



# WESTPAC GET PAID<sup>®</sup> GUIDE

How to set up and use  
Virtual Terminal and Pay by Link.

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## Get Paid®

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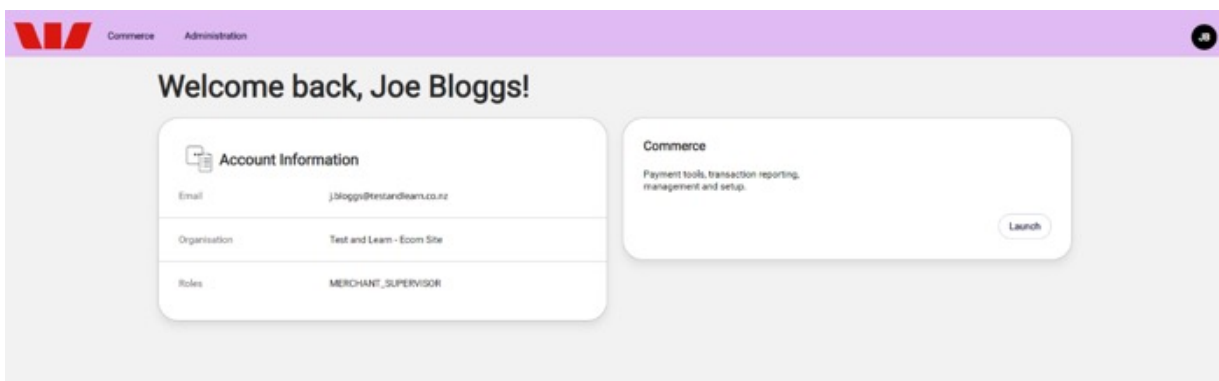
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# Get started

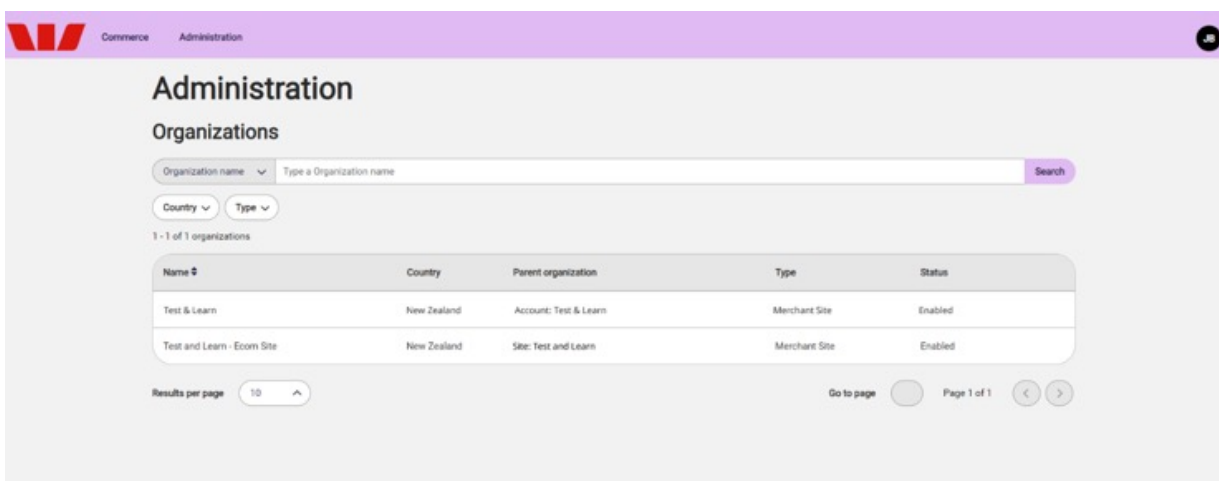
## 1. Set up your Westpac Get Paid account

- When you become an approved user, you'll receive a confirmation email from [noreply@getpaid.westpac.co.nz](mailto:noreply@getpaid.westpac.co.nz) with a link to set your password (check your junk or spam folders if you don't receive the email)
- Follow the instructions to complete your account setup
- Once you're set up, you can access the Westpac Get Paid portal any time at [westpac.nz.verifone.cloud](https://westpac.nz.verifone.cloud).



