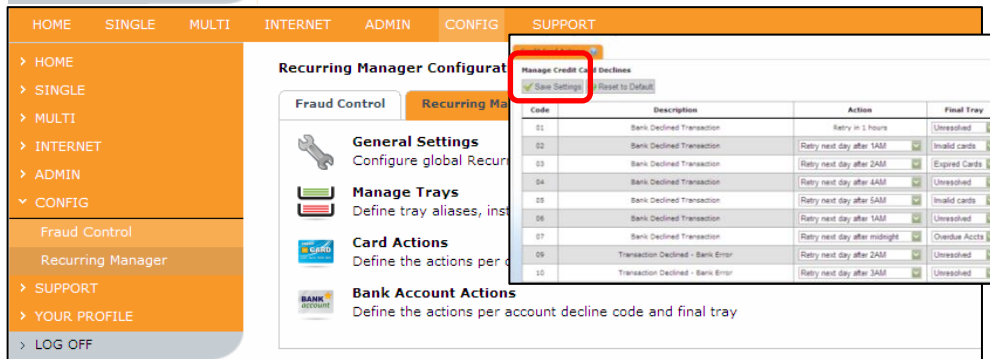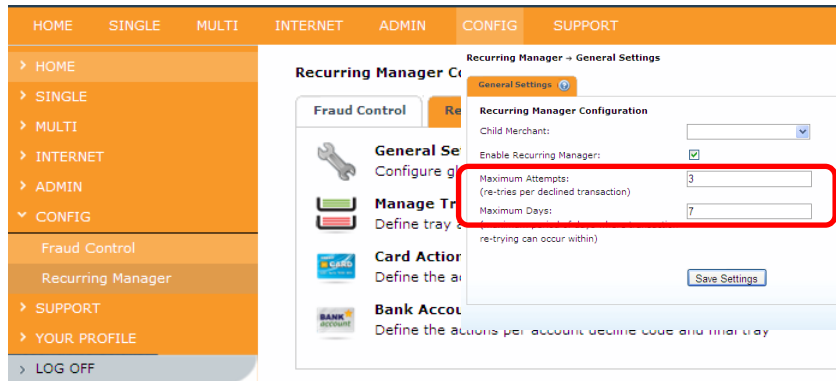
② Setting up Recurring Manager

1. 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