Windcave

Payline® User Guide

Version 1.2

Copyright

Proprietary Notice

Document Revision Information and Amendments

All amendments are to be identified and the manual updated, noting the amendment on this amendment page.

Version	Date	Section	Revision Information	Amended by
1.0	2016/10/07	All	Initial Release	JA
1.1	2019/12/30	All	Name change updates and migration to new document format Updated to Include latest Parameters and Parameter names	KH
1.2	2021/09/21	5	Updated password update frequency	KH

Related Documents

Document title	Link/Location

Contents

1 Overview

Payline® is a web-based payment manager that can be used to process credit card transactions manually, process refunds, set up recurring payments, view transactions in real-time and generate reports to name a few of its functions. All transactions processed via any Windcave API can be found on Payline®.

Payline® access is included with all Windcave® accounts.

It is most commonly used by organizations that require a cost effective, quick, simple process for accepting credit card payments.

Payline® can also be scaled for call centres or for organizations that require the ability to accept credit card payments in a card-not-present environment.

Payline® is popular with business that have traditionally telephoned or faxed credit card details to the bank for processing, and are now at the stage where real-time, processing and next-day settlement of funds is required.

Each individual Payline® user can be configured with privileges to meet their required needs.

Key Benefits

- Recurring Billing
- Set and forget payments
- Ability to view transactions in real-time
- Ability to process manual transactions (Purchase/Refund/Auth/Complete/Void).
- Downloadable reports that allow for quick, easy reconciliation
- Billing Vault - Secure storage of credit cards
- Process Mail Order / Telephone Orders
- Scalable – Perfect for call centres
- Secure – Payline® is hosted within Windcave' level 1 PCI-DSS complaint environment. Multiple logins with different privileges

Windcave

2   Logging into Payline®

You can logon to Payline® though our website at https://www.windcave.com/ using the username and password provided with your account. Click "Logon", at the top right-hand corner of the website.

