



# Equifax Invoice Portal Quick Guide

For new customer users

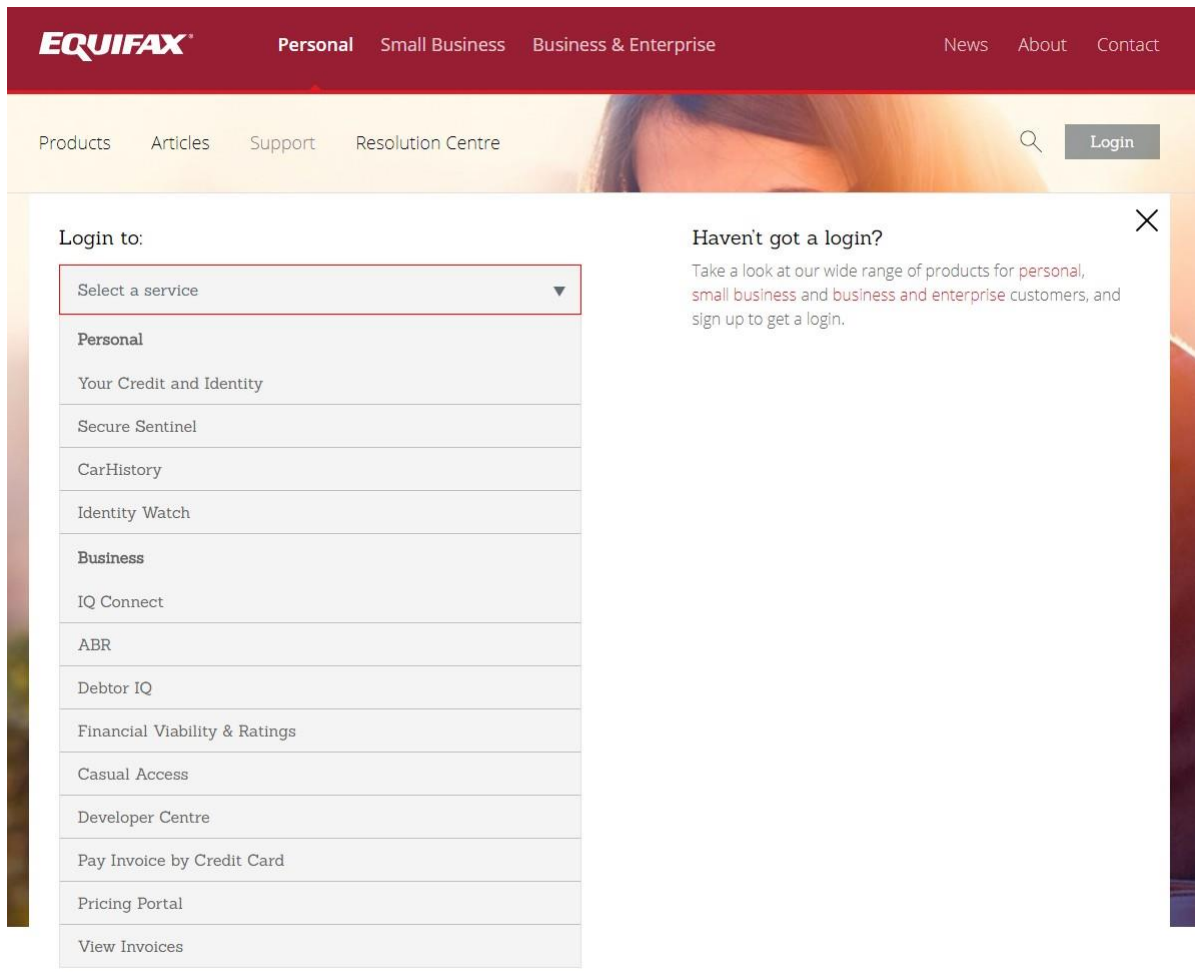
The Invoice Portal is a quick and easy one-stop shop for the documents relating to your Equifax *fit2work* billing, which can be accessed any time at your convenience.

