

Manage requests

How to guide

Search and view all customer transaction requests and keep track of their status.

Manage requests

Track and follow up requests

Easily find transactions that are unpaid, overdue, paid or refunded and expired or cancelled.

Search for request with ease

Use filters to easily find requests.

Resend or cancel requests

If your customer loses a payment request or needs to cancel a request, it's as simple as a click.



Step 1.

[Log into BPOINT](#) and and navigate to **Requests**, then **Manage requests**.

Requests ?

View filters (0 applied)

Merchant: All Items per page: 20

Status	Customer code	Type	Reference 1	Sent to	Amount
All		All			0.00
Unpaid		Payment only	abc	0400283783	AUD 100.00
Unpaid		Payment only	abc	0400283783	AUD 100.00
Cancelled		Payment only	1234	0400283783	AUD 100.00
Cancelled		Payment only	1234	0400283783	AUD 100.00
Unpaid		Payment only	123456	christian.noyes@linkly.com.au	AUD 150.00
Unpaid		Payment only	123456	christian.noyes@linkly.com.au	AUD 100.00
Overdue		Payment only	12345	christian.noyes@linkly.com.au	AUD 100.00
Cancelled		Payment only	123456	christian.noyes@linkly.com.au	AUD 100.00
Unpaid		Payment only	123456	christian.noyes@linkly.com.au	AUD 100.00
Overdue		Payment only	123456	christian.noyes@linkly.com.au	AUD 100.00
Overdue		Payment only	123456	lgpoint@demo.com.au	AUD 100.00
Overdue		Payment only	Demo	lgpoint@demo@lgpoint.com.au	AUD 1,000.00
Overdue		Payment only	A	jared.stevens@linkly.com.au	AUD 100.00



Step 2.

You can search requests via their details, using the shown searchable fields or by clicking **View filters**. Once you have found the request, click that row of information to enter the request detail page.

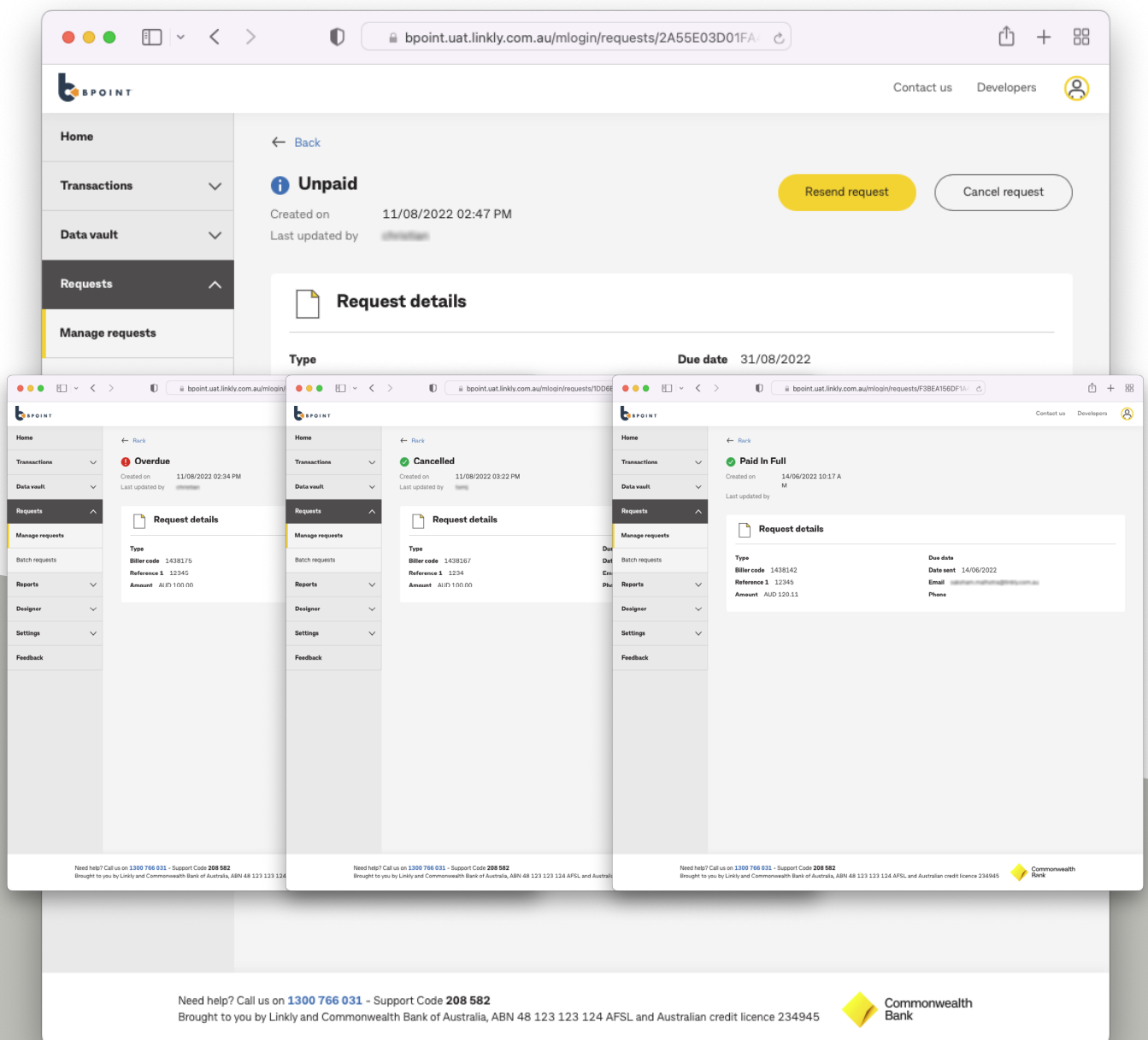
The screenshot shows the BPOINT web application interface. The left sidebar contains navigation links: Home, Transactions, Data vault, Requests (selected), Manage requests, Batch requests, Reports, Designer, Settings, and Feedback. The main content area is titled "Requests" and includes a "View filters (0 applied)" button. Below this, there are dropdown menus for "Merchant" (set to "All") and "Items per page" (set to "20"). A table of requests is displayed with the following columns: Status, Customer code, Type, Reference 1, Sent to, and Amount. The table contains 15 rows of request data.