## 2. Create a secure card capture key

- Log into your Westpac Get Paid account
- Go to **Administration** > **Account Setup** > **Organisation Company and Sites**
- Select your organisation from the dropdown menu – this starts with the word 'Account' and is followed by your organisation's name i.e., Account: Westpac New Zealand



- Scroll down and select **Secure card capture**.

Key alias	Created date
K1585	May 9, 2023 at 13:03:04

Create new public key

- Select **Create new public key**.

### 3. Get access

- You can now access Virtual Terminal or Pay by Link if you have the correct permissions
- Select **Commerce**, then **Virtual Terminal** or **Pay by Link** to get started.

## Get Paid<sup>®</sup>

### Process payments through Virtual Terminal.

- Log into the Westpac Get Paid portal
- Go to **Commerce > Payment Tools > Virtual Terminal**
- Enter the following details:
  - **Transaction Amount**
  - **Merchant Reference** (optional)
  - **Transaction Description** (optional)
  - **Promo Code** (optional)
- Select **Continue to Payment**

Commerce Administration

### Commerce

#### Virtual Terminal

Payment Settings | Payment Form | Payment status

**Payment Settings**

Payment Provider Contract: A/NZ Test - MAIL

Transaction type: Sale

Amount: NZD 0.00

Merchant Reference (Optional):

Transaction Description (Optional):

Promo Code (Optional):

Continue to Payment

- Enter the following card details:
  - card number
  - card expiration date
  - CVV
- Select **Pay** to complete the transaction

The screenshot shows the 'Commerce' interface with a purple header bar containing the logo and navigation links 'Commerce' and 'Administration'. A user profile icon 'JB' is in the top right. The main content area is titled 'Virtual Terminal' and features a progress bar with three steps: 'Payment Settings', 'Payment Form' (the current step), and 'Payment status'. Below the progress bar is a 'Payment Form' card. It displays 'Transaction amount' as 'NZD 10.00' and 'Merchant Reference' as 'Test1234'. A section titled 'Pay with card' contains input fields for 'Card number' (with the value '4000 0000 0000 0002' and a 'VISA' logo), 'Expiration date' (with the value '03/25'), and 'CVV'. A large purple button labeled 'Pay \$10.00' is at the bottom of the form. Below the button, it says 'Secure payments provided by' followed by the 'Verifone' logo. A 'Back' link is located at the bottom left of the form card.

- A confirmation screen will display the transaction result.

The screenshot shows the 'Commerce' interface with the same purple header bar. The 'Virtual Terminal' section now displays a confirmation screen. The progress bar shows 'Payment Settings', 'Payment Form', and 'Payment status' (the current step). The confirmation card features a green checkmark icon and the text 'Transaction Processed'. Below this is a 'More Details' button. A table lists the transaction details:

Transaction Type	Sale
Organization	Test and Learn - Ecom Site
Merchant Reference	Test1234
Amount	NZD 10.00
Card Number	400000****0002
Date and Time	8/31/2023, 14:05:56

At the bottom of the confirmation card is a purple button labeled 'New transaction'.

## Refunds.

- Log into the Westpac Get Paid Portal
- Go to **Commerce > Reporting > Transactions**
- Select the transaction you want to refund
- Select **Actions**
- Select **Refund**
- Enter the amount you want to refund
- Enter the refund reason (optional)
- Select **Refund.**

## Process payments through Pay by Link.

To generate a payment link:

- Log into the Westpac Get Paid portal
- Go to **Commerce > Payment Tools > Pay by Link**
- Select **Create Payment Link**

The screenshot displays the 'Commerce Administration' interface for 'Payment links'. It includes a search bar, filters for date range, organizations, and payment status. The table below the filters is empty, indicating no payment links are currently found. The pagination shows 'Page 1 of 1' and 'Results per page' set to 10.