Direct Login URL: https://sec.windcave.com/pxmi3/logon

Version: 1.2

Once you log in successfully, you will be presented with the main screen. All available privileges assigned to the Payline® user will be displayed in the navigation menu on the left. More information about privileges can be found in Section 9.
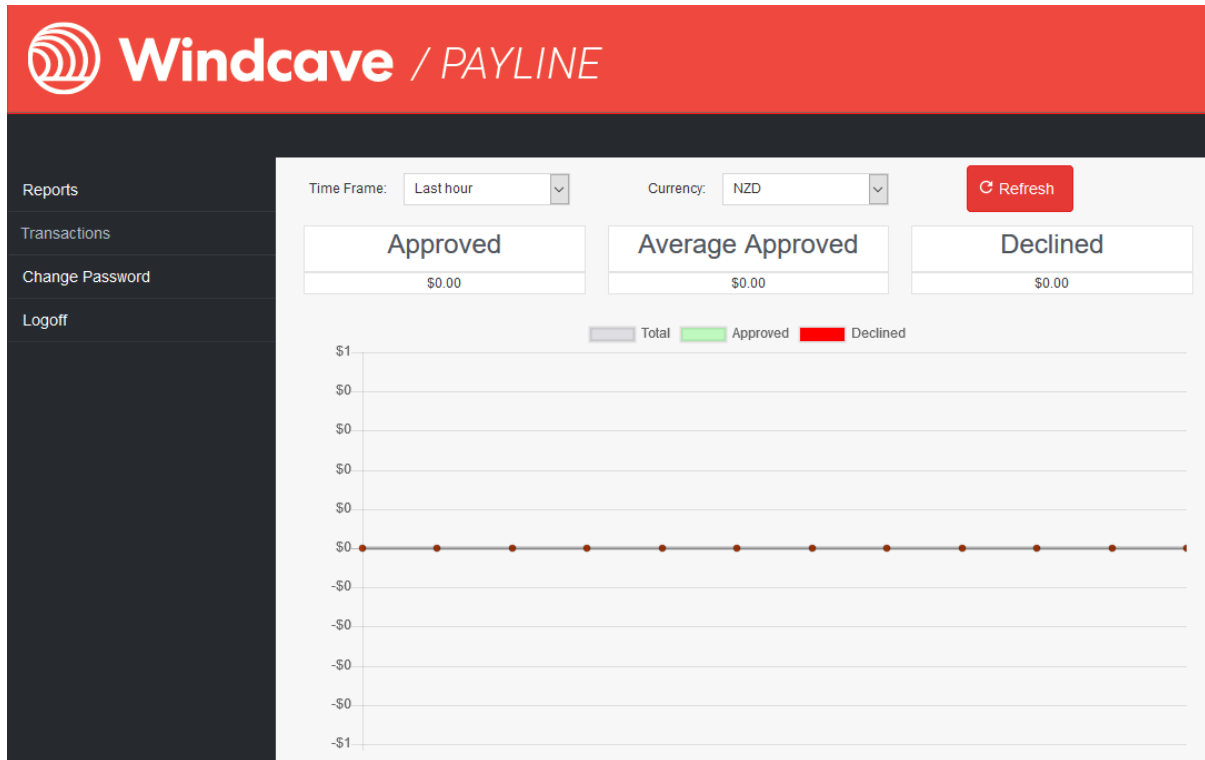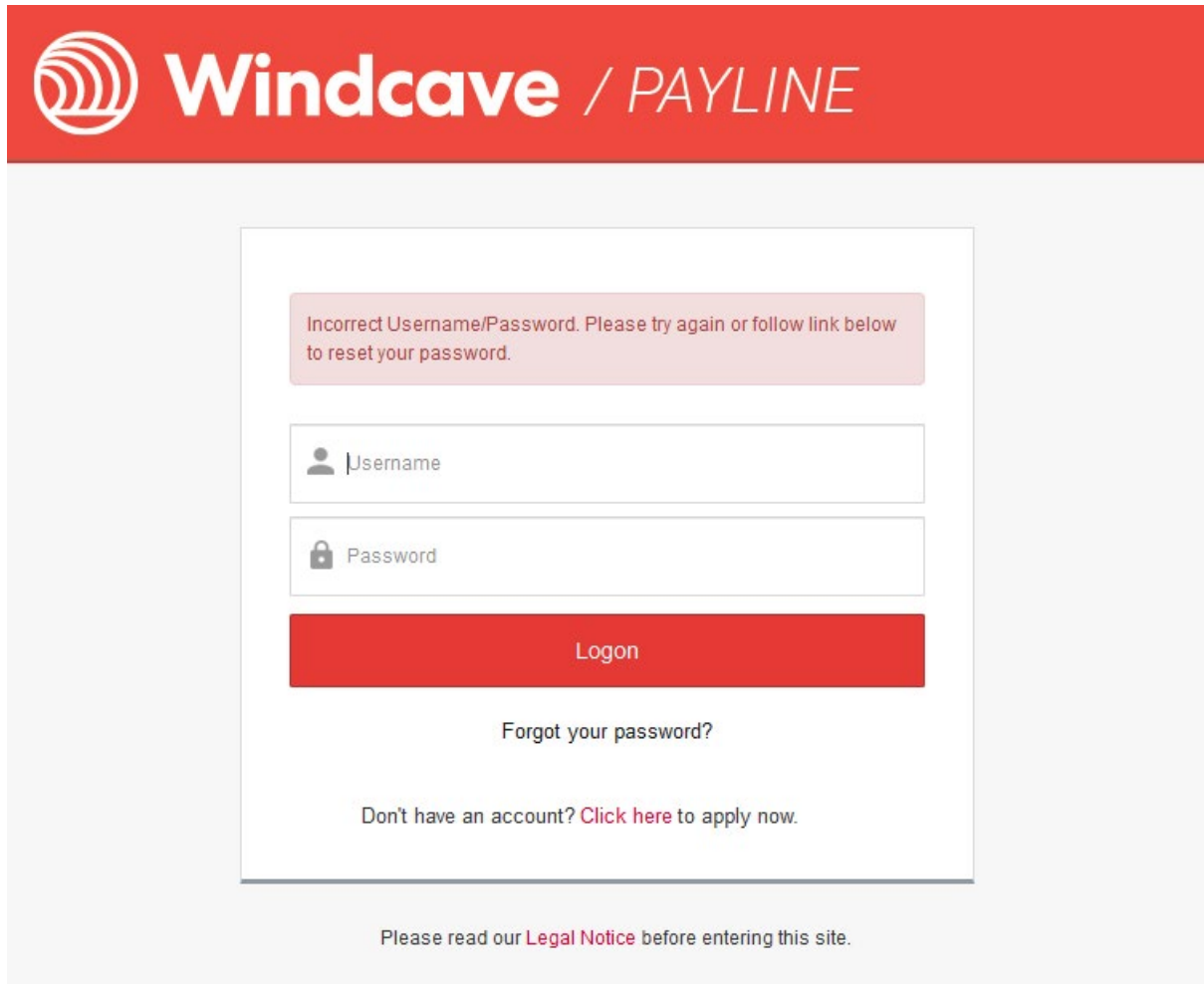
2.1 Login Issues

If an incorrect username or password is entered, the message "Incorrect Username/Password" will be displayed.

You will also be presented with the option to reset your password via the Self-Service Password Reset service (Section 2.2.1). You can access this by clicking on the "Forgot your Password" button.

If the username is correct but the password is incorrect, on the third failed attempt the message "Max log on attempts reached" will be displayed.

The Forgot Password button is still available and can be used to access the Self-Service Password Reset service (Section 2.2.1).

2.2 Reset Payline® Access

2.2.1 Self-Service Password Reset via Registered Email

You can access this service by clicking on the link made available during a login failure message or visit directly using the URL https://sec.windcave.com/pxmi3/forgotpassword.

Please note that a valid email address must be provided during Payline® user setup for this to work.

Once you have filled in your username and email, click submit and a confirmation page will be displayed to advise you that the email have been sent.

Windcave

The email will be sent from NoReply@windcave.com and will contain a link to a secure session for the password reset. Simply enter your new password twice and click submit to complete the process. You will be logged into Payline® once complete.

