NAB Trade Finance Online

Quick Reference Guide
Closing a Form

Use: At the top and bottom of every form, there are numerous options to close the form.

This quick reference guide outlines the ways that you can close a form and the status of the form depending on what method you use.
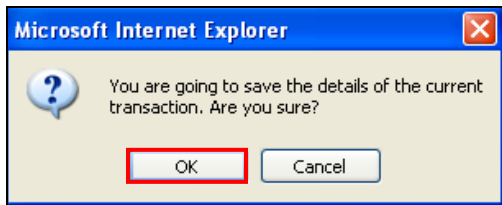

Options:

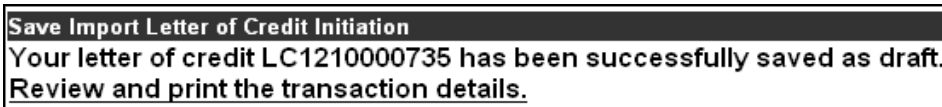| 1	Save
2	Submit
3	Template
4	Cancel

1	Save

Saving a form allows you to save the form without submitting it so that you or another user can retrieve the form and continue to populate it.

1.1   **Click** the **Save** button. The save confirmation popup window displays.

1.2   **Click** the **OK** button. The Save message displays. You can now log off the system or continue with another task.

Note: If a form had an attachment when it was saved, the attachment is removed, and will need to be added again before the submit action is performed.

The saved form now has the status of incomplete and can be opened using the retrieve draft function. It is also considered pending and can be opened using the Pending option from the relevant product type menu. Refer to step 5 for more information.
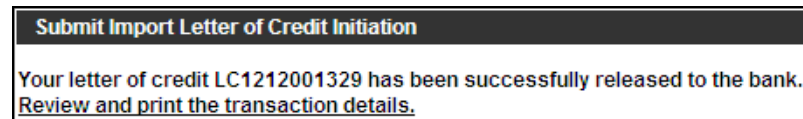
2	Submit

When you have completed a form you can submit it.

2.1   **Click** the **Submit** button. The Attempt submission popup window displays.
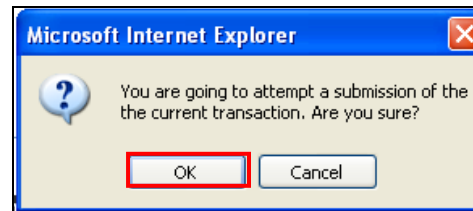
2.2   **Click** the **OK** button. The Submit confirmation screen displays.

The form now has the status of submitted and is awaiting action from the Bank. If you wish to retrieve the request to view the details you can search for it from the Pending menu within the relevant product type. Refer to step 5 for more information.

Note: When you have insufficient authorisation to submit a form, you will receive an insufficient privileges message similar to the following. It will change depending on the form you try to submit.
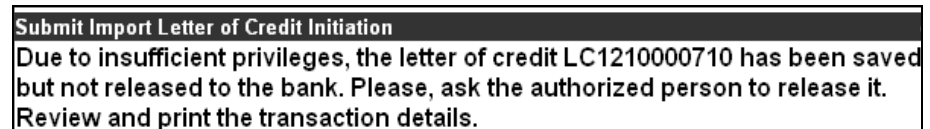
There are a few reasons that you may not have sufficient authorisation:

- You are a NAB Connect general user and are not permitted to authorise any transactions.
- Your role is not authorised to submit for the amount of the transaction or the product type you are attempting to submit.
- The transaction type you are attempting to submit requires more than one role to validate.

When you receive this type of message, your form saves automatically. The transaction has the status of uncontrolled and can be retrieved using the retrieve unsigned function. Only a person with sufficient authorisation can submit it. It is also considered pending and can be viewed using the Pending option from the relevant product type menu. Refer to step 5 for more information.

3 **Template**

You can create a template from an existing form so you don't have to re-enter common details.

| Save | Submit | **Template** | Cancel | Help |

General Details	
System Id:	LC1212001324
Template Id:	Basic LC

3.1 **Click** the **Template** button. The save as template confirmation popup displays.

Note: The Template ID field is mandatory when you are creating a template. Make this field as meaningful and logical as possible so that you can easily identify your template from the list of templates.

Microsoft Internet Explorer

You are going to save the details of the transaction as a template. Are you sure?
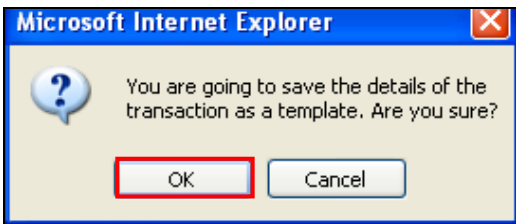
OK   Cancel

3.2 **Click** the **OK** button. The Save Import Letter of Credit As Template screen

Save Import Letter of Credit As Template
Your template LC 2323232 has been successfully saved.

The saved template is now available to be used by selecting the From Template function.

4 **Cancel**

| Save | Submit | Template | **Cancel** | Help |

Use the Cancel option when you don't want to save any details that you have entered in a form.

4.1 **Click** the **Cancel** button. The leaving current page confirmation popup displays.

Microsoft Internet Explorer

You are going to leave the current page. Are you sure?
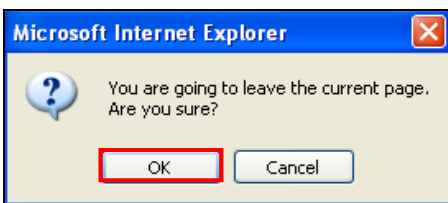
OK   Cancel

- **Click** the **OK** button. The main menu displays. If you cancel a form without saving, the form details will be deleted.
- If the form has been saved, cancelling the form will delete the changes that have been made after the last save.

5 **Pending records**

The following table outlines the status of pending records and where they can be accessed from.

Status	Meaning	Location
Incomplete	Saved but no attempt has been made to submit the draft	• Last pending transactions list from the homepage • Retrieve draft • Pending (product type) • Pending (reports menu)
Uncontrolled	When a user attempted the Submit action but did not have sufficient authorization to send transaction to the bank .	• Last pending transactions list from the homepage • Retrieve unsigned • Pending (product type) • Pending (reports menu)
Submitted	When the transaction record has been submitted to the Bank but has not yet been actioned by the Bank	• Pending (product type) • Pending (reports menu)

When you use the Pending (product) option to locate files there will be at least one icon beside the system ID. Clicking on the icon will open the transaction in the mode related to the button.

	System Id	Entity	Type	Status	
✎🔒	LC1211001319	Giri2	New	Uncontrolled	Tes
📋	LC1211001314		New	Submitted	INF
✎🔒	LC1211001313	Entity2	New	Uncontrolled	Uni

Icon	Meaning
✎	Opens the record in edit mode so you can change or add details. This icon will display for incomplete and unsigned transactions.
📋	Opens a popup window displaying the event details of the record. This icon will display for submitted transactions so you can review what has been sent
🔒	Opens the transaction in a non-editable mode, this icon displays for uncontrolled transactions, you can submit from this mode provided you have sufficient authorization.