Status	Customer code	Type	Reference 1	Sent to	Amount
All		All			0.00
Unpaid		Payment only	abc	0400283783	AUD 100.00
Unpaid		Payment only	abc	0400283783	AUD 100.00
Cancelled		Payment only	1234	0400283783	AUD 100.00
Cancelled		Payment only	1234	0400283783	AUD 100.00
Unpaid		Payment only	123456	christian.nayda@linkly.com.au	AUD 150.00
Unpaid		Payment only	123456	christian.nayda@linkly.com.au	AUD 100.00
Overdue		Payment only	12345	christian.nayda@linkly.com.au	AUD 100.00
Cancelled		Payment only	123456	christian.nayda@linkly.com.au	AUD 100.00
Unpaid		Payment only	123456	christian.nayda@linkly.com.au	AUD 100.00
Overdue		Payment only	123456	christian.nayda@linkly.com.au	AUD 100.00
Overdue		Payment only	123456	lgpoint@demo.com.au	AUD 100.00
Overdue		Payment only	Demo	lgpoint@demo@lgpoint.com.au	AUD 1,000.00
Overdue		Payment only	A	jared.stevens@linkly.com.au	AUD 100.00



Step 3.

On the request detail page, you will be able to see further information including status and customer information.



Step 4.

For a request that has not been completed by the customer yet, you can either **Resend request** to remind your customer to make the payment or **Cancel request** to cancel the request shared with your customer.

