



- DebiCheck:
 - + Add Instalments quick guide (Website) – V1



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Section A: Adding Instalments

Step 1: Log into the NuPay website by entering the following URL link into the browser

Link: <https://www.nupayments.co.za/>

Step 2: Log in – Complete the required fields, see Fig 1.

- ✓ Enter the User ID & Password
- ✓ Accept the Terms and Conditions (Ensure that you familiarise yourself with the content herein)
- ✓ Click on the “Log in” button

(N.B If the User cannot remember your password, click on the “**Forgot Password?**” tab and the system will assist you in creating a new password)

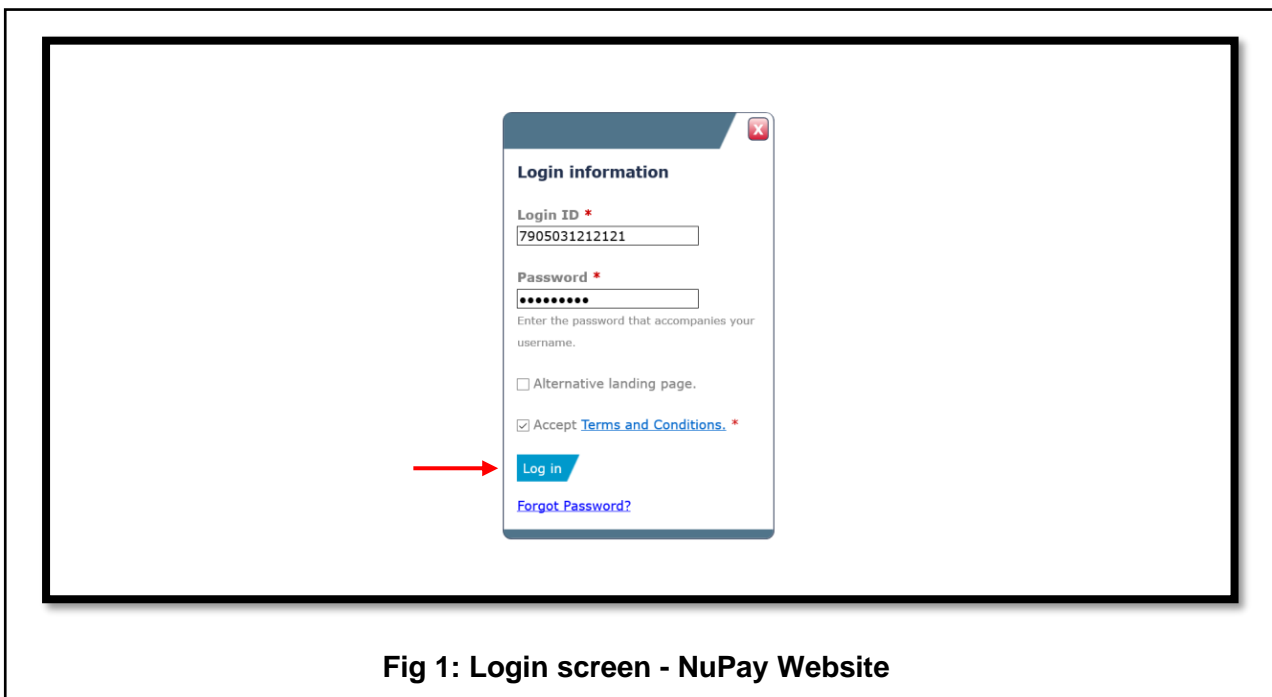
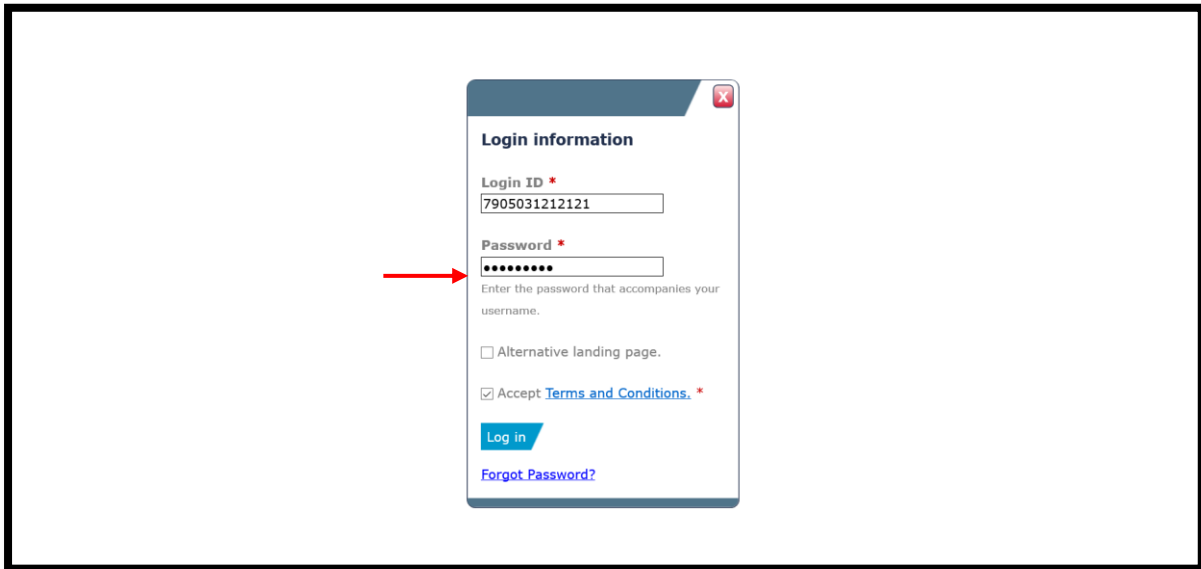