## Getting started:

Equifax will establish one or more users in your organisation with 'customer admin' rights in the Invoice Portal. The customer admin user can then establish additional users for the Equifax accounts for which they require access.

Please email us at [invoiceportal.au@equifax.com](mailto:invoiceportal.au@equifax.com), specifying your name, organisation and your Equifax account number (on your invoice and prefixed with 'M') and we will set up your customer admin user on the Invoicing Portal, or you can call us on 1300 921 621.

The portal can be accessed through the Equifax website (<https://www.equifax.com.au/>) by finding 'Login' at the top, and selecting 'View Invoices' from the drop-down options.



The screenshot shows the Equifax website's navigation and login options. The top navigation bar includes 'Personal', 'Small Business', and 'Business & Enterprise'. A search bar and a 'Login' button are visible. A dropdown menu is open, showing options like 'Personal', 'Business', and 'View Invoices'. A sidebar on the right asks 'Haven't got a login?' and provides a link to sign up.

Once you have selected 'View Invoices', you will be directed to the login screen. The quick link is <https://viewpoint.computershare.com/Equifax/Login.aspx>

Please enter the login details provided to you to access the portal.



Login

DETAILS

Username

Password

[Forgotten Your Password? Click here.](#)

Upon your first time logging in, you will be prompted to agree to the Terms and Conditions and consent to e-statements (meaning the invoices will be emailed to you rather than being sent in the mail).

## View & Download Documents

The Equifax Invoice Portal allows you to view or download current or past invoices in pdf or MS Excel format, and to download a transactions file showing all of the transactions that have been billed in the invoice.

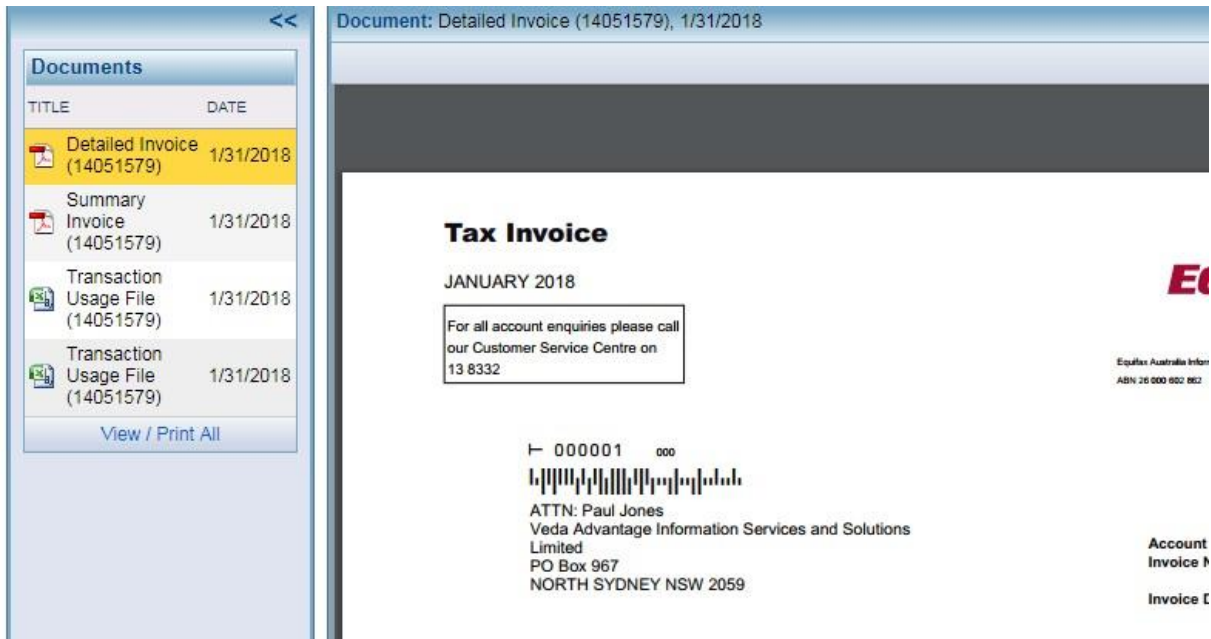
ACCOUNT NUMBER	ACCOUNT NAME	INVOICE NUMBER	DATE	INVOICE AMOUNT	RECIPIENT	
9999999999	Operations Ltd Accounts Payable	12687360	31/08/2012	\$27,368.39	ACCOUNTSPAYABLE	<a href="#">View</a>
9999999999	Operations Ltd Accounts Payable	12676004	31/07/2012	\$17,910.81	ACCOUNTSPAYABLE	<a href="#">View</a>
9999999999	Operations Ltd Accounts Payable	407598	31/03/2012	\$100,891.36	ACCOUNTSPAYABLE	<a href="#">View</a>
9999999999	Operations Ltd Accounts Payable	399515	29/02/2012		ACCOUNTSPAYABLE	<a href="#">View</a>
9999999999	Operations Ltd Accounts Payable	390441	31/01/2012		ACCOUNTSPAYABLE	<a href="#">View</a>
9999999999	Operations Ltd Accounts Payable	381442	31/12/2011		ACCOUNTSPAYABLE	<a href="#">View</a>
9999999999	Operations Ltd Accounts Payable	372306	30/11/2011		ACCOUNTSPAYABLE	<a href="#">View</a>
9999999999	Operations Ltd Accounts Payable	363254	31/10/2011		ACCOUNTSPAYABLE	<a href="#">View</a>
9999999999	Operations Ltd Accounts Payable	354214	30/09/2011		ACCOUNTSPAYABLE	<a href="#">View</a>
9999999999	Operations Ltd Accounts Payable	345069	31/08/2011		ACCOUNTSPAYABLE	<a href="#">View</a>

