# NAB CONNECT
## *Quick Reference Guide*

more than money

nab

## Create a 'Pay multiple' payment

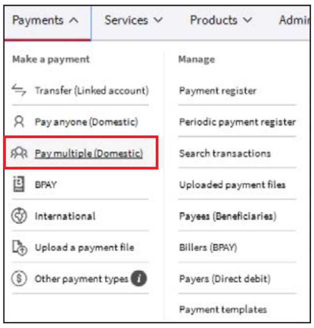
This quick reference guide outlines how to create a payment to multiple accounts within Australia. These can be accounts held by a single payee or accounts held by multiple payees. The payment can be classified as urgent (processed within two hours of being authorised) or regular (settled by the next business day). Login to NAB Connect to get started.

## HOW TO

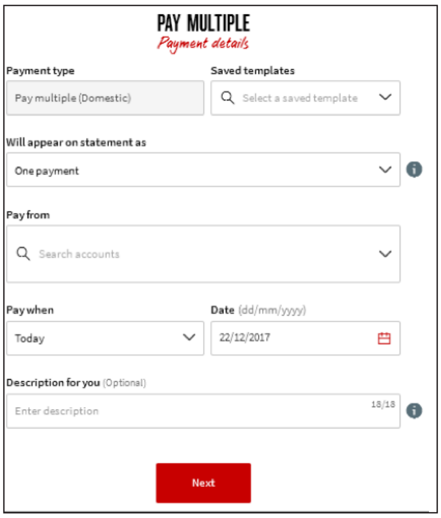
1. **Select Pay multiple (Domestic)**
2. **Enter payment details**
3. **Select multiple accounts/payees**
4. **Create or edit a payee**
5. **Submit payment for authorisation**

### 1 Select Pay multiple (Domestic)

Click **Payments** then under **Make a payment**, select **Pay multiple (Domestic)**.

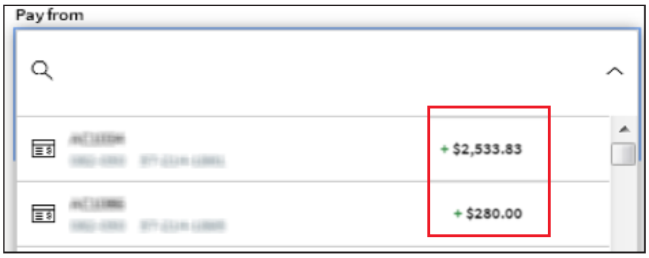



The *PAY MULTIPLE>PAYMENT DETAILS* screen displays:




### 2 Enter payment details

1. **Payment type** is already set to **Pay multiple (Domestic)**
2. If you have set up a template, at **Saved templates**, click the dropdown arrow and select a template (the template will populate most of the Payment details for you – refer to *5: Submit payment for authorisation*)
3. At **Will appear on statement as**, click the dropdown arrow and choose whether the payment will appear as one payment or multiple payments on **your** statement.
4. At **Pay from**, click the dropdown arrow and select the account you wish to pay from. (If 20 or less accounts are displayed, the current account balance is provided.)



