

Amendments – Add accounts, cards or merchant facilities

This quick reference guide is for Security Officer Plus users. It shows you how to request to add accounts, cards and merchant facilities to your NAB Connect facility. Login to NAB Connect to get started.

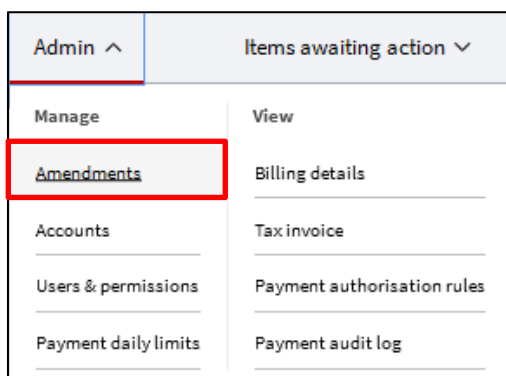
HOW TO

1. Create an amendment request to add accounts, cards or merchant facilities
2. Assign new accounts to services and users

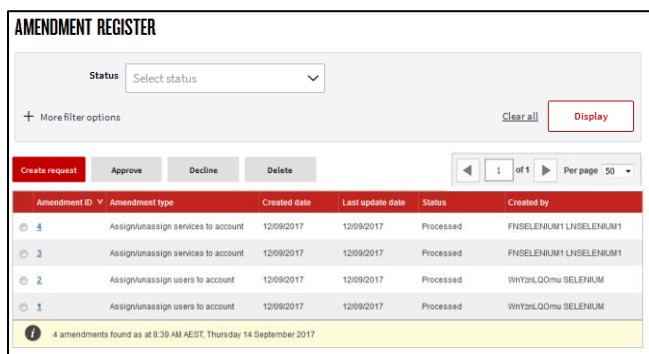
1 Create an amendment request to add accounts, cards or merchant facilities

If you want to add a business account that is not in the same name as your NAB Connect facility, all you need to do is send us a message via the **Amendments** menu:

1. From the Admin menu, select Amendments.

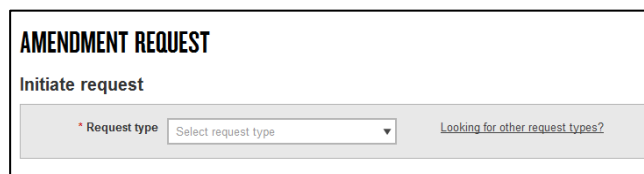


The **AMENDMENT REGISTER** screen displays.

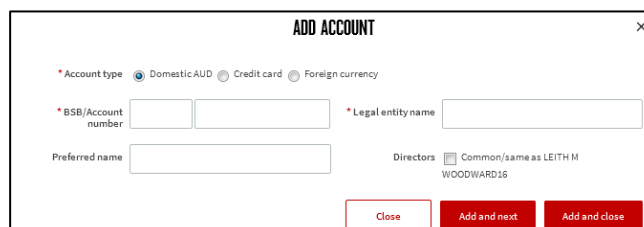


Amendment ID	Amendment type	Created date	Last update date	Status	Created by
5	Assign/unassign services to account	12/09/2017	12/09/2017	Processed	FNSELENUM1 LNSELENUM1
3	Assign/unassign services to account	12/09/2017	12/09/2017	Processed	FNSELENUM1 LNSELENUM1
2	Assign/unassign users to account	12/09/2017	12/09/2017	Processed	WnYznL00mu SELENUM
1	Assign/unassign users to account	12/09/2017	12/09/2017	Processed	WnYznL00mu SELENUM

2. Click **Create request**. The **AMENDMENT REQUEST** screen displays.



3. In the **Request type** drop-down list, click **Add accounts**. The form expands to display more fields.
4. At **Requestor contact details** check the customer details that NAB Connect has pre-populated for you.
Important: Verify the contact phone and email details update with new details if required.
5. In the **Accounts** section click **Add account**. The **ADD ACCOUNT** screen displays.



6. Select the relevant account type and then complete the details for the account, card or merchant facility that you want to add to your NAB Connect facility.
*Hint: To add a Merchant Facility, click the **Credit card** account type and type the Merchant ID in the **Card number** field. In the **Preferred Name** field, type **Merchant**. Merchant facilities are only available via **Online Statements**,*
7. If you want add more accounts, click **Add and next**. If not, click **Add and close**.

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The *AMENDMENT REQUEST* screen redisplay with the accounts listed in the **Accounts** section.

AMENDMENT REQUEST Add accounts

This request allows you to assign NAB business accounts that are not in your business name. Accounts that are in your business name can be assigned to users and services through the **Admin > Accounts** page.

Requestor contact details

Requestor: FNISELENIUM5LNSELENIUM5[SSELENIUM] Company: LEITH M WOODWARD16

* Contact phone: 0407040704 * Contact email: null@nab.com.au

Accounts

Add account Edit Delete Page 1 of 1

Account type	Account number	Legal entity name	Preferred name	Common directors
Domestic AUD	083-444 123452555	SK Testing	SK Testing	Yes

To add a new account to this request, click **Add account**. You can add up to 10 accounts. For more than 10 accounts you will need to create another request.

Next

Hide Accounts / Services

Accounts / Services	083-444 123452555	083-444 455551544
Account Balance History	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Balance Summary	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Information File		
Account Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Transaction History	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Australian Deposits	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

2 Assign new accounts to services and users

1. Click **Next** to display the *ASSIGN NEW ACCOUNTS TO SERVICES* screen.

AMENDMENT REQUEST Add accounts

Assign new accounts to services

Would you like to assign all new accounts to all services that are currently registered to your NAB Connect facility? Yes No

+ Show Accounts / Services

Previous **Next**

2. In the **Assign new accounts to services** section, select:
 - **Yes**, to add the new accounts to all the services currently registered to your NAB Connect facility.
 - **No**, to select which accounts you want your services to be used with.

Important: If you are unable to assign some accounts, it may be due to the relationship type of the account. To distinguish the relationship between accounts, click the **Admin** menu and select **Accounts**. The account relationships display in the **Relationship type** column.

The *Accounts/Services* matrix displays.

3. Depending on the option you chose to assign the new services to your accounts, the matrix will either be editable or not.

If the matrix is editable, tick the new service checkbox/s for each account. Click **Next** to continue.

4. In the **Assign new accounts to users** section, select:
 - **Yes**, to add the new accounts to all users currently registered to your NAB Connect facility.
 - **No**, to select which accounts you want to add to your users.

5. Depending on the option you chose to assign the new services to users, the matrix will either be editable or not.

If the matrix is editable, tick the new service checkbox/s for each account.

Click **Next** to continue.

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Hide Accounts / Users

Accounts / Users	083-444 123452555	083-444 455551544
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DtzbVEvMqU SELENIUM [29SELENIUM]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FN10EUSER LN10EUSER [10EUSER]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FN11EUSER LN11EUSER [11EUSER]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

6. Read the next steps and print the print the completed amendment form. The form will display sections that didn't appear on the screen/section you just completed, such as:

- *Terms and Conditions*
- *Customer Declaration and Execution Signatories for the Customer*
- *Third Party Authority - Signatories for Third Party*

AMENDMENT REQUEST Add accounts

Next steps

Step 1. Click **Print request** and review the generated amendment form

Step 2. The third party sections must be **signed by the account owners**

Step 3. Scan and return the form via email to NABConnect.Onboarding@nab.com.au

Step 4. A NAB Connect representative will contact you **within 2 business days.**

7. You'll need to sign in the relevant sections then scan and email your signed PDF to NABConnect.Onboarding@nab.com.au.

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