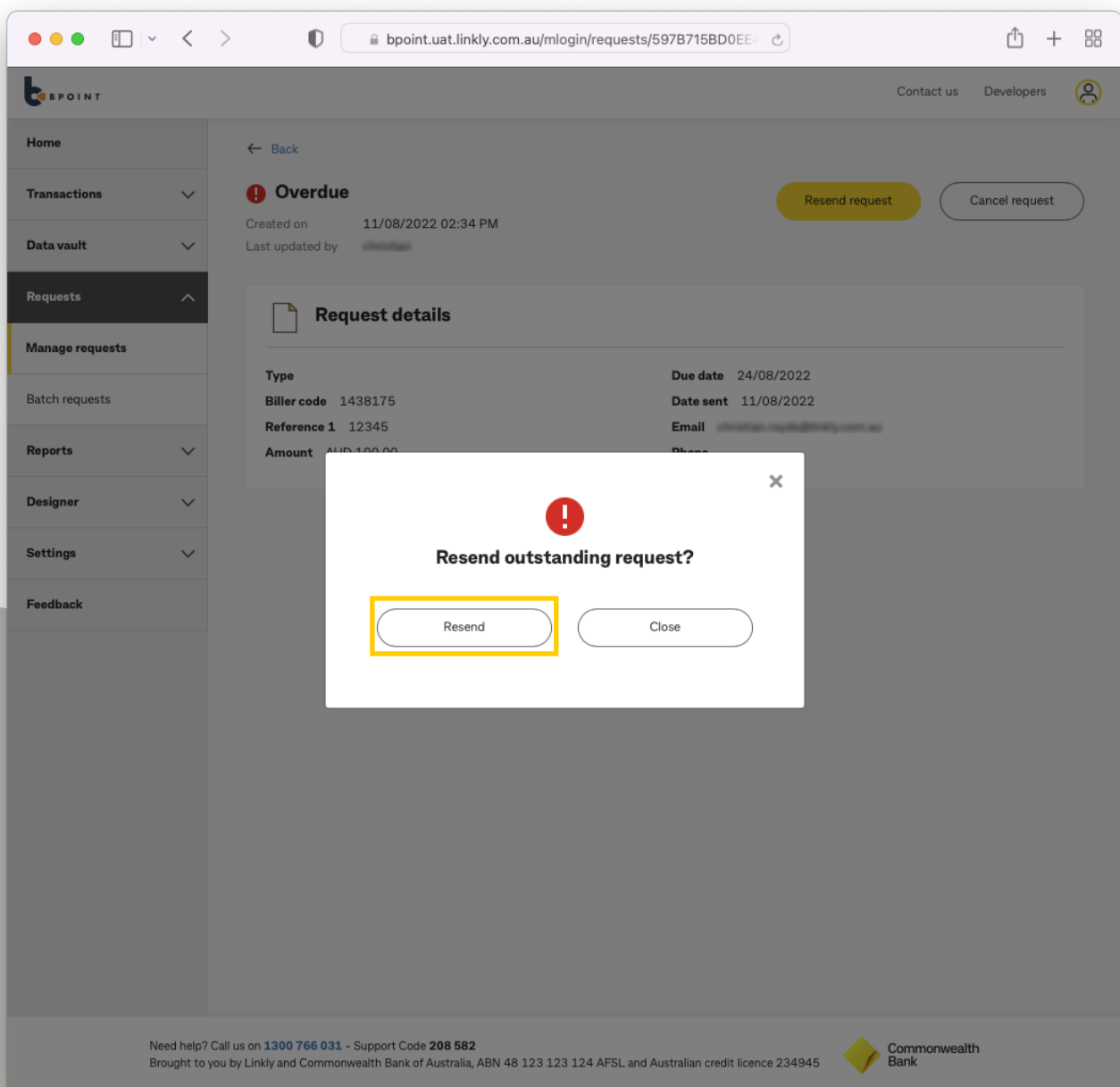
The screenshot shows the BPOINT web application interface. The left sidebar contains a navigation menu with items: Home, Transactions, Data vault, Requests (selected), Manage requests, Batch requests, Reports, Designer, Settings, and Feedback. The main content area displays a request status of 'Overdue' with a red exclamation mark icon. Below this, it shows the request details: Type, Biller code (1438175), Reference 1 (12345), Amount (AUD 100.00), Due date (24/08/2022), Date sent (11/08/2022), Email (christian.mads@linkly.com.au), and Phone. Two buttons, 'Resend request' and 'Cancel request', are highlighted with a yellow border. The footer contains contact information and the Commonwealth Bank logo.

Need help? Call us on [1300 766 031](tel:1300766031) - Support Code **208 582**
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Commonwealth Bank

Step 5.