2.2.2 Windcave Support

If you still experience issues logging into Payline® please contact the Windcave support team via email at support@windcave.com or call directly (https://www.windcave.com/contact.html).

3 View/Search Transactions

3.1 Transaction Search

The transaction search feature allows you to search for all transaction types you have processed. All information is available in real-time.

To search for a transaction, click on "**Transactions**" then "**Transaction Search**" option from the navigation menu. Windcave recommends using the "**Merchant Reference**" field or "**DpsTxnRef**" to search for a specific transaction. You can also choose to view transactions based on a particular date range and various other filters shown in the image below. The filters are defined further in the table below.

Tips:

- You can change the ordering of the transaction list to descending or ascending (by date) by selecting the DateTime toggle.
- You can reset your sort order by selecting the "Reset Sort Order" button on the right-hand side of your screen.
- You can also choose how many transactions are listed on the single page by editing the value in the "Max Rows" drop down menu.
- Copy and paste your "DpsTxnRef" into the corresponding field and hit "Enter" to navigate directly to your specific transaction.
- By selecting a specific transaction, you will be able to "drill" down into the transaction specifics.

Search Parameter	Definition
Group Account	The specific account that a transaction was processed against.
Card Holder	Name of the cardholder.
Merchant Ref	Free text to appear on transaction reports. The merchant reference allows users to easily find and identify the transaction in Payline® transaction query and Windcave reports. The merchant reference is returned in the transaction response, which can be used interpreted by the merchant website. Common uses for the merchant reference field are invoice and order numbers. This is an optional field.
Card Number	The card number used for the transaction. The full credit card number isn't shown; however, the bin range is given (first 6 characters) depending on masking pattern set.
Card Partial 6-4	The partial card number, first 6 and last 4 digits of the card number used to process the transaction.
Card Partial 4	The partial card number, last 4 digits of the card number used to process the transaction.
Card Number2	A token generated by Windcave when adding a card for recurring billing. CardNumber2 is a 16-digit number which conforms to a Luhn "mod 10" algorithm and has a 1-to-1 relationship with the actual card number used.
DeviceId	Merchant defined POS Device ID. Should be set according to Windcave® Host configuration. No default value.
CA Device	Card acceptor device serial number.
CA Station	Card acceptor station name assigned to a specific card acceptor device serial number. Commonly is the same as the card acceptor device serial number.
AuthCode	Authorisation code returned for approved transactions from the acquirer.
TxnRef	Contains a unique, merchant application generated value that uniquely identifies the transaction.

Windcave

User	The user defined in the request initiated against the Windcave host to process a transaction/s.
DpsBillingId	When output, contains the Windcave generated BillingId. Only returned for transactions that are requested by the application with the EnableAddBillCard value is set to true indicating a token billing entry should be created.
DpsTxnRef	Returned for every transaction. If the transaction was approved, DpsTxnRef can be used as input to a Refund transaction. Used to specify a transaction for refund without supplying the original card number and expiry date.

3.1.1 Transaction Search Overview

3.1.2 Search Filters

Use DpsTxnRef to navigate directly to a specific transaction

Reset transaction sort order and clear transaction filters

3.1.3 Transaction Search Results

Date Time Toggle to sort descending/ascending

Max Rows drop down menu

3.2   Transaction Specific Screens

Please note that no sensitive information is made available on any of these screens. Depending on your solution some of the data available in these screens will not be applicable.

3.2.1   Transaction

Provides general information about the details related to the specific transaction.

Key information can be found here such as Authorized result (1 or 0), Amount, Currency, Response Text, Transaction Date/Time, DpsTxnRef.

3.2.2   Merchant Data

Provides general merchant data related to the specific transaction.

Key information found here is Amount, Amount Surcharge, Amount Cash, Amount Tip, Merchant Reference, and TxnData 1-3.

A Merchant receipt can also be generated by entering your merchant email then pressing the "Send merchant receipt" button.

3.2.3 Customer

Contains customer data related to the specific transaction.

Key information found here is Card Number (masked), CardHolder Name, Brand, Shipping information (only present if enabled at the Windcave Host).

A Cardholder receipt can also be generated by entering the cardholders email then pressing the "Send card holder receipt" button.

| Merchant Data | Customer | Risk | Account | Acquirer | Processing | Result | Refund Transactions | FPRN |

Customer

This transaction is not associated to a specific customer, customer related data captured as follows:

Phone Number:	Account Info:
Avs Post Code:	Avs Street Address:
Shipping Name:	
Shipping Address:	Shipping Postal Code:
Shipping Phone Number:	Shipping Country:
Shipping Method:	Shipping Sender Postal Code:
Billing Name:	Billing Address:
Billing Postal Code:	Billing Phone Number:
Billing Country:	Language: en_NZ

Send Card Receipt

Card Holder Email: [   ]

[Send card holder receipt]

Card Info

Stored Card Indicator:	single	CardHolder Name:	SAMPLE CARDHOLDER
Card Number:	360000....08	Card Mac:	4E842EA369160A43
Date Expiry:	12 / 23	Brand:	Diners

Processing

IP Address:	192.168.4.15	User Agent:	DPSDemo; version=TLSv1.2 CP:
IP Country Code:			

3.2.4 Risk

If enabled for risk management this page contains risk management information for this specific transaction.