- Choose payment settings:
  - **Cart information** type. If you select **Amount**, you only need to enter a Transaction Amount for the payment link. If you select **Amount & product** you will need to fill in product information, unit quantities and amount per unit. Click **Add Product** to add additional line items. The total price will be calculated based on quantity and the products and quantities will be visible on the payment page
  - Select the Payment Method allowed for this particular transaction. If there is only one payment method, this field will pre-select. If available, you can select multiple payment methods
  - **Customer details** including billing and shipping details

Commerce Administration

## Commerce

Payment links

### Create Payment link

Payment Settings Link settings Done

#### Payment Settings

Cart information

☒ Amount ☐ Amount & product

Transaction Amount

NZD 0.00

Merchant Reference (optional)

Invoice Number (optional)

Sales Identifier (optional)

#### Payment method for NZD

card

Payment Contract

Mastercard, Visa

☐ Enable 3-D Secure authentication

#### Customer details

First Name

Last Name

Phone Number (optional)

+1 Example (201) 555-0123

Will be shared with payment providers for processing

Email Address

Needed to authenticate the customer for

#### Billing Address

Address Line 1

#### Billing Address

Address Line 1

Address Line 2 (optional)

Zip Code City

Country

Province/State (optional)

☐ The shipping address is the same as the billing address

Discard Continue to link settings

- Choose your link settings:
  - Link Expiration** the maximum is 30 days from the time you created the link
  - Language** to set the language used on your payment page (optional)
  - Checkout theme** (optional) to personalise the Pay by Link checkout page. You can choose a default theme, or a customised theme created by the **Checkout Themes** editor.
- Select the **Send link by email** box to automatically send the payment link to your customer by email and/or
- Select the **Send link by phone number** box to automatically send the payment link to your customer by SMS
- Once the payment link is created, you can also copy and send it manually

Commerce Administration

## Commerce

< Payment links

### Create Payment link

Payment settings Link settings Done

Payment settings summary NZD 10.00

#### Link settings

Link expiration

1 days (30 days maximum)

Preselected language

English

Checkout theme

Westpac

#### Delivery settings

☐ Send link by email

☐ Send link by phone number

Back to payment settings Discard Create payment link

- Select **Create payment link**.

Commerce Administration

## Commerce

< Payment links

### Create Payment link

Payment settings Link settings Done

Payment link was successfully created

https://cst.checkout.vfcloud.net/v2/checkout/d5dabad1-c8f8-4989-aa... Copy link

Expires on 1 Sep 2023 13:55

Send payment link

#### Link details

Organization	Test and Learn - Ecom Site
Transaction amount	NZD 10
Merchant Reference	Test1234
Product(s)	-
Customer name	Joe Bloggs