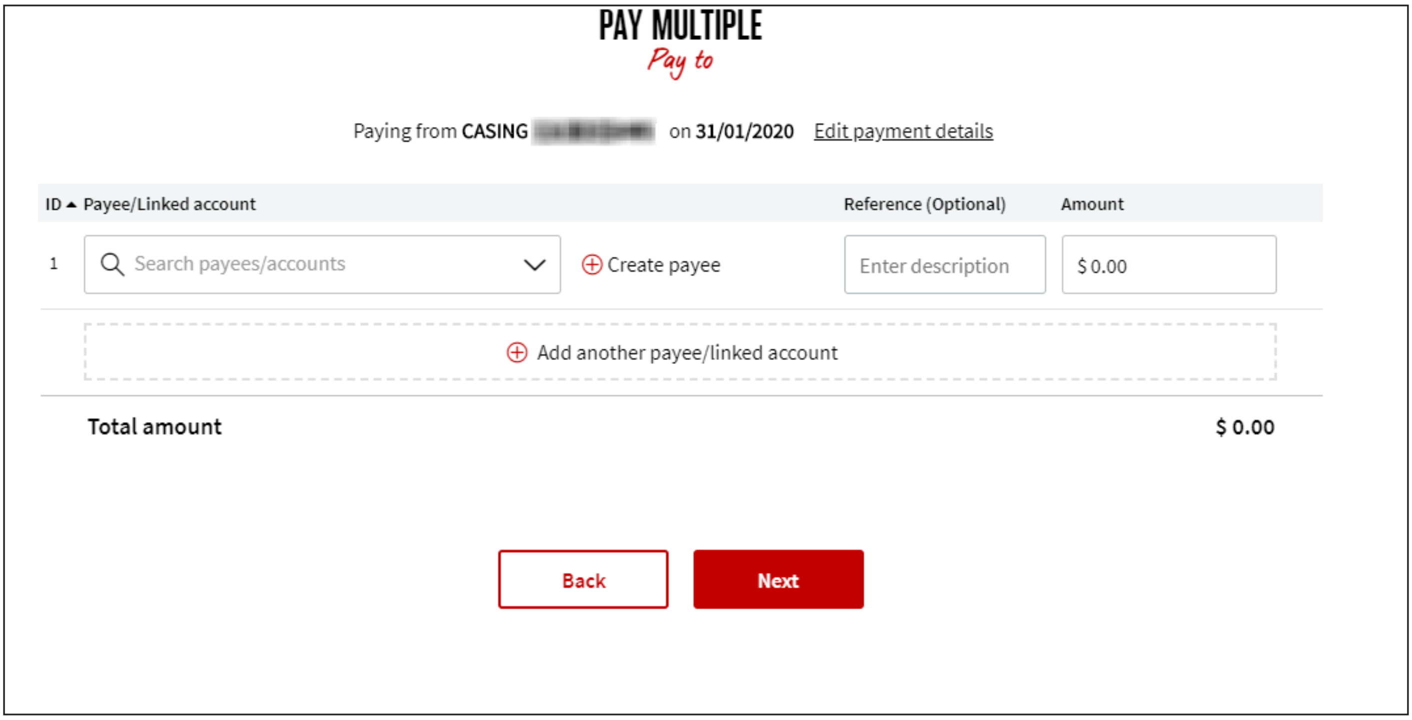

5. At **Pay when** you can change the payment date from the default '**Today**' to a later date. You can also create a periodic payment on a weekly, fortnightly monthly or quarterly basis. Click the drop down arrow next to **Today** to change to a later date or periodic payment. You can use the calendar in the **Date** field to select the date.

**Note:** Payments can be made up to 90 days in advance.

6. Click **Next**. The **Pay multiple** screen displays.

## 3 Select multiple payees

The **Pay Multiple/Pay** to screen is where you enter payee details.




1. At **Search payee**, click the dropdown arrow to find the first payee. If the payee is not listed, you may wish to click ⊕ Create payee

   Tip: For instructions, see 4: Create or edit a payee
2. Select the payee.
3. At **Reference** and **Description for you** fields, add descriptions for yourself and for the payee. Descriptions for payees will appear on their statements, descriptions for you will appear on your statement.

   (If you wish, you can add further information for the payee by clicking **Additional information for payee** and entering further free-format text)
4. In the **Amount** field, enter the payment amount for this payee.
5. Click ⊕ Add another payee and repeat steps 1-4 for all other payees included in this multi payment. delete a payee from this payment, click **X** on the far right.