To view or download invoices or transaction usage files, select 'Invoices' from the top line menu. You will be presented with a list of documents. Select 'View' on the right-hand side of the screen for the specific item you wish to view, download or print.

To view multiple invoices simultaneously, click the boxes of the required invoices on the left and click 'View Selected' at the bottom – this will open all of the invoices as a single PDF file.

Once the invoice has opened in a new window, you will notice along the side bar there is an option to view different file types -

- **Detailed Invoice:** The larger document containing a summary of the charges for the month
- **Summary Invoice:** The first page of the invoice only
- **Transaction Usage File:** An excel sheet containing a detailed list of all the transactions that have been billed on that invoice



## UNBILLED USAGE:

You can use the Invoice Portal to view usage for the current month that has not yet been billed to your account. To do this, click 'Unbilled Usage' at the top of the screen, and click 'View' on the document that appears as before. Please note that unbilled usage will take time to be loaded into our system so very recent usage will not be available.

## SETTINGS:

By clicking the Administration option at the top, you will see the following options:



**Users:** Edit and view the Invoice Portal users that are available for this account.

**User Restrictions:** View the access rights and documents that are available for each user for the account on the Invoice Portal.

## Manage User Restrictions

User restrictions are the ability to restrict a user to a subset of accounts. To manage user restrictions, select 'Administration' then 'User Restrictions' from the top line menu.

You can connect a group of users to a set of document types and a set of accounts for the purposes of restricting the functions that a group of users can perform. Firstly, you must create the group by selecting 'New Group' and entering a group name.

Once you have created a group, you can populate it with the Users and Accounts to form the group.