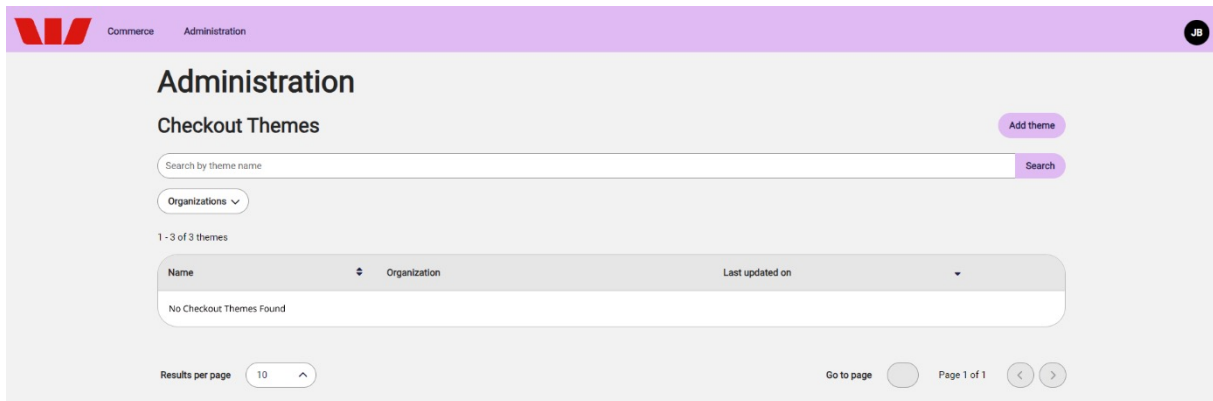
Return to payment links

## Customise your Pay by Link payment page.

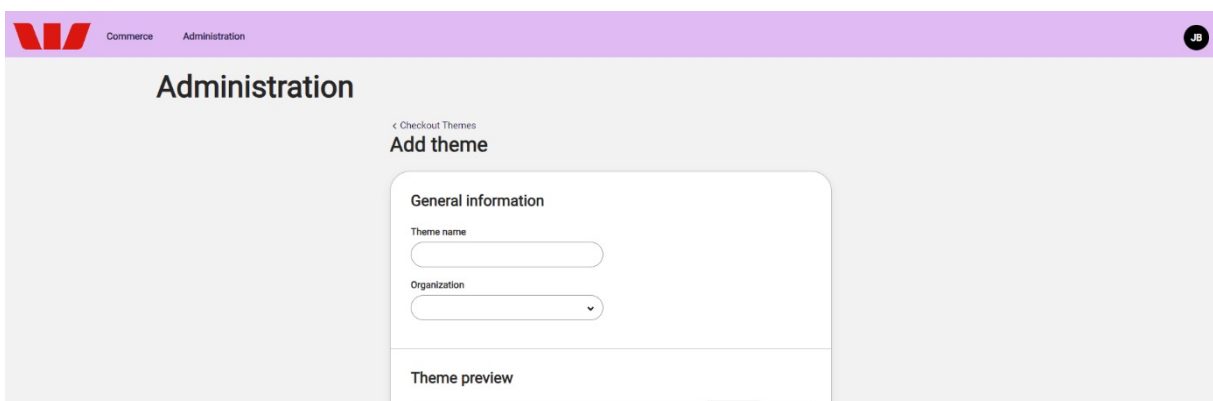
You have the option to customise your Pay by Link payment pages with your logo, brand colours and fonts:

- Go to **Administration > Advanced Settings > Checkout Themes**
- Select **Add theme**





- Fill in the **Theme Name** field e.g., 'Pay by Link page'



- Select your **Organisation**. Click the Organisation dropdown arrows to select the option below your organisation starting with 'Site:'
- Select **Save theme**
- Select **Customise theme**. You can upload a logo or image, change the background colour of the page, the checkout frame and the button and change the page fonts.
- Select **Apply changes**
- Select **Return to theme page**
- Select **Save theme**. Your new theme is now available to select under **Theme** when creating a new payment link or setting up a hosted payment page for your website.

## Manage Pay by Link transactions.

**Commerce**

**Payment links**

Type a Merchant Reference

8/24/2023 – 8/31/2023 Organizations Payment status Clear filter

Total: 3 Payment links

Created	Amount	Email	Merchant Reference	Status
8/31/2023, 13:55:57	10.00 NZD	-	Test1234	Not paid
8/31/2023, 11:46:45	10.00 NZD	-	-	Paid
8/31/2023, 11:40:54	10.00 NZD	-	-	Paid

Results per page 10 Go to page

**10.00 NZD Not paid**

Payment link Customer Actions

**History**

History is not available

**Link URL**

https://cst.checkout.vfcloud.net/v2/checkout/d6dabed1-c8f8-4989-aabf-f930e8dc6534/view

**Copy link**

**Link created**

31 Aug 2023 13:55

**Link expiration**

1 Sep 2023 13:55

**Organization**

Test and Learn - Ecom Site

**Payment Methods**

MASTERCARD, VISA, AMEX, JCB, UPI

**Transaction Amount**

10.00 NZD

- Go to **Commerce > Payment Tools > Pay by Link**
- Select a transaction
- Select **Actions** to:
  - **Re-enable link** if the link is expired by extending the availability by 24 hours
  - **Copy link** if the transaction was not paid
  - **Disable link** if the transaction will not be paid
  - **View transaction details** if the transaction was paid. If the transaction failed three times, you must create a new payment link.
- Select **View Transaction Details** to view:
  - Transaction status: Not paid / Paid / Failed / Expired
  - Link history
  - Payment link URL
  - Link creation and expiration date
  - Organisation name
  - Payment methods
  - Transaction amount
  - Customer details

## Additional Pay by Link reporting.

The Payment Link history allows you to view whether your customer has used the link and made a payment, and the outcome of the transaction.