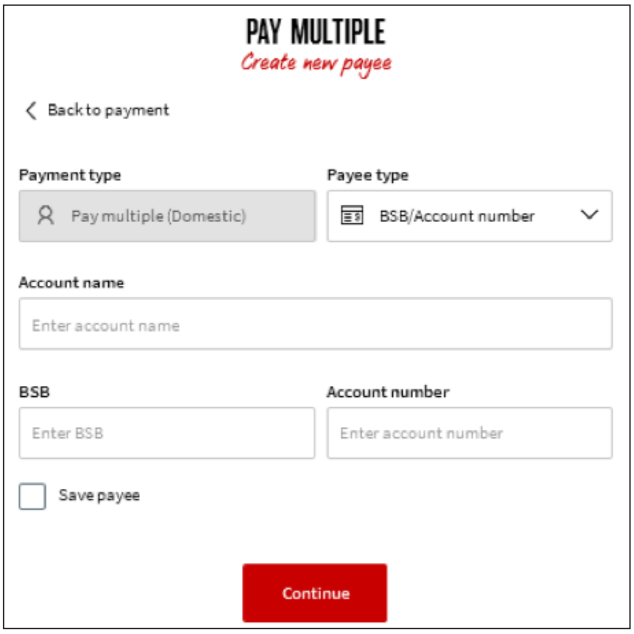
   Note: The **Total amount** is calculated at the bottom of the screen
6. Click **Next**. The payment is ready for confirming and submitting for authorisation. (Refer to 4: Submit payment for authorisation)

## 4 Create or edit a payee

You can create a new payee or edit an existing payee while creating a Pay multiple (Domestic) payment.

**To create a new payee:**

1. Click ⊕ Create payee The **Create new payee** page displays:




2. Complete the fields.

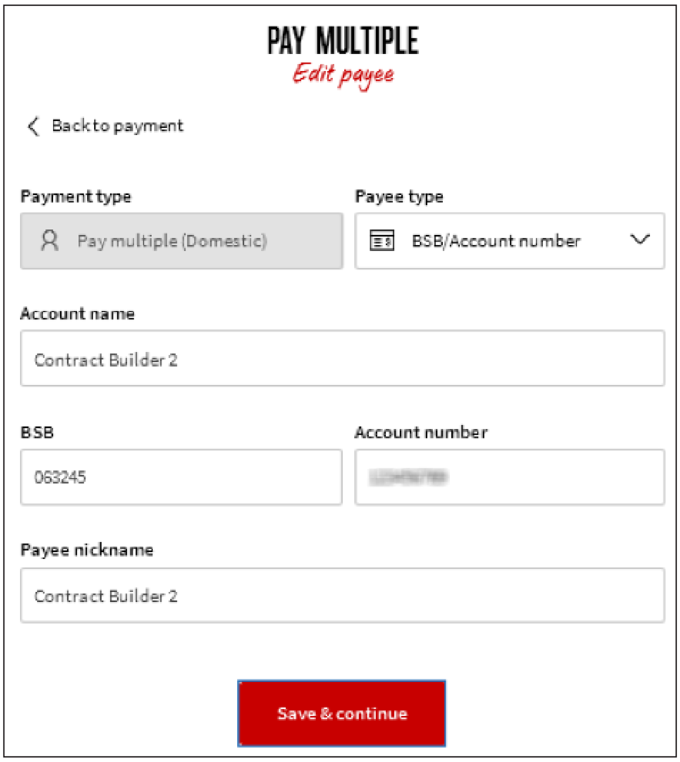
3. Check **Save payee** to save the details for future use.
4. Click **Save & Continue** to use the new payee in your multi payment. You may receive a prompt to check the details before being returned to the Pay to page.

   (Click Back to payment to cancel and go back at any stage.)

**To edit a payee:**

This option appears on the **Pay To** page whenever you select a saved payee.