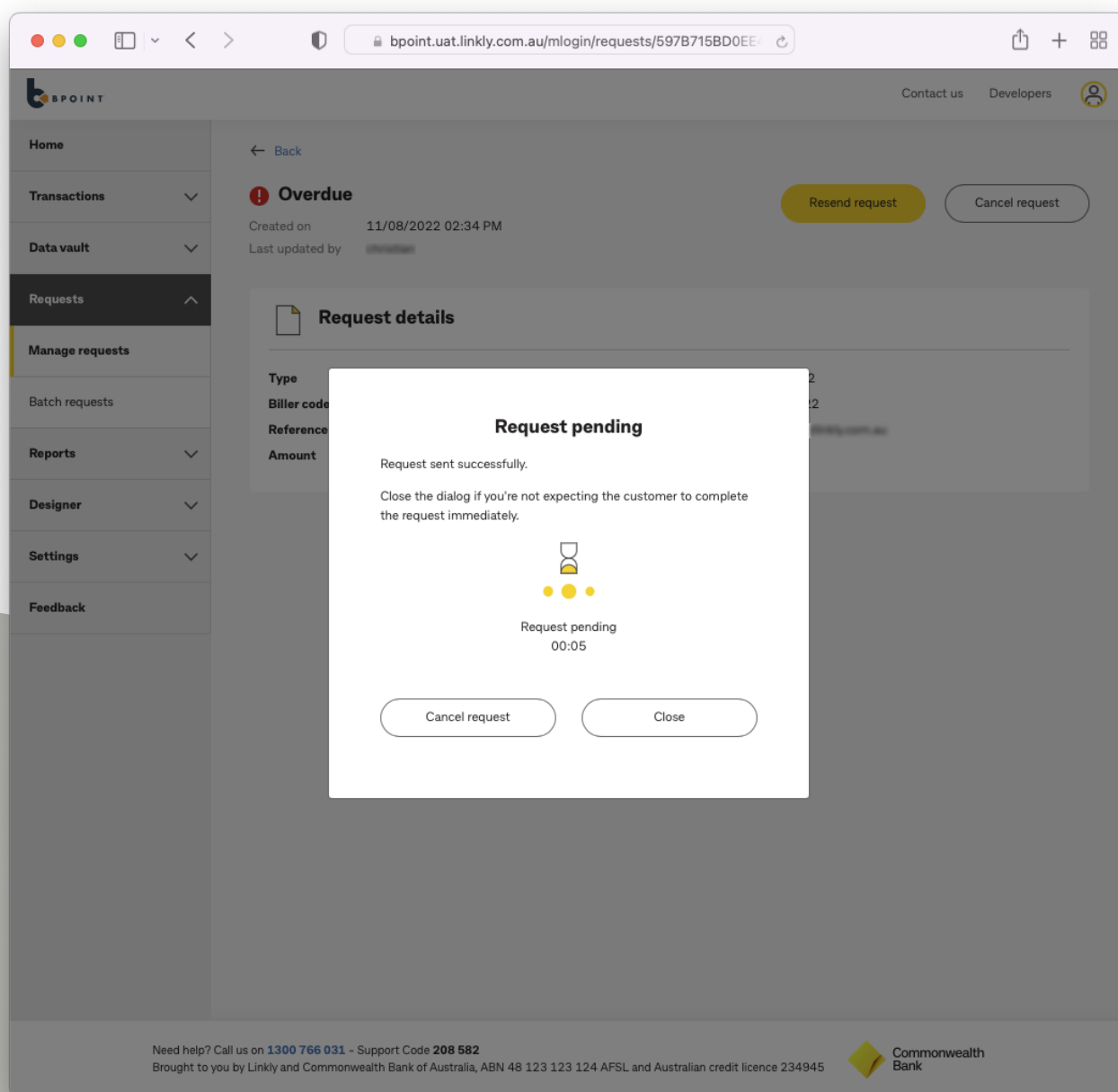
Clicking **Resend request** will prompt a confirmation before proceeding. Click **Resend** to proceed.



Step 6.

