

Amendments – add services

This quick reference guide is for Security Officer Plus users. It shows you how to request additional services in NAB Connect. Login to NAB Connect to get started.

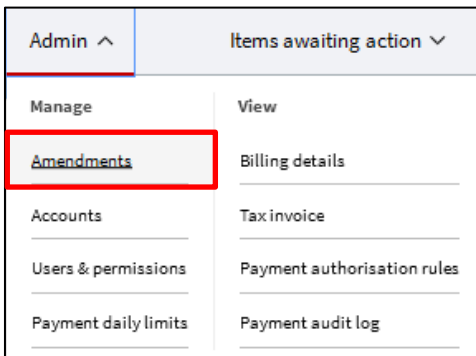
HOW TO

1. Create an amendment request to add services
2. Assign new services to accounts and users

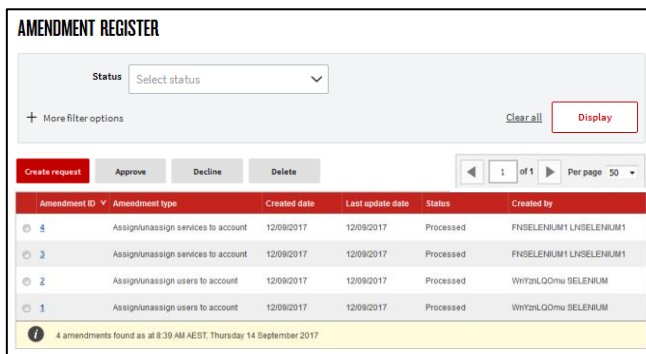
1 Create an amendment request to add services

If you want to add services to your existing NAB Connect facility, all you need to do is send us a message via the **Amendments** menu:

1. From the **Admin** menu, select **Amendments**.

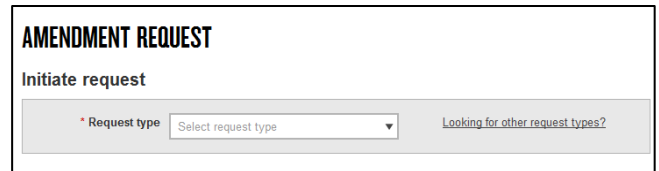


The **AMENDMENT REGISTER** screen displays.

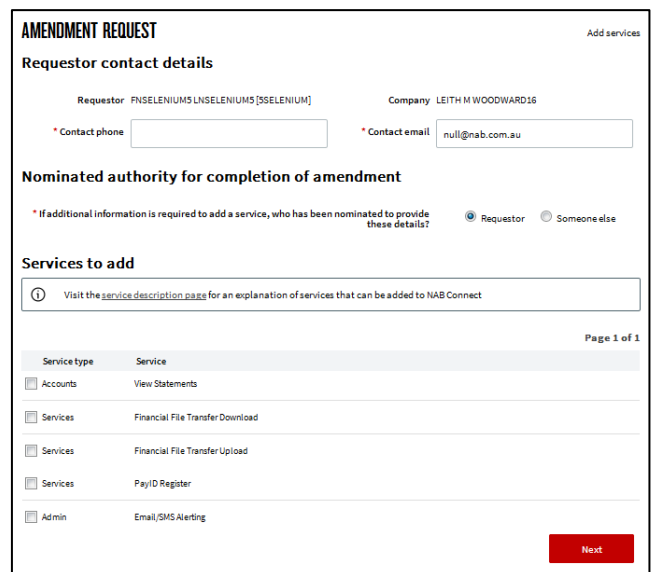


Amendment ID	Amendment type	Created date	Last update date	Status	Created by
4	Assign/unassign services to account	12/09/2017	12/09/2017	Processed	FNSELENIUM1 LNSELENIUM1
3	Assign/unassign services to account	12/09/2017	12/09/2017	Processed	FNSELENIUM1 LNSELENIUM1
2	Assign/unassign users to account	12/09/2017	12/09/2017	Processed	WYzrLQOmU SELENIUM
1	Assign/unassign users to account	12/09/2017	12/09/2017	Processed	WYzrLQOmU SELENIUM

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

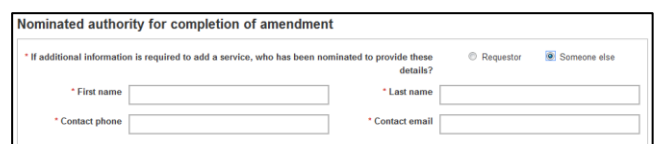


3. In the **Request type** drop-down list, click **Add services**. The screen expands to display the following fields:



4. Check the **Requestor contact details** section. It is pre-populated - verify the contact phone and email details and update with new details if required.
5. In the **Nominated authority for completion of amendment** section, select who will be the primary contact for this request. This will either be **Requestor** (yourself) or **Someone else**.

If you select the **Someone else** option, you'll need to provide additional details of the person you nominated. These additional details are mandatory.

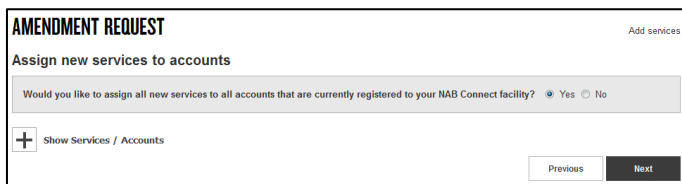


Amendments – add services

- Once you've finished nominating a contact for the request, click **Next**.
- In the **Services to add** section, select the services you want to add from the list by ticking the corresponding checkbox.
- Click **Next**.

2 Assign new services to accounts and users

- If you are adding Direct Credit, Payroll or Executive Payroll services an additional information screen displays where you need to have a Direct Entry (DE) ID to proceed.
 - If you don't have a DE ID, then select **New (fee applies)** a *Credit User Application Form* will be emailed to you in PDF format. You'll need to sign the form and return it to NAB.
 - If you have a DE ID, then select **Existing**. The Onboarding Team will contact you within 48 hours of lodging the request to obtain the details of the existing Direct Entry Credit User ID you want to add or assign to the new service.
- Click **Next** to display the *Assign new services to accounts* screen.



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

Hide Services / Accounts

Services / Accounts	View Statements
PIT Account AC [REDACTED]	<input type="checkbox"/>
PIT Account AC [REDACTED]	<input type="checkbox"/>
PAYMENTS ACCOUNT [REDACTED]	<input type="checkbox"/>
PAYMENTS CREDITCARD [REDACTED]	<input type="checkbox"/>
PIT Account AC [REDACTED]	<input type="checkbox"/>

The *Services/Accounts* matrix displays.

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

NAB CONNECT

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Hide Services / Users

Services / Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	View Statements	Financial File Transfer Download	Financial File Transfer Upload	
DtzbVEvMqU SELENIUM [29SELENIUM]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FN10EUSER LN10EUSER [10EUSER]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FN11EUSER LN11EUSER [11EUSER]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FN12EUSER LN12EUSER [12EUSER]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7. Read the next steps and 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 services

Next steps

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

Step 2. The NAB Connect owners must *sign the customer declaration and execution section*

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*.

8. Sign where indicated 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.