The screenshot shows a tree view under the heading 'CONTENT ACCESS GROUPS'. The tree is expanded to show the following structure:

- Available Groups
  - Available Accounts
    - 0000000000 - Veda Advantage Information Services and Solutions Limited
  - Available Document Types
    - Detailed Invoice
    - Summary Invoice
    - Transaction Usage File
    - Unbilled Usage File
  - Available Users
    - arjun.takkar1 - Arjun Takkar
    - Test.User - Test User
    - test\_saval - test test

## Update User information

From the 'Settings' tab, you can update your user information:

The screenshot shows the 'Settings' tab selected in a navigation bar. Below the navigation bar, the 'Personal Details' section is visible. The 'DETAILS' header is highlighted in blue. The form contains the following fields:

First Name	Test
Last Name	User
<b>Password Reset Details</b>	
Email Address	<input type="text" value="Test.User@veda.com.au"/>
Delivery Email Address	<input type="text" value="Test.User@veda.com.au"/>
Delivery Fax Number	<input type="text"/>

Or change your password:

The screenshot shows the 'Settings' tab selected in a navigation bar. Below the navigation bar, the 'Change Password' section is visible. The 'DETAILS' header is highlighted in blue. The form contains the following fields:

Old Password	<input type="password"/>
New Password	<input type="password"/>
Confirm New Password	<input type="password"/>

## Account Invoice Delivery Preferences

Update your billing preference to 'Email PDF Only' or 'Email Notification Only', and amend the email address that the invoices are sent to. Please click 'Apply' at the bottom of the page to save any changes to this information.

Accounts	0000000000
Delivery Preference	4. Email PDF Only ▼
Account Contact Name	Test User
Email Address	test.user@veda.com.au

## Usage File Format

Field	Description
<b>Record Type</b>	"B" for billed transactions.
<b>Billing Service Number</b>	The service number for the service under the billing account upon which the transactions will be billed.
<b>Service Type</b>	Will display as Mercury fit2work, Verify, Verify NZ for Equifax internal purposes.
<b>Billing Account Number</b>	The billing account upon which the transactions will be billed. Your Equifax billing account number can be found on the top right-hand side of your Equifax invoice.
<b>Carrier ID</b>	Delivery Channel. Indicates how the transaction was delivered to Equifax.
<b>Billing System Product Code</b>	The internal Equifax billing system product code or product number.
<b>Source System Identifier</b>	Identifies Equifax system that originated the transaction which is always fit2work.
<b>Source System Product Code</b>	Product code used by Equifax source system. This is the product code that is shown against transactions on invoices.
<b>Product Description</b>	Description of the fit2work check.
<b>Subject</b>	Candidate name for fit2work checks.
<b>Non-discounted Amount</b>	The standard charge for the transaction, before any discounts.
<b>Discounted Amount</b>	The charge for the transaction. For billed records, this is the actual amount billed to the customer.
<b>Volume</b>	Will usually be 1, but varies according to the product.

<b>Units</b>	What the volume is counting. Eg: Transactions or entities monitored.
<b>Currency</b>	The currency that the invoiced amount is charged in (AUD or NZD).
<b>Originating Branch</b>	Your organisation's fit2work Division ID or Subscriber Code linked to your Division Name.
<b>Country</b>	Australia or New Zealand.
<b>Date</b>	Transaction Date.
<b>Time</b>	Transaction Time.
<b>Enquiry Purpose</b>	N/A
<b>Matched/Unmatched</b>	N/A
<b>Job Number</b>	The fit2work Reference Number for the Candidate's fit2work checks.
<b>File Number</b>	N/A
<b>Userld</b>	N/A
<b>Userid Name</b>	The User Account or Client User who ordered the fit2work check.
<b>Client Defined Field 1</b>	Fit2work Work Groups (if your Organisation has set them up).
<b>Client Defined Field 2</b>	Fit2work Cost Centres (if your Organisation has set them up).
<b>Transaction Reference</b>	Details of any additional fees charged for a fit2work check (international Qualification checks and Professional Membership checks).
<b>Alerts Portfolio Name</b>	N/A
<b>Billed Indicator</b>	Indicates whether the product is: Billable, Non-Billed or Non-Charged
<b>Invoice Number</b>	Invoice in which this enquiry was charged.
<b>Authority Fee Amount</b>	N/A
<b>Taxable Fee Amount</b>	The Equifax Transaction Charge not including the Authority Fee.
<b>GST Amount</b>	Amount of GST charged on this transaction.