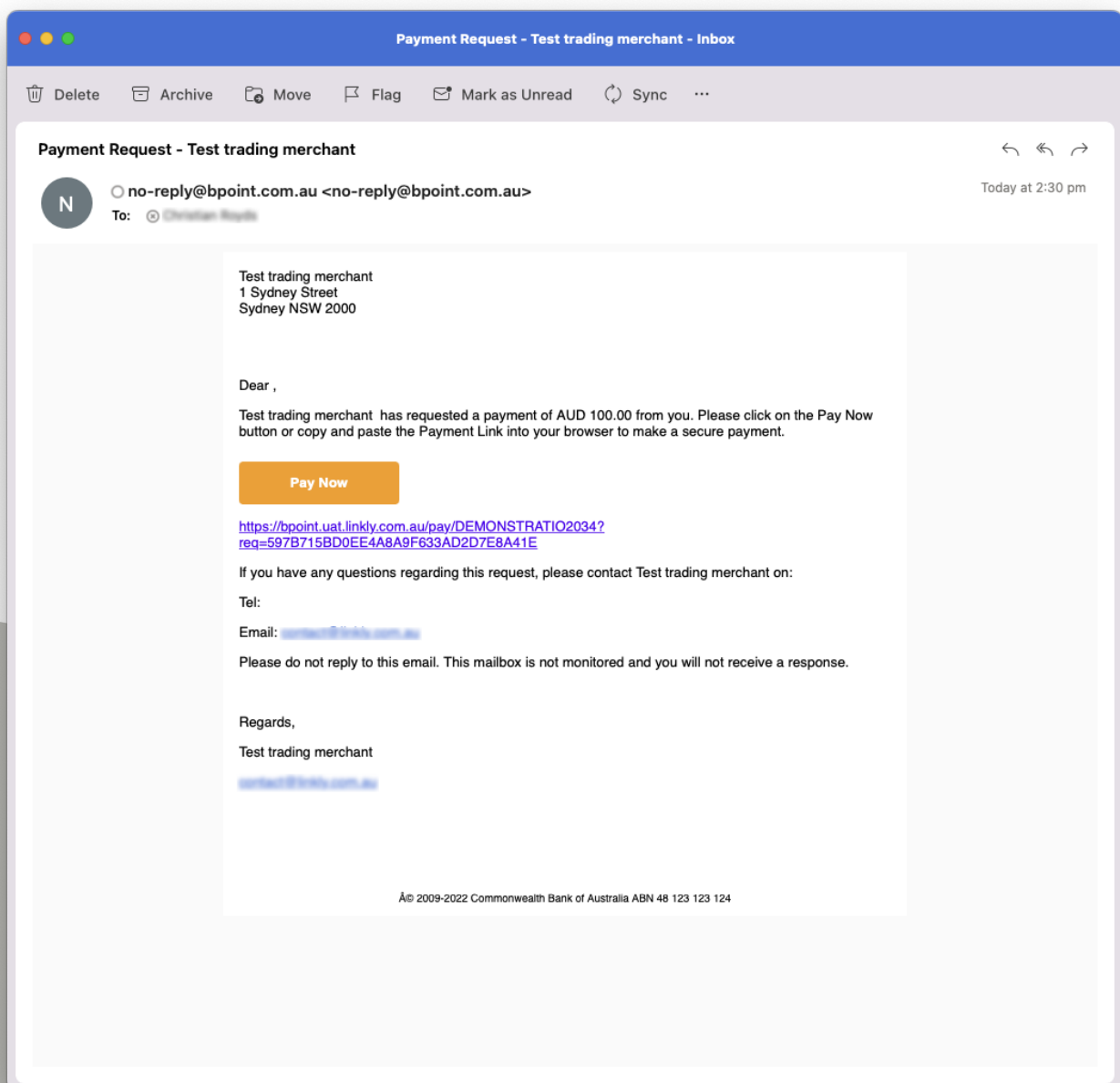
You will be shown a request pending dialogue box. If your customer is paying immediately, you will see pending change to paid, once payment is made.

If your customer is not expected to make the payment immediately you can **Close** the window.



