Quick Start Guide

Payrix Integrated - Payment Portal

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INTRODUCITON

Introduction

Connect to the LinksPay console from the link contained in your welcoming email. The web address is https://console.linkspay.com.au/Test/

Enter your Username and password from the email your received.

Once you have successfully logged in you will see the Business Snapshot screen, this is your home page.

You should change your password at this point. Please click on Change Password at the top right hand corner of the page. Your new password will require 10 characters of which 2 must be non-alphanumeric.

Home Page

The home page consists of 5 point and click menus located on the black

taskbar. These menu items will be explained further in this document.

The five menu items are Home, Business Details, Payers, Reports, Realtime Transaction

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HOME PAGE

Your home page provides you with a business overview of interaction with Links pay. There are 5 Heads which you should familiarise yourself with. These are

1. Recent Settlements

This represents the last 3 payments made to your business account

2. Past Income

This represents the last 7 months income calculated by month from your payers

3. Recent Communication / Upcoming Debits

Recent communication is the last 5 emails we have sent to you and will include Processing Tax Invoices and rejection reports.

Upcoming Debits is the total value of all debits on each day for the next 5 business days

4. Payer Status Summary

This provides you with a summary of Active members or customers, those that have been cancelled and those that have been suspended.

5. Payer Status Counts

Whilst similar to the Payer Status Summary, Payer Status Counts provides you with a more detailed view of members or customers. You should review this regularly as you may be foregoing income from suspended accounts which you may be able to simple rectify.

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BUSINESS DETAILS

Business Details provides you detailed information relative to the business, transactions, communications and logs. The information provided comes from 6 subheadings, being View Details, Transactions, Emails, Users/Staff, Audit and Interaction Log.

1. View Details

The information provided on this screen is unable to be changed without written notification form an authorised representative of your business. The information shown has been taken from the application form and agreement that was completed upon establishing the service.

2. Transactions

Transactions will provide with a history of transactions, a detailed ledger of transactions and the fees charged on debits.

You will be required to determine the type of transactions you wish to report on and select a date range.

3. Emails

This is a log of all emails we have sent to you.

4. Users/Staff

Upon opening this screen you will see a list of valid usernames and the roles assigned to them.

You may create a new user or modify an existing user if you have valid assignment rights.

a. Add New User

Click on the icon and complete the required information

Items you should consider here are

i. Restrict access to payer details – which will not allow the user to view bank account or credit card information

ii.Website Access – You will need to determine the information you would like this user to view or edit. All items are defaulted to inactive and you will need to select an item to activate the function.

BUSINESS DETAILS

iii. Business Edit – Allows the user to edit business information

iv. Business View – Allows the user to view business information

v. Email – Allows the user to receive and view emails

vi. Inventory – NFI

vii.Payer Edit – Allows the user to edit payer information

viii.   Payer View – Allows the user to view payer information

ix. Reports – Allows the user to generate reports

x. Transactions – Allows the user to enter a real time transaction

xi. Users – Allows this user to create additional users and modify and cancel existing users

b. Modify Existing User

Click on the username that you wish to edit. You may make any changes that you require along with resetting the user password.

5. Audit

The audit log shows a complete list of changes that have taken place within your account. It also indicates the date, time and who completed the change.

6. Integration Log

The log of web service communications.

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PAYERS

Payers are your clients, customers or members of your business.

At this point you are able to add new payers or search and modify existing

payers. **1. Add New Payer**

Once select a new Payer ID will be automatically generated. This is a unique number for the Integrapay system and identifies a particular payer throughout our system.

Unique Internal ID is the identifier that you wish to allocate to your payer.

You will need to complete the information required to create a new payer. The system will advise of required fields and information.

a. Debit Schedule

i. Standard Debit Amount

The amount of the debit

ii. Schedule Type

Manual – you will manually enter each required debit

Unending – Debits will continue at the frequency and amount

selected

Limited by Debit Count – Debits will continue until a set number of debits have been reached

Limited by Debit Count – Debits will continue until a set total value has been reached

iii. Schedule Frequency

The period each debit will occur

Weekly & Fortnightly will require a day to be selected

Monthly will require a date to be selected

Quarterly, Half Yearly and Yearly will calculate from the Contract Start Date

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PAYERS

Once you have entered the required information click on SAVE.

Ensure you review the Current Schedule to verify the information you have entered

Please verify that that the Payment Status is Active, any incorrect information may suspend the debit transaction.

b. Edit Details

You may edit some of the information you have previously entered. Once completed click SAVE.

c. Edit Payments

This will allow you to edit the transactions, add or delete transactions, modify the amount or period and change the Status of a payers account

d. Transactions

This is a list of transactions completed for this payer

e. Communication

This will allow you to enter notes relative to this payer

f. Auditing

This is a list of all changes to this payer including the date, time and user who made the change

Payer Search

Enter in the information you have to search for a payer then click search. If there are multiple payers that meet the entered criteria then you will be presented with a list. To select the desired payer simply click on their unique identifier which appears in blue.

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REPORTS

In this menu, you are able to generate and view reports. You should review your reports on a daily basis.

From the drop down menu select the required report, enter the require parameters and click Load Report.

Real Time Transactions

A real time transaction allows you to process a credit card payment in real time. Please complete the required fields and click on process transaction.

You are also able to search real time transactions based on a date range.