Fig 1: Login screen - NuPay Website

Step 2: The User can also “Log in” by ticking the **Alternate landing page** option and click **Log in**, see Fig 2.



Login information

Login ID *
7905031212121

Password *
Enter the password that accompanies your username.

Alternative landing page.

Accept [Terms and Conditions.](#) *

[Log in](#)

[Forgot Password?](#)

Fig 2 – Alternate Landing page

Step 3: Once the User has entered the correct “Log in” details, they will be directed to the following homepage, see Fig 3.



Fig 3: Homepage - NuPay Website

Step 3: Click the **Collections icon** for the NuPay Product List and select **DebiCheck**, see Fig 4.



Fig 4: Product List - NuPay Website

Step 5: Select the **Merchant number** (The unique number that is allocated to the Merchant by NUPAY) in the Access Selection screen, and click **Continue**, see Fig 5.



Fig 5: Access Selection - NuPay Website

Step 6: Click **Maintenance**, **Transaction Maintenance** or click **Transaction Maintenance** under **Available Functions** at the centre of the screen, see Fig 6.



Fig 6: Transaction Maintenance

Step 7: Select **Instalment Maintenance** from the **Maintenance Type** drop down, see Fig 7.

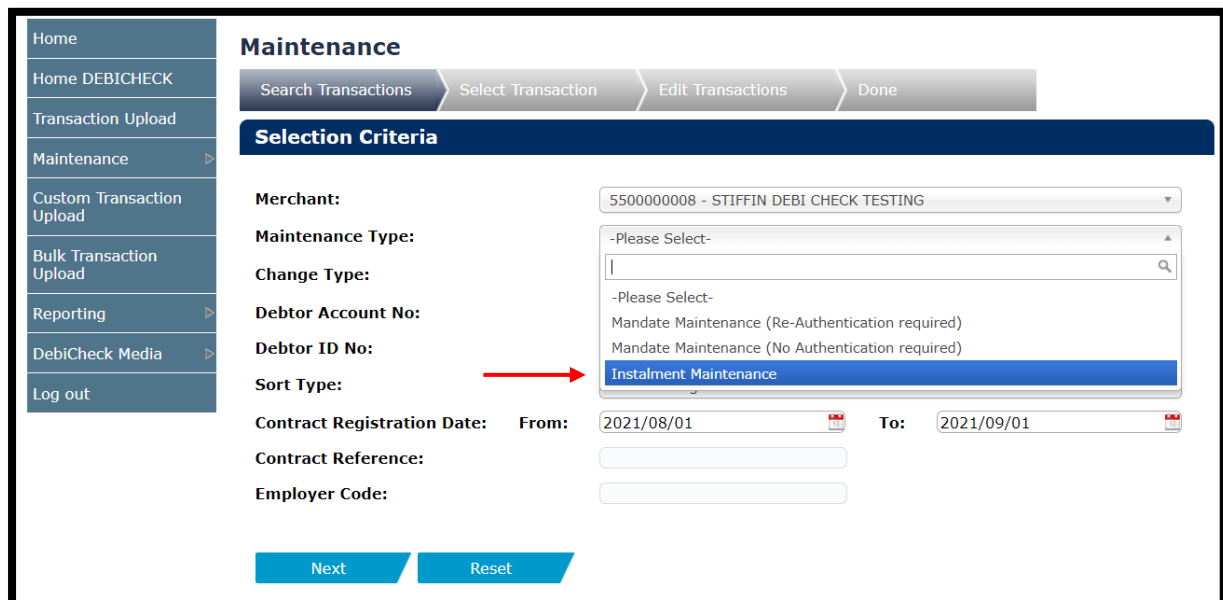


Fig 7: Maintenance – Search Transactions screen

Step 8: Select **Add Instalments** from the **Change Type** drop down, see Fig 8.

The screenshot displays the 'Maintenance' selection criteria page. On the left is a sidebar with menu items: Home, Home DEBICHECK, Transaction Upload, Maintenance, Custom Transaction Upload, Bulk Transaction Upload, Reporting, DebiCheck Media, and Log out. The main content area is titled 'Maintenance' and features a progress bar with four steps: Search Transactions, Select Transaction, Edit Transactions, and Done. Below this is the 'Selection Criteria' section, which includes the following fields and options:

- Merchant:** 550000008 - STIFFIN DEBI CHECK TESTING
- Maintenance Type:** Instalment Maintenance
- Change Type:** Tracking (dropdown menu is open, showing options: Tracking, Submit Date, Instalment Amount, De-activate Instalment, Reschedule Maintenance, **Add Instalments** (highlighted), Re-activate Instalment, Tracking + Submit Date)
- Debtor Account No:**
- Debtor ID No:**
- Sort Type:**
- Contract Registration Date:** From:
- Contract Reference:** (indicated by a red arrow)
- Employer Code:**

At the bottom of the form are two buttons: 'Next' and 'Reset'.

Fig 8 – Add Instalments

Note: Complete as many fields as possible on the Selection criteria page, to refine the search for a specific mandate, for example enter the required contract reference number, date range, debtor ID etc.

Step 9: Select the required **Mandate ID** or select ALL Mandate IDs, should the User want to do a Mass change, click **Select**, see Fig 9.

Maintenance

Search Transactions > Select Transaction > Edit Transactions > Done

Search Criteria

Maintenance Type: Add Instalments
 Merchant: 000005500000008
 Debtor Account No:
 Debtor ID No:
 Date: 2021/08/01 - 2021/08/02
 Contract Reference:
 Employer Code:

Maintainable Instalments								
	<input type="checkbox"/>	Mandate ID	Reference	Instalment	Number of Instalments	Tracking	Instalment Amount	Start Date
	<input checked="" type="checkbox"/>	3111166	DCPRD00002KRQP	2	8	3 Day Tracking	0.01	2021-08-06
2	<input type="checkbox"/>	3139516	DCPRD00002LH12	2	2	2 Day Tracking	11.00	2021-08-04
3	<input type="checkbox"/>	3140236	DCPRD00002LHLN	2	2	3 Day Tracking	100.00	2021-08-04

Select Back

Fig 9 – Select Transaction screen

Step 10: Click **Submit**, see Fig 10.

Maintenance

Search Transactions > Select Transactions > Edit Transactions > Done

Please note: All records in this table will be submitted for instalment addition upon confirmation.