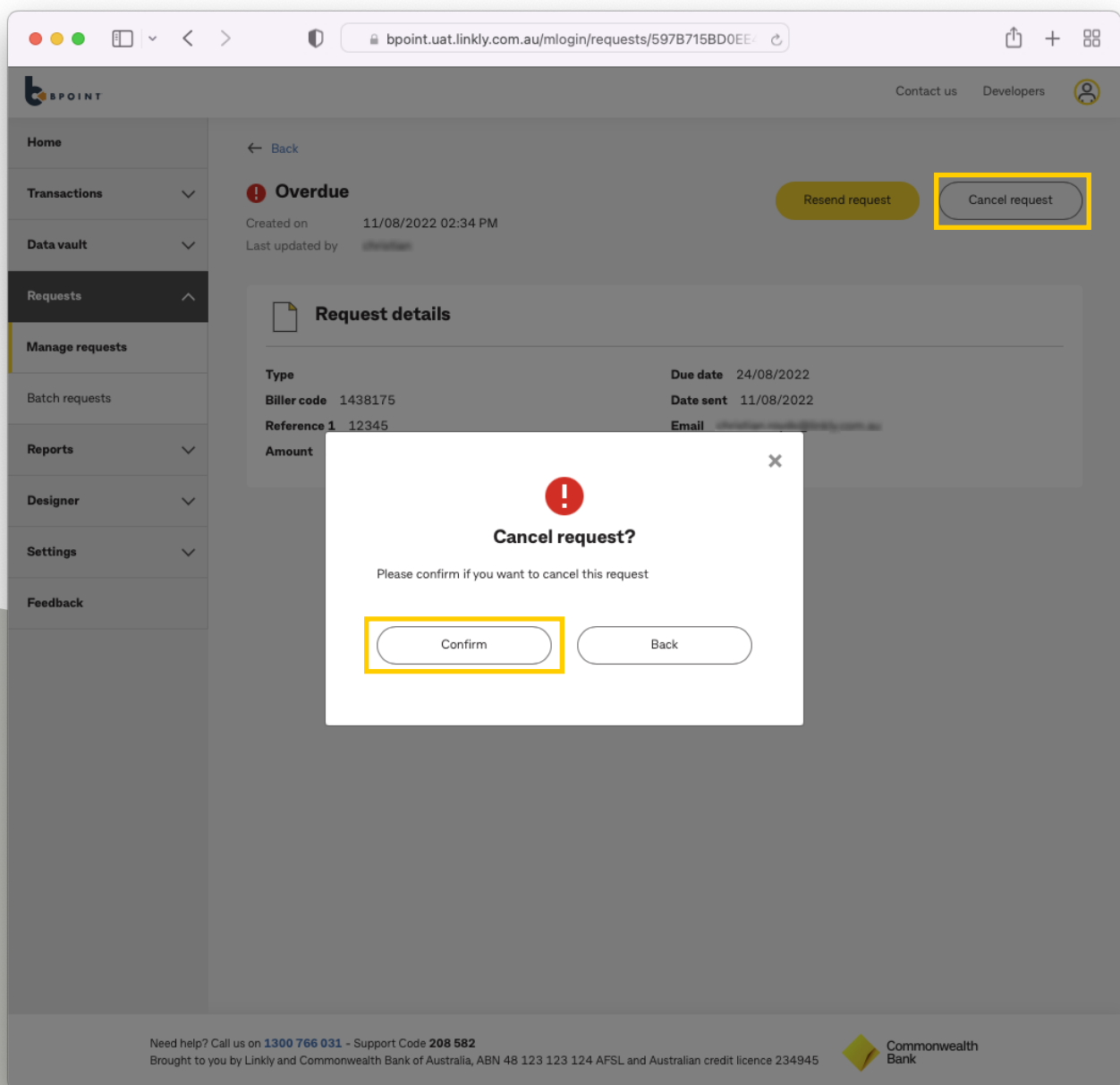
Step 7.

Your customer will receive the communication to make the payment.