1. Click Edit payee The **Edit payee** page displays:

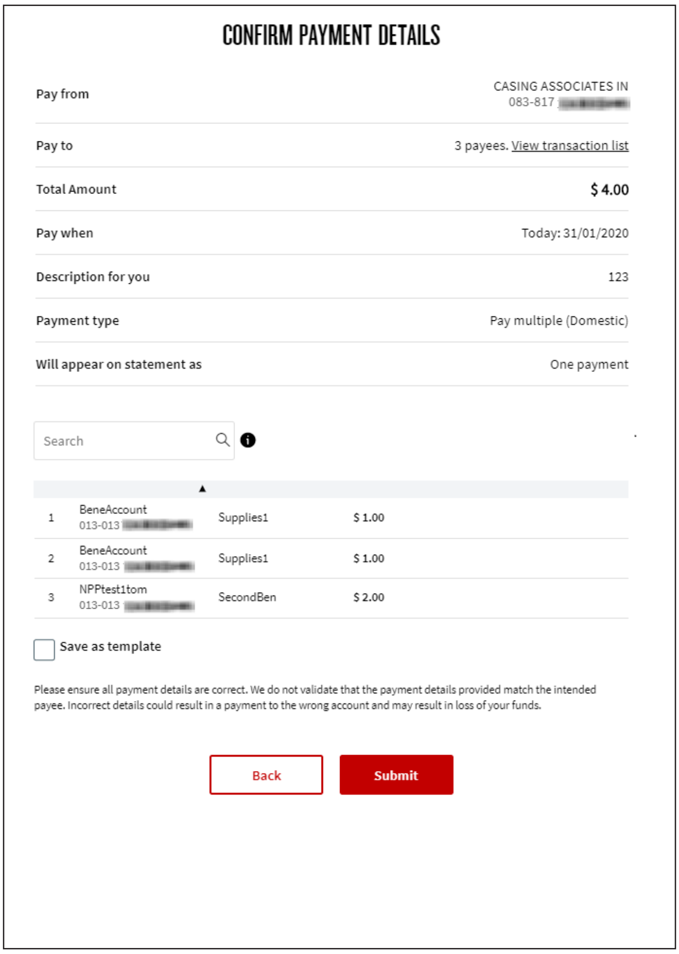



2. Modify/amend the details you want to change.
3. Click **Save & Continue**. You may receive a prompt to check the details before being returned to the **Pay to** page.

Tip: Click **Back to payment** to cancel and go back at any stage.

## 5 Confirm payment details and submit payment for authorisation

Once you have entered your payment details and clicked **Next** (see 3: *Select multiple payees*), NAB Connect prompts you to confirm the details before submitting the payment for authorisation.

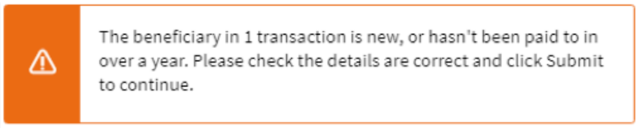



1. Ensure all payment details are correct. The Payee Nickname will display as default. NAB Connect does not validate that the payment details match the intended payee. Incorrect details could result in a payment to the wrong account and may result in loss of your funds.
2. To save the payment details as a template check the box: Save as template
3. To change any details, click Back
4. To confirm the details, click Submit

Upon clicking **Submit** you may receive the following alerts (see next page).

### Possible alerts:

If you receive the following alert:



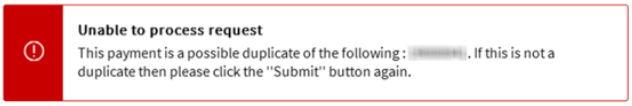

Check the beneficiary details and if they are correct, click **Submit**.

**If your payment requires repair**, you will receive the following alert. It appears at the top of a screen with all of the payment details displayed.

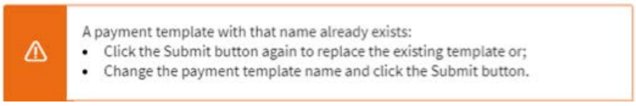

You can check details in the payment history, or click **Edit** to repair the payment, or **Delete** to delete it.