Key information found here is Risk Score, RM Reason, and Risk Score Text.

Merchant Data	Customer	Risk	Account	Acquirer	Processing	Result	Refund Transactions	FPRN

Rm Reason: Risk Score:

Risk Score Text:

3.2.5 Account

Contains information about the merchant account for this specific transaction.

Key information here is Username, Group Name, Group Account Name, Caid, and Catid.

Merchant Data	Customer	Risk	Account	Acquirer	Processing	Result	Refund Transactions	FPRN

Username:	Post_DocumentSample	Group Name:	DocumentSample
Group Account Name:	TestMerchant	Customer Name:	WINDCAVE
Product Name:		Acquirer Name:	Undefined
Caid:	10000000	Catid:	10012379
Association Id:	0	Association Name:	
Authentication Type Id:	0	Authentication Type Name:	None

3.2.6 Acquirer

Contains information about the acquirer for this specific transaction.

Key information here is Stan, Acquirer ReCo, and Acquirer Response Text.

Merchant Data	Customer	Risk	Account	Acquirer	Processing	Result	Refund Transactions	FPRN

Liability Indicator Name:	Standard	Acquirer Date Time:	30/12/2019 08:36:43
Host Id (NII):	9997	Stan:	122506
Acquirer ReCo:	00	Acquirer Host Name:	DPS Host Simulator
Acquirer Response Text:	APPROVED		

3.2.7 Processing

Contains information about how the specific transaction was processed.

Key information contained here is PAN Entry Mode, Void ReCo, Void DateTime, Elapsed (ms), Acquirer Host Elapsed (ms).

| Merchant Data | Customer | Risk | Account | Acquirer | **Processing** | Result | Refund Transactions | FPRN |

Client Type:	I		Client Type Name:	Internet
Product Code:			PAN Entry Mode:	Unknown
Void ReCo:			Void DateTime (NZT):	Invalid

Route

IP Address:	192.168.4.15	Location Name:	
Client Version:		Server:	PXPOST
Server Name:	ENDTXN	Server IP:	
Applet Type:	PXPost	Applet Version:	2.0.0.8
SlotId:	12379	PxHost Id:	11
Transaction Id:	1533674946	Acquirer Host Name:	DPS Host Simulator
Host Id (NII):	9997		

Timing

Perimeter Elapsed (ms):		Elapsed (ms):	32
Acquirer Host Elapsed (ms):	16		

3.2.8 Result

Contains information about the result of this specific transaction.

Key information contained here is Authorized, ReCo, Response Text, Acquirer ReCo, Acquirer Response Text, Auth Code, Stan, Cvc2 Result Code, and Date Settlement.

| Merchant Data | Customer | Risk | Account | Acquirer | Processing | **Result** | Refund Transactions | FPRN |

Authorized:	1		ReCo:	00
Response Text:	APPROVED		Acquirer ReCo:	00
Acquirer Response Text:	APPROVED		Auth Code:	083643
Stan:	122506		ReCoPreProc:	
Avs Result:	Undefined		Cvc2 Result Code:	NotUsed
Date Settlement:	30/12/2019		Acquirer Date Time:	30/12/2019 08:36:43
Liability Indicator Name:	Standard			

Version: 1.2

Windcave

3.2.9 Refund Transactions

Used to refund this specific transaction.

Transaction

DpsTxnRef:	0000000b5b71d84d	TxnRef:	
Transaction Date (NZT):	30/12/2019 11:43:01	Txn Type:	Complete
Payment Method:	Card	Authorized:	1
ReCo:	00	Response Text:	APPROVED
Total Amount:	100.00 (NZD)	IP Address:	192.168.102.81

Merchant Data	Customer	Account	Acquirer	Processing	Result	Refund Transactions	FPRN

RxDate	Amount	MerchantReference
30/12/2019 14:32:34	10.00 (NZD)	Document Sample
30/12/2019 14:32:27	20.00 (NZD)	Document Sample

Page Number: 1   0.016 seconds

Refund

3.2.10 FPRN

Shows Fail Proof Result Notification details if used for this specific transaction.

Merchant Data	Customer	Account	Acquirer	Processing	Result	Refund Transactions	FPRN

Log

Start Date	Elapsed(ms)	Attempts	Status Code	Success
30/12/2019 14:35:51	2656	1	200	1

Page Number: 1   0.000 seconds

Windcave

4 Reporting

Using Payline®, merchants can process "on demand" reports. Most reports are available in both PDF/CSV formats and can be downloaded.

Merchants can also process reports specific to date ranges and transaction types.

The reports screen can be accessed by clicking the "Reports" option in the navigation menu.

- All available report types will be displayed at the top under "Matching Reports".
- Any reports that are ready for viewing/download can be found under "Ready Reports". Simply click the report to view/download.
- Any reports that are currently being processed will be shown under "Pending Reports".

Tip: The page does not dynamically update so use the "Refresh" button to refresh the page (e.g., if you are waiting for a report in the pending report list, hit the refresh button after some time and if complete it will move to the ready report list).