If the payment failed or has expired, you can Re-enable the link. If the payment was completed successfully, you can View Transaction Details.

## Refunds.

- Log into the Westpac Get Paid Portal
- Go to **Commerce > Payment Tools > Pay by Link**
- Select the transaction you want to refund
- Select **Actions**
- Select **Refund**
- Enter the amount you want to refund
- Enter the refund reason (optional)
- Select **Refund**


**10.00 NZD** Paid

Payment link	Customer	Actions
<b>History</b>  Transaction Successful 31 Aug 2023 11:41  Checkout initiated a pay request 31 Aug 2023 11:41		
<b>Link URL Expired</b> <a href="https://est.checkout.vfieloud.net/v2/checkout/2256edfb-5f78-47d8-8859-ffa6ef5bde50/view">https://est.checkout.vfieloud.net/v2/checkout/2256edfb-5f78-47d8-8859-ffa6ef5bde50/view</a>  Transaction ID: b88d0825-270c-4961-94d2-553ddae86b61 Customer has already paid using this link.  <a href="#">View Transaction Details</a>		
<b>Link created</b> 31 Aug 2023 11:40  <b>Link expiration</b> 1 Sep 2023 11:40  <b>Organization</b> Test and Learn - Ecom Site  <b>Payment Methods</b> MASTERCARD, VISA, AMEX, DINERS  <b>Transaction Amount</b> 10.00 NZD		

# Get reporting

## Reports.

You can view the following reports on the **Commerce** tab in the Westpac Get Paid Portal.

**Commerce** Administration

**Commerce**  
Optimize commerce operations with a comprehensive suite of payment tools, designed to streamline transactions and maximize revenue. Stay on top of financial performance with detailed reporting on sales and revenue, and never miss a payment with a reliable payment deliverables.

**Reporting**  
Payments Dashboard  
Transactions  
3D Secure Authentications  
Settlements  
Report Scheduler  
Generated Reports

**Payment Tools**  
Virtual Terminal  
Pay by Link

Roles  
MERCHANT\_SUPERVISOR

- Log in to your Westpac Get Paid account.
- Go to **Commerce > Reporting**
- Select **Payments Dashboard** to view transaction KPIs (Key Performance Indicators) for your organisation(s) in a selected time frame. You can also select a baseline time frame to which you can compare your current data. The report is generated based on all transactions from all your payment channels.

- **Transactions:** Customise and download your own transaction reports and manage your transactions. View all transactions from all your eligible payment channels, including refunds. You can filter transactions by:
  - Date
  - Organisation
  - Merchant ID
  - Transaction details including channel, transaction status, and more
- Select a transaction to see transaction detail and perform actions including refunds.

**Note:** When filtering transactions by channel, Pay by Link transactions are 'E-Commerce' and Virtual Terminal transactions are 'Phone' and/or 'Mail'.




- **3D Secure Authentications:** Review your transactions authenticated with 3D Secure
- **The Generated Reports page** allows you to view and download all generated reports.

## Settlement.



Settlement reporting is currently unavailable for the New Zealand version of Westpac Get Paid.

# We're here to help

## Merchant Assist (for general enquiries)

-  **0800 888 066 Option 2**
-  **[merchant\\_assist@westpac.co.nz](mailto:merchant_assist@westpac.co.nz)**
-  **8.30am to 5pm, Monday to Friday**

## Technical Support

-  **0800 888 066 Option 4**
-  **24 hours, 7 days**

### Disclaimer.

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