

# NAB CONNECT QUICK REFERENCE GUIDE

more  
than  
money



## Add third-party merchant reports

This quick reference guide shows you how to enable daily reporting for a Merchant facility that is not in your business name to your NAB Connect site.

### HOW TO

1. Add a new third-party Merchant facility and enable daily reporting
2. Give users access to daily reporting

#### 1 Add a new third-party merchant facility and enable reporting

1. Click [here to open the NAB Connect Amendment Form](#), and follow the rest of this guide to navigate the form.

**Tip:** You can also access the form in NAB Connect Help – under Forms and Information

2. Complete the **Customer Information** section with your details. This section identifies your organisation as the owner of the NAB Connect facility.
3. Complete the **Specialised Services** section ensuring you select Financial file transfer as the service to add.
4. Complete the **Add other Accounts** section and enter the Merchant facility number in the Account number or card number field and the Legal entity name of the third party merchant in the Account name field. The owner or the authorised signatories of the Merchant facility to be added must review, sign and date this section of the form.

**Tip:** You can print the **Add other Accounts** page as many times as you need, if there is not enough room for all merchant facilities.

5. Complete the **Customer Declaration** and **Execution** section ensuring that the authorised signatory for the company that owns the NAB Connect facility sign and date the form.
6. Email the completed and signed form to [NABConnect.Onboarding@nab.com.au](mailto:NABConnect.Onboarding@nab.com.au) including the below informations:
  - What type of report do you wish to receive? EB165 (Domestic currency reports) or FX165 (Multi-currency reports)
  - What file format do you prefer to receive? CSV or CX1
  - Who do you want to give access to the reports? All users or provide a list of User ID/Names to be given access

#### Note:

- Merchant facilities under a different name to your NAB Connect site can only be added for daily reporting purposes using this procedure – you cannot use **Admin>Amendments**
- You can use the **Admin>Accounts** menu to assign merchant facilities to users and services, as long as the facilities are in your business name. See: [Link your accounts, credit cards or merchant facilities to services and users](#) for instructions.

A NAB Connect representative will contact you or your nominated delegate within 2 business days.

Once we have actioned your request, we will send an email to nominated delegate summarising the amendment changes.

#### 2 Give users access to daily reporting

Security Officers can provision users access to view and download reports via self-service. Login to NAB Connect to get started.

1. From the **Admin** menu, select **Users & permissions**.
2. Scroll down the list to find the user, or search of the user and click **Display**.

User ID	First name	A. Last name	Type	Status	Last logged in	Alerts
<input type="checkbox"/> 620	MI	MI	General	Active	19/09/2020 13:07:00	
<input checked="" type="checkbox"/> 620	MI	MI	Authorising	Active	13/01/2021 12:39:47	
<input type="checkbox"/> 620	MI	MI	General	Suspended	19/09/2020 13:31:06	

3. Select the check box next to their User ID and click on **Modify user**.
4. Under the Resources section, select **Mailboxes**.
5. Select the check box next to the mailbox/s you would like the user to have access to and click **Continue**.

## ASSIGN MAILBOXES ×

**MI**

2 selected

<input checked="" type="checkbox"/>	Mailbox preferred name	Mailbox name	Mailbox type
<input checked="" type="checkbox"/>	DLT		fit
<input checked="" type="checkbox"/>	TES		nei

Continue

6. Click on **Modify user** to save the changes.
7. If your business has Dual Admin activated, another Security Officer will need to approve the change.

Refer to the QRG **Use the Amendment register for viewing and approving your online amendments**

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