Search Reports

Report: [   ]

[🔍 Search]   [✕ Clear Filters]

Matching Reports - Click to Generate

Name	Description
Standard (Settlement Date)	List of transactions with card and purchase details in order of their settlement date.
Standard	Information about card details, reference number, purchase.
Full Transactions	Description of the purchase, card, billing and transaction data.
Full Txns By Settlement	Full Txns By Settlement

Page Number: 1   0.000 seconds

[⟳ Refresh]

Ready Reports

Name	Type	Date	OutputFormat
No results found.			

Page Number: 1   0.016 seconds

Batch Reports

Name	Date
Sample.csv	30/12/2019 13:06

Page Number: 1   0.000 seconds

Pending Reports

Name	Type	Queue Date-Time	Status	Status Detail
No results found.				

Page Number: 1   0.031 seconds

Windcave

4.1 Generate Report

To generate a report simply click on the report type you wish to create, and you will be presented with the available options for that particular report. Fill in the required fields and click "Add" to start generating the report. You will be redirected back to the main report screen automatically.

Generate Report

Title:				
Name:	Standard (Settlement Date)		Username:	DocumentSample
Email Report	☐		Email:	support@windcave.com
Format:	CSV ∨		Authorized:	Authorized ∨
Start Date (NZT):	30 ∨ DEC ∨ 2019 ∨ 00 ∨ 00 ∨		End Date (NZT):	31 ∨ DEC ∨ 2019 ∨ 00 ∨ 00 ∨
Purch	☑			
Auth	☑		Complete	☑
Refund	☑		X (void)	☑
F (AdviceEOV)	☑			

⊕ Add   ✕ Cancel   ↻ Reset

4.2 Configurable Parameters

Dependent on the report type that you run there can be a number of different configurable parameters to define the specific data that you want to extract. The table below is and defines the general parameters you will see when you come to run a report.

Parameter	Definition
Title	Free text field to enter a meaningful report name or reference.
Name	Name of the report selected i.e., Standard, Standard (Settlement Date).
Username	Payline® username currently logged in.
Email Report	Tick if you wish to have the report emailed (otherwise you can simply download).
Email	Email address to email report to.
Start Date	The start date from which you would like to report on. Enter dates in DD/MM/YYYY format. You can also enter specific times you want to report on in the corresponding fields. By default, this is set to 00:00 (HH:MM).
End Date	The end date for which the report will be generated for. Enter dates in DD/MM/YYYY format. You can also enter specific times you want to report on in the corresponding fields. By default, this is set to 00:00 (HH:MM).
Group	The Group.
Group Account	The Group Account (leave blank if you wish to generate report for all Group Accounts under the Group.
Purch Auth Complete Refund	Transaction types that you wish to have defined in your report.

Version: 1.2

Windcave

5 Password Management

Windcave recommend that you change your password periodically and that you do not store this in an easily accessible location.

To reset your password, click on "Change Password" on the navigation menu.

You will be prompted to enter your current (old) password and new password twice. Be aware that passwords are case sensitive and that your password must contain at least 8 characters and contain at least one character from three of the categories listed.

Change Password

Your password must be between 8-32 characters.

It should contain at least one character from three of the following categories,

1. upper case(A-Z)

2. lower case(a-z)

3. numerical characters(0-9)

4. symbol(non numerical, non alpha)

Current Password:

New Password:

Confirm:

↻ OK

You will be prompted with the following message once the password reset has been completed.

Change Password Result

Password change was successful.

Note: For security reasons, Windcave will force a password reset every 90 days. A similar screen will be displayed upon login if the password has not been reset after the 90-day period.

6   Processing Transactions

6.1   Processing a Purchase

Click on the "Transactions" then "Purchase" menu items. Enter details of the credit card you would like to process the transaction for and click "Submit". Once you have clicked the Submit button, it will return a response. This response includes an authorisation code, which is unique for every transaction.

6.1.1   Purchase Request

Parameter	Definition
Merchant Reference	Free text field. Enter any meaningful reference. Commonly used for transaction tracking and reconciliation. This field is only seen by you (the merchant), not your customer (the card holder).
Amount	The amount you wish to bill the card for.
Card Number	The credit card number of the card holder.
Card Holder Name	The name on the credit card.
Expiry Date	The expiry date of the credit card in MM / YY (month / year) format.
Card Security Code	The non-embossed "security number" (3 digits for Visa / MasterCard, 4 digits for American Express). Please check with your bank if they support this feature.
Save as Bill Card	When ticked a Windcave Token will be created, this token can be used to rebill this particular card.
Card Holder Email	Email address of the customer.
TxnData1/2/3	The TxnData fields are free text fields that can be used to store information against a transaction.