Add Instalment

	Mandate ID	Reference	Instalment	Number of Instalments	Tracking
1	3111166	DCPRD00002KRQP	2	8	3 Day Tracking

Submit Back

Fig 10 – Edit Transactions screen

Note: Fig 10 displays that this mandate has a total of 8 Instalments.

Step 11: Click **Ok** to confirm the changes made or **Cancel** to undo the changes, see Fig 11.

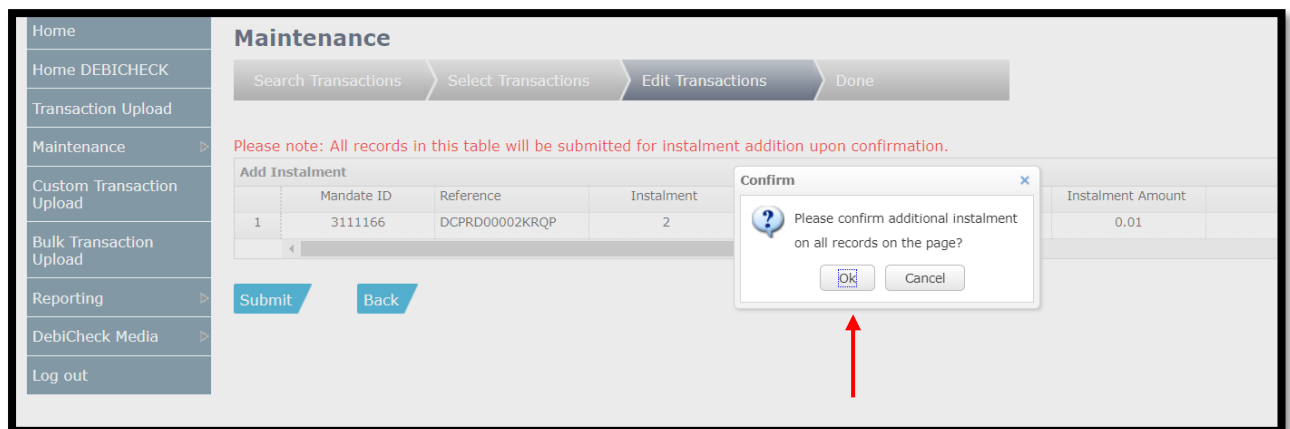


Fig 11 – Confirmation screen

Step 12: A confirmation screen will be displayed, click **Done**, see Fig 12.

Note : If the description displays “Failed”, then a reason for the failure will also be displayed.