You can check details in the payment history, or click **More actions>Edit or More actions>Send for repair** to modify/amend the payment, or **Delete** to delete it.

**If your payment is a duplicate payment**, the system will alert you as follows:




**If a duplicate template exists** when you click **Save as template** the system will alert you as follows:



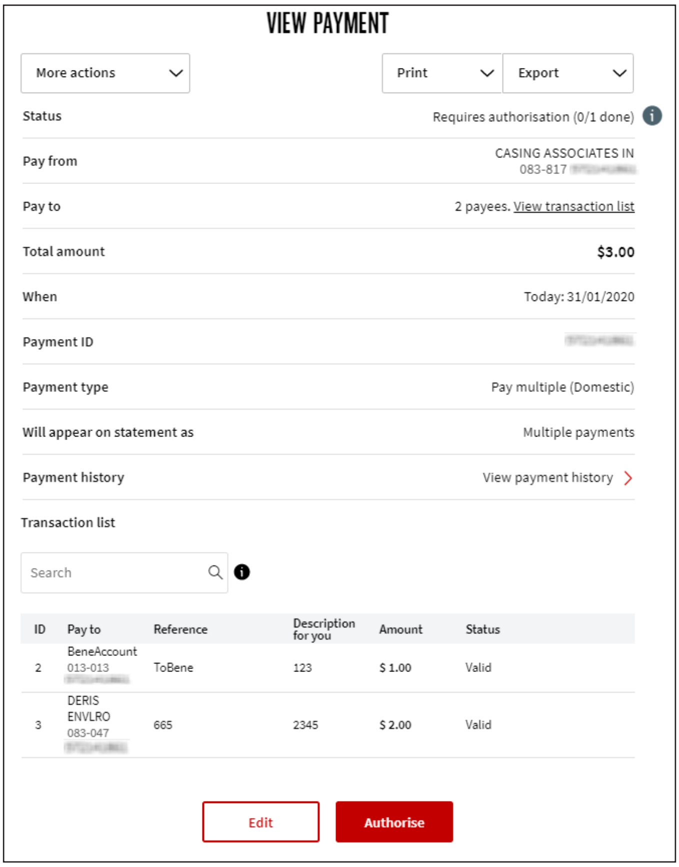

### What happens next?

Once successfully submitted, the payment you have created awaits Authorisation.

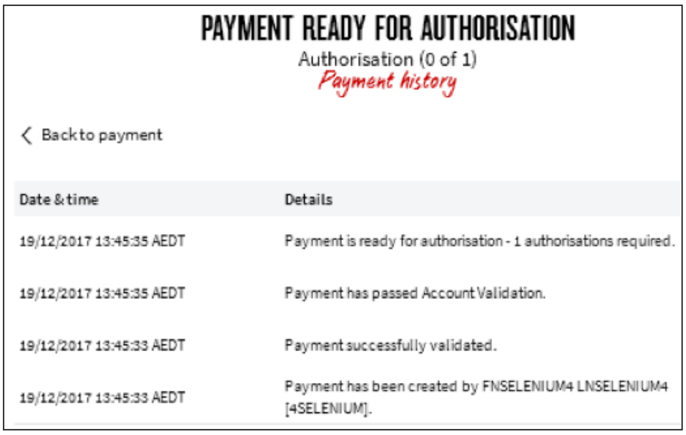
If you do not have Authorisation access, the **Payment Submitted** screen displays, showing details of the payment that you have created.

If you have the required access to authorise the payment, the **Payment Ready for Authorisation** screen displays.

- Review and if you wish to approve the payment select **Authorise** and/or
- Click **New payment** to create a new payment.




- Click **New payment** to create another payment
- Click **View payment history** to see details of previous payments (see the example below)
- Click **Close Payment** at the top of the screen if you are finished.




**Note:** If you click **Close payment** at any stage prior to submitting your payment, NAB Connect alerts you that you will lose your work.

For further assistance, call the **NAB Connect Client Centre** on **1300 888 413**.