Version: 1.2

Windcave

6.1.2 Purchase Response

Transaction Result

Merchant Reference:	Document Test	Order Line 1:	Document
Order Line 2:	Sample	Merchant Date:	2019/12/30 10:46:16 NZT
User Date:	2019/12/30 10:46:16 NZT	Response:	APPROVED
ReCo:	00	Help Text:	Transaction Approved
Amount:	1.00 (NZD)	Authorization Code:	104616
DpsTxnRef:	0000000b5b6ec447		

Perform Another Transaction

Select to return to purchase screen to perform another transaction

6.2 Processing a Refund

Using tools provided by Windcave, the merchant can process refunds to credit card holders without needing their customer's credit card information. Simply by searching for the initially approved transaction, the merchant can process refunds as many times as required, up to but no more than the original purchase amount. To process a refund, click on the "Transactions" then "Transaction Search" menu items. You can search for the transaction either by searching date ranges, the merchant reference or full credit card number. To refund a transaction, click on the corresponding "transaction" you wish to refund. Select the "Refund Transactions" tab, then press the "Refund" button. You will now be presented with the screen to enter your refund parameters.

6.2.1 Refund Request

Enter your Payline® user password.

Enter a merchant reference and the amount you wish to process the refund for and click "Submit". The transaction will be processed, and you will receive a response. This response also includes an authorization code, which is unique to every transaction. If you are processing a refund for a credit card that is expired (where the card holder has retained the same credit card number), enter in the new expiry date in the "Expiry Date" field.

Refund Transaction To Card

DpsTxnRef:	0000000b5b6a05c2
Original Amount:	23.18 (NZD)
Amount Refunded:	0.00 (NZD)
Amount Refundable:	23.18 (NZD)
Card Holder Name:	SAMPLE CARDHOLDER
Card Number:	360000....08
Date (NZT):	30/12/2019 08:36:43
Transaction Type:	Purchase

Amount:*	10 . 00
Expiry Date:	12 ∨ 23 ∨
Card Holder Email:	
Merchant Reference:	Refund
User Password:*	

⊕ Submit   **✕ Cancel**   **↻ Reset**

Version: 1.2

Windcave

6.2.2 Refund Response

Refund Result

Merchant Date:	2019/12/30 11:07:24 NZT	User Date:	2019/12/30 11:07:24 NZT
Response:	APPROVED	ReCo:	00
Help Text:	Transaction Approved	Amount:	10.00 (NZD)
Authorization Code:	110724	DpsTxnRef:	0000000b5b6fe4d6

<div style="text-align:center">

← Perform Another Transaction

</div>

Refund Result

Merchant Date:	2019/12/30 11:36:12 NZT		User Date:	2019/12/30 11:36:12 NZT
Response:	ALREADY REFUNDED		ReCo:	J5
Help Text:	The transaction has already been fully refunded. A transaction cannot be refunded for more than the original amount.	Amount:	13.18 (NZD)
DpsTxnRef:	0000000b5b7176a2			

← Perform Another Transaction

Important Notes:

- Most banks also set a "daily refund limit" for each merchant. If you are a processing a relatively large refund and experience difficulties with them returning "declined", contact your bank to find out what your daily refund limit is.
- You can refund a transaction more than once. You can submit multiple refunds up until the value of the original transaction. For example, if a transaction is processed for $90 you can submit any number of refunds up until the $90 mark – this could equate to 3 $30 refunds.
- If you are processing a refund and feel that you have entered all the fields above correctly but continue to get a "declined" transaction response, it may be that you are currently not configured by your bank for "refund" transaction types. Contact the merchant services department at your bank to enable this function. Alternatively, please contact support@windcave.com for more information.

Version: 1.2

Windcave

6.3 Processing a Auth

This option/section is only applicable to merchants that adopt the preauthorization / completion model. Users can authorise transactions by clicking on the "Transactions" then the "Auth" menu items. Enter in the required information and click "Submit". The transaction will be processed, and you will be presented with a response.

6.3.1 Auth Request

Parameter	Definition
Merchant Reference	Free text field. Enter any meaningful reference. Commonly used for transaction tracking and reconciliation. This field is only seen by you (the merchant), not your customer (the cardholder).
Amount	The amount you wish to Authorize the card for.
Card Number	The credit card number of the card holder.
Card Holder Name	The name on the credit card.
Expiry Date	The expiry date of the credit card in MM / YY (month / year) format.
Card Security Code	The non-embossed "security number" (3 digits for Visa / MasterCard, 4 digits for American Express). Please check with your bank if they support this feature.
Save as Bill Card	When ticked a Windcave Token will be created, this token can be used to rebill this particular card.
Card Holder Email	Email address of the customer.
TxnData1/2/3	The TxnData fields are free text fields that can be used to store information against a transaction.

6.3.2 Auth Response

Transaction Result

Merchant Date:	2019/12/30 11:41:21 NZT	User Date:	2019/12/30 11:41:21 NZT
Response:	APPROVED	ReCo:	00
Help Text:	Transaction Approved	Amount:	100.00 (NZD)
Authorization Code:	114121	DpsTxnRef:	0000000b5b71c049

Perform Another Transaction

6.4 Processing a Complete

Users can complete transactions, by clicking on the "Transactions" then "Transaction Search" menu items. Merchants can search for a previously authorised transaction either by merchant reference, card number, card holder name or by date range.

Select the transaction you would like to process a complete for, then on the "Complete Transactions" tab press the "Complete" button.

Enter a merchant reference, followed by the amount you would like to complete the transaction for, and click on "Submit". You will be presented with a response page once the transaction has been processed. This response includes a unique authorisation code.