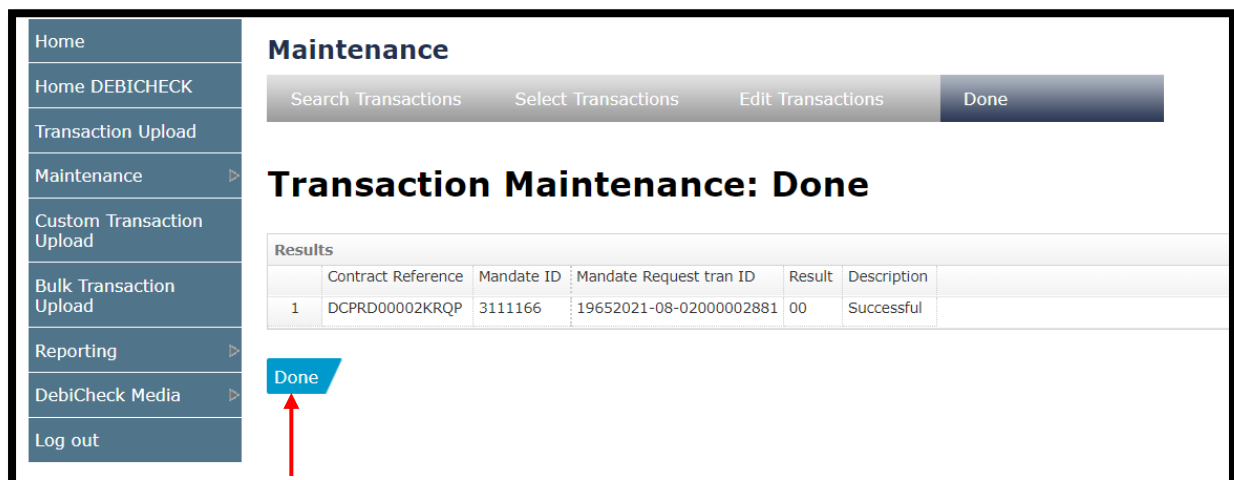
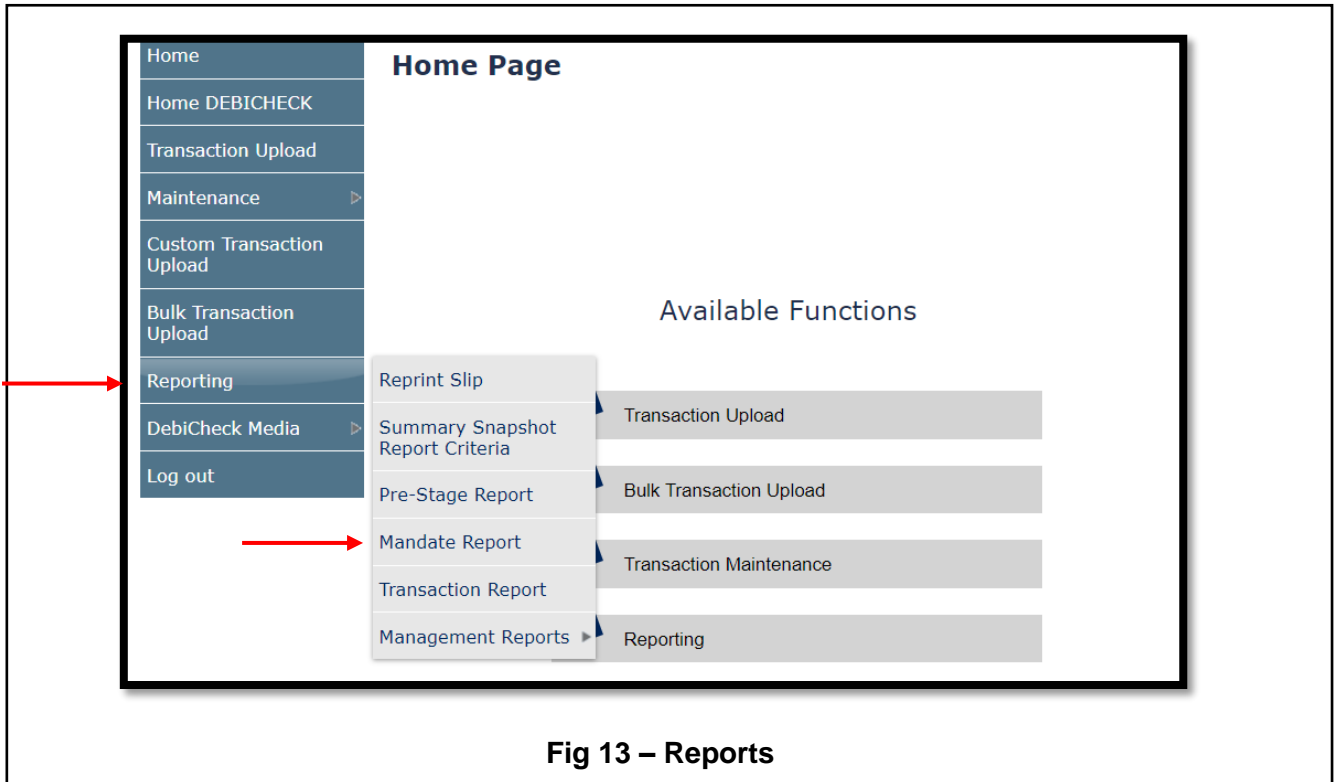


Fig 12 – Done screen

Section B: Reports

Step 1: Select Reporting, Mandate Report, see Fig 13.