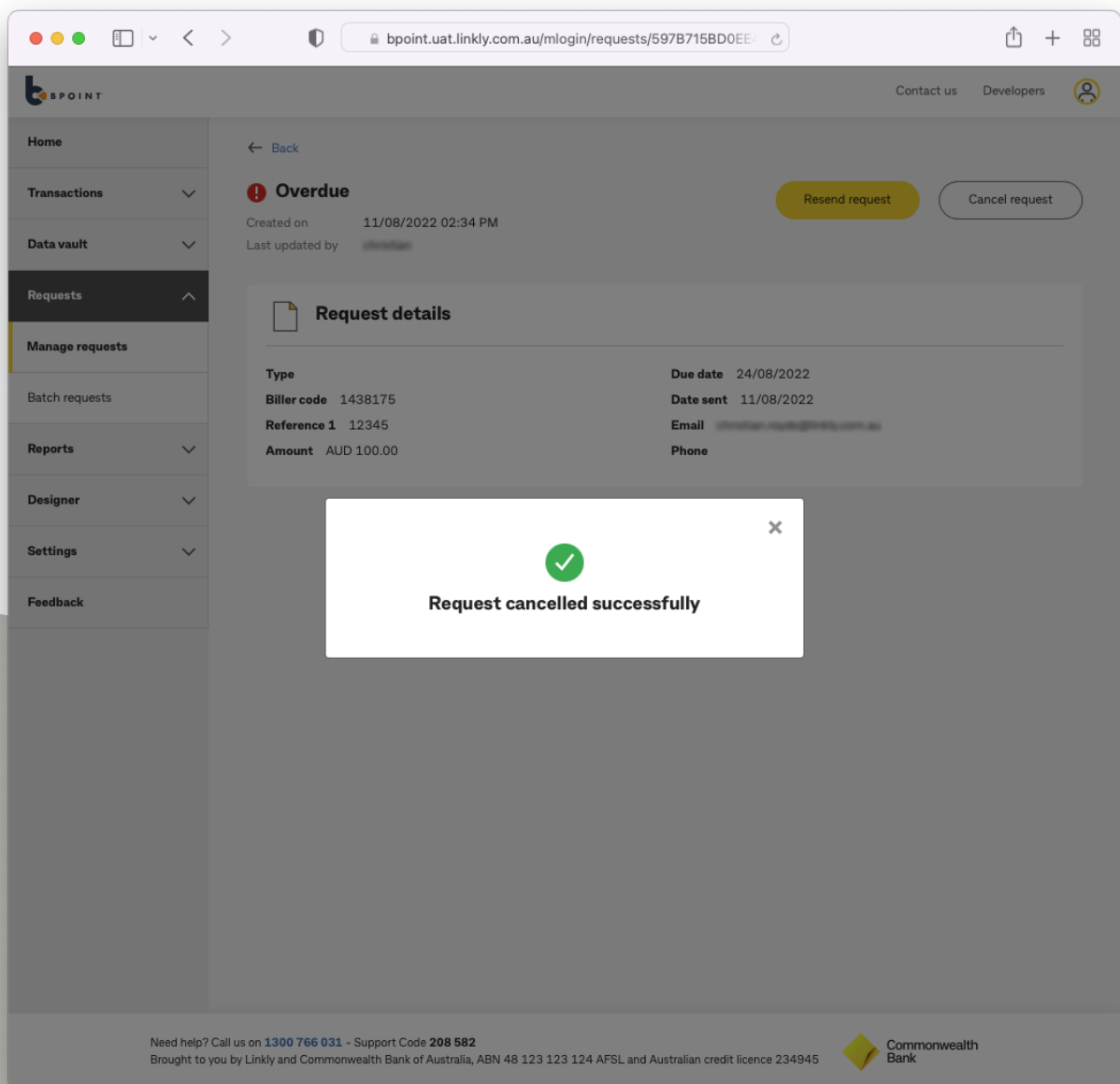
Step 8.

Clicking **Cancel request** will prompt confirmation before proceeding. Click **Confirm** to proceed.



Step 9.

A success notification will be displayed.



Step 10.

The request status has now updated to **Cancelled**.

The screenshot shows a web browser window with the URL `bpoint.uat.linkly.com.au/mlogin/requests/597B715BD0EE4`. The page features a sidebar on the left with navigation links: Home, Transactions, Data vault, Requests (highlighted), Manage requests, Batch requests, Reports, Designer, Settings, and Feedback. The main content area displays the request details for ID 597B715BD0EE4. At the top, a green checkmark icon and the word "Cancelled" are highlighted with a yellow box. Below this, the "Created on" date is 11/08/2022 02:34 PM, and the "Last updated by" field is empty. The "Request details" section contains the following information:

Type	Due date	24/08/2022
Biller code	Date sent	11/08/2022
Reference 1	Email	christian.martin@linkly.com.au
Amount	Phone	

At the bottom of the page, there is a footer with contact information: "Need help? Call us on 1300 766 031 - Support Code 208 582" and "Brought to you by Linkly and Commonwealth Bank of Australia, ABN 48 123 123 124 AFSL and Australian credit licence 234945". The Commonwealth Bank logo is also present.