Important: You can only complete a single transaction once for the value of or less than the original authorisation.

6.4.1 Complete Request

Completion

DpsTxnRef:	0000000b5b71c049
Merchant Reference:*	
Amount:	100 . 00 (NZD)
Card Number:	411111....11
Card Holder Name:	DOCUMENT SAMPLE
Card Holder Email:	

⊕ Submit   ✕ Cancel   ↻ Reset

Windcave

6.4.2 Complete Response

Complete Result

Merchant Date:	2019/12/30 11:43:01 NZT	User Date:	2019/12/30 11:43:01 NZT
Response:	APPROVED	ReCo:	00
Help Text:	Transaction Approved	Amount:	100.00 (NZD)
Authorization Code:	114121	DpsTxnRef:	0000000b5b71d84d

← Back

Windcave

7 Batch Upload

The Batch Processor is an online automation client that allows merchants to process large volumes of credit cards quickly and easily simply by uploading a CSV (comma separated values) file. For more information on configuring this CSV file, please refer to the Technical Resources pages on our website www.windcave.com.

Once you have set up this CSV file, click on "Other" then "Batch Upload" option from the menu items. Click on "Choose File" to select the file you wish to upload and then on "Upload Batch" to upload this file. Please note Windcave provide a solution to automate this upload function, please contact Windcave via email to discuss the Batch Processor on sales@windcave.com.

Once this file has been uploaded successfully, you will receive a confirmation message and a response batch file will appear under the "Reports" tab.

7.1 Batch File Settings

Billing ID is an identifier supplied to the merchant to identify a customer or billing entry and can be used instead of a card number and date expiry for substitute transactions.

To learn how to correctly set up your Batch File Settings please refer to the Technical Resources pages on our website www.windcave.com.

8 Recurring Billing

Payline® allows merchants to automate recurring transactions quickly, simply and most importantly securely eliminating the need to store sensitive credit card data. If this is not available on your account, please contact sales@windcave.com to enable this functionality.

8.1 Adding Cards

In order to establish automated billing on a card it needs to be added to the Payline® Billing Vault. This is done by clicking on "Bill Cards" from the menu. To add a new card, click "Add" you can find this near the bottom left.

Parameter	Description
Billing Id	Billing ID that the first and subsequent transactions are referred to as.
Card Number	The credit card number of the card holder.
Card Holder	The embossed name on the credit card.
Merchant Reference	Free text field. Enter any meaningful reference. Commonly used for transaction tracking and reconciliation.
Enabled	Check to make the billing card live.
BillingId is Unique	Check to indicate the BillingId is a unique value.
Date Expiry	Expiry date of the credit card.
Issue Number	If card has an issue number, it can be entered here.

Windcave

8.2 Charging a Bill Card

Once you have completed the steps outlined above to add the card, you can search for the card that you have just added by selecting the "Billing Cards" option from the menu. You can search for Bill Cards based on a variety of fields. Windcave recommend you using the DpsBillingId. You can enter the DpsBillingId you wish to charge and press the "Enter" key on your keyboard to automatically locate you bill card.

You can also use merchant reference field and / or the billing ID of the transaction for this purpose. Once you have entered in this information, click "Search". One you have found and /or selected the bill card you want to charge you can proceed to initiate a transaction by pressing the "Charge" button.

Bill Card

DpsBillingId:	0000110391353045	Billing Id:	
Card Holder:*	Document Sample	Merchant Reference:	
Enabled	✔	BillingId Is Unique	☐
Card #:	411111....11	Date Expiry (mmyy):*	12 ⌄ 23 ⌄
Issue Number:		Create Date (NZT):	30/12/2019 13:25:47
Last Update (NZT):	Invalid	Last Known As Valid (NZT):	Invalid

Charge

↻ Update **🗑 Delete** **✕ Cancel** **↻ Reset**

Associated Recurring Transactions

Group Account	Amount	Start Amount	Currency	Cycle	Txn Count	Recurring Count	Start Date	Next Cycle	Time Zone
No results found.									

Page Number: 1   0.000 seconds

⊕ Add

Charge Bill Card (one-off charge)

Make a Transaction

DpsBillingId:	0000110391353045		
BillingId:		Stored Card Indicator:	⌄
Merchant Reference:		Card Number:	411111....11
Amount:*	NZD$ 0 . 00	Cardholder Name:	Document Sample
Expiry Date:	12 / 23		

⊕ Add **✕ Cancel** **↻ Reset**

You will be presented with a screen to specify the amount of the "one off charge". Once you have done this click "Submit" and a transaction will be initiated against the bill card and will be displayed in the "Transaction Search" menu.

Windcave

Transaction Result

Merchant Date:	2019/12/30 13:34:18 NZT	User Date:	2019/12/30 13:34:18 NZT
Response:	APPROVED	ReCo:	00
Help Text:	Transaction Approved	Amount:	1.00 (NZD)
Authorization Code:	133418	DpsBillingId:	0000110391353045
DpsTxnRef:	0000000b5b786f5a		

<div style="text-align:center">

Perform Another Transaction

</div>

✕ Cancel

Important Note: From the "BillCard" screen you can "Update" and "Delete" an existing BillCard. If you are updating and there is not an existing BillingId you will be asked to provide one before any details can be updated.