Step 2: Enter the Date selection and the Contract Reference number or complete as many fields as possible to refine the search and click **Continue**, see Fig 14.

The screenshot displays the 'Mandate Report' interface with a sidebar on the left containing navigation links: Home, Home DEBICHECK, Transaction Upload, Maintenance, Custom Transaction Upload, Bulk Transaction Upload, Reporting, DebiCheck Media, and Log out. The main content area is divided into four steps:

- Step 1 - Report Selection:** Includes checkboxes for 'Active / Future', 'Pending Authorisation', 'Rejected Authorisation', 'Inactive', 'Suspended', and 'All Reports'.
- Step 2 - Field Selection:** Includes radio buttons for 'NuPay Default Report Fields', 'Select own fields', and 'Select all Fields'.
- Step 3 - Delivery Selection:** Includes dropdown menus for 'Delivery Criteria' (Detailed on Screen Enquiry), 'Grouping Criteria' (Mandate ID), and 'Sorting Criteria' (Create Date).
- Step 4 - Selection Criteria:** Includes a 'Merchant' dropdown (5500000008 - STIFFIN DEBI CHECK TESTING), 'Date' fields for 'From' (2021/08/01) and 'To' (2022/09/30), and input fields for 'Debtor Account No.', 'Debtor ID No.', 'Contract Reference' (DCPRD00002KRQP), 'Employer Code', and 'Mandate ID'.

At the bottom, there are 'Continue' and 'Reset' buttons. A red arrow points to the 'Continue' button.

Fig 14 - Mandate Report

Step 3: The Mandate will appear under **Active/Future mandates**.

Expand the screen by clicking on the +, all of the Instalments will be displayed. The User will see the “Added Instalment” is displayed at the end of the contract see Fig 15.

In this example Instalment 9 was added – Refer to Fig 10 to view the initial number of instalments.

Mandate Report

Search Criteria

Date: 2021/08/01 - 2022/09/30
Merchant ID: 5500000008 - STIFFIN DEBI CHECK TESTING
Debtor Account No:
Debtor ID No:
Contract Reference: DCPRD00002KRQP
Employer Code:
Mandate ID:

Active / Future Mandates

Print CSV PDF Excel

	Mandate ID	Contract Reference	Date of First Instalment	Instalment	Instalments	Tracking	Frequency	Collection Day
1	3111166	DCPRD00002KRQP	2021-08-06	2	9	3 Day Tracking	Monthly	06

	Mandate ID	Instalment	Tracking	Instalment Amount	Start Date	Cycle Date	Submit Date	Disputable	Status
1	3111166	1	3 Day Tracking	0.01	2021-08-06	2021-08-06	2021-08-06	No	Successful
2	3111166	2	3 Day Tracking	0.01	2021-08-06	2021-09-06	2021-09-06	No	Pending
3	3111166	3	3 Day Tracking	0.01	2021-08-06	2021-10-06	2021-10-06	No	Pending
4	3111166	4	3 Day Tracking	0.01	2021-08-06	2021-11-06	2021-11-06	No	Pending
5	3111166	5	3 Day Tracking	0.01	2021-08-06	2021-12-06	2021-12-06	No	Pending
6	3111166	6	3 Day Tracking	0.01	2021-08-06	2022-01-06	2022-01-06	No	Pending
7	3111166	7	3 Day Tracking	0.01	2021-08-06	2022-02-06	2022-02-07	No	Pending
8	3111166	8	3 Day Tracking	0.01	2021-08-06	2022-03-06	2022-03-07	No	Pending
9	3111166	9	3 Day Tracking	0.01	2021-08-06	2022-04-06	2022-04-06	No	Pending
Report Total				R 0.09					

Fig 15 – Added Instalment Mandate report

Rules:

1. The “Added Instalment” is not Reversible as the User cannot change the Collection Date or the Collection Amount, however if the User does other maintenance, it will become reversible.
2. The “Added Instalment” will always move to the end of the contract.
3. The User cannot Add Instalments on a Recurring mandate.
4. All Instalment Maintenance must be done at least 2 working days before the Action Date.