8.3   Setting up Recurring Billing

Using the same process as above to search for and find a bill card, once you have found the card you can also set up recurring payments. This means you can automatically configure the bill card to be charged for a specific amount, for a specified frequency and for a specified duration among other configuration parameters explained below. To add recurring transactions, select "Add" from the BillCard screen.

Bill Card

DpsBillingId:	0000110391353045	Billing Id:	
Card Holder:*	Document Sample	Merchant Reference:	
Enabled	✔	BillingId Is Unique	☐
Card #:	411111....11	Date Expiry (mmyy):*	12 ⌄ 23 ⌄
Issue Number:		Create Date (NZT):	30/12/2019 13:25:47
Last Update (NZT):	Invalid	Last Known As Valid (NZT):	Invalid

Charge

↻ Update   **🗑 Delete**   **✕ Cancel**   **↻ Reset**

Associated Recurring Transactions

Group Account	Amount	Start Amount	Currency	Cycle	Txn Count	Recurring Count	Start Date	Next Cycle	Time Zone
No results found.									

Page Number: 1   0.016 seconds

⊕ Add   Select to add recurring billing to a bill card in the billing vault

Windcave

Recurring Transaction

BillingId:	Card Holder: Document Sample
Card Number: 411111....11	Enabled ✔
Amount:* [0].[00]	Start Amount [0].[00]
Currency:* [▼]	Cycle: [Daily ▼]
Recurring Count: [ ]	Start Date (): [30 ▼] [DEC ▼] [2019 ▼] [13 ▼] [39 ▼]
Time Zone: [NZT ▼]	Merchant Reference: [ ]

⊕ Add   ✕ Cancel   ⟳ Reset

Parameter	Description
BillingId	Billing ID that the first and subsequent transactions are referred to as.
Card Holder	The embossed name on the credit card.
Card Number	The masked credit card number of the card holder.
Enabled	This checkbox must be ticked to enable recurring payments.
Amount	The amount to be re-billed.
Start Amount	The merchant can bill an initial amount to the card (e.g., deposit amount). This payment will only be applicable for the first payment. Subsequent transactions will be billed based on the amount field above.
Currency	The currency you would like to bill the customer in (only applicable to customers that currently have multi-currency options enabled).
Cycle	The frequency of the recurring payments.
Recurring Count	The number of instances the card holder will be billed.
Start Date	The date from which the initial recurring payment will commence.
Time Zone	The time zone that you want the billing card to be charged in.
Merchant Reference	Free text field. Enter any meaningful reference. Commonly used for transaction tracking and reconciliation.

Bill Card

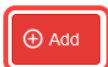|	
DpsBillingId: 0000110391353045	Billing Id: [ ]
Card Holder:* [Document Sample]	Merchant Reference: [ ]
Enabled ✔	BillingId Is Unique ☐
Card #: 411111....11	Date Expiry (mmyy):* [12 ▼] [23 ▼]
Issue Number: [ ]	Create Date (NZT): 30/12/2019 13:25:47
Last Update (NZT): Invalid	Last Known As Valid (NZT): Invalid

Charge

⟳ Update   🗑 Delete   ✕ Cancel   ⟳ Reset

Associated Recurring Transactions

Group Account	Amount	Start Amount	Currency	Cycle	Txn Count	Recurring Count	Start Date	Next Cycle	Time Zone
TestMerchant	10.00	10.00	NZD	Daily	0	10	30/12/2019 14:15	30/12/2019 14:15	NZT

Page Number: 1   0.016 seconds

⊕ Add

Version: 1.2

Windcave

9   Privileges

9.1   Customer Account Privileges

9.1.1   My Account

View account details with Windcave, for further details please contact sales@windcave.com.

9.2   User Privileges

9.2.1   Change Password

Change password for current Payline® user ID.

9.2.2   My User

Change current Payline® user details such as Date Format, Time Zone, Time Format, Full Name, Email, and SMS Number.

9.3   Transaction Privileges

9.3.1   Purchase

Process "Purchase" type transactions manually via Payline®.

9.3.2   Auth

Process "Auth" type transactions manually via Payline®.

9.3.3   Complete

Process "Complete" type transactions manually via Payline®. Completes can only be processed on approved Auth transactions.

9.3.4   Refund

Process "Refund" type transactions manually via Payline®. Refunds can only be processed on approved Purchase and Complete transactions.

9.3.5   Transaction Search

Search for transactions and view transaction details in real-time.

9.4   Token Billing Privileges

9.4.1   Bill Cards

Search, view and manage tokens currently stored.

9.4.2 Recurring Billing

Setup a recurring transaction to be charged automatically.

9.5 Batch Privileges

9.5.1 Batch Upload

Allows access to upload batch transaction files for processing.

9.5.2 Batch Settings

Allows access to configure batch file upload settings.

9.6 Hosted Payments Page Privileges

9.6.1 HPP Customisation

Allows access to customise and preview styling of hosted payments page.