

# NAB CONNECT

## Quick Reference Guide



### Assign services and users to an account

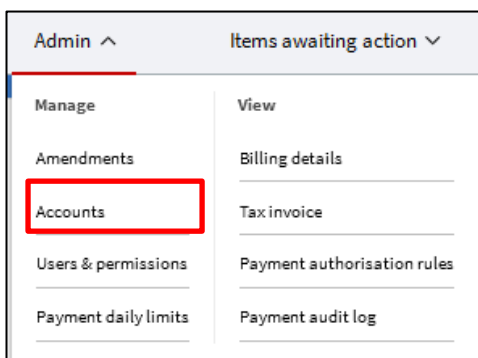
NAB Connect automatically registers first party accounts (accounts held in the same name as your NAB Connect site), but you may need to rename the accounts or make changes to the services and users assigned to the accounts. This quick reference guide shows Security Officer Plus users how to make these changes. Login to NAB Connect to get started.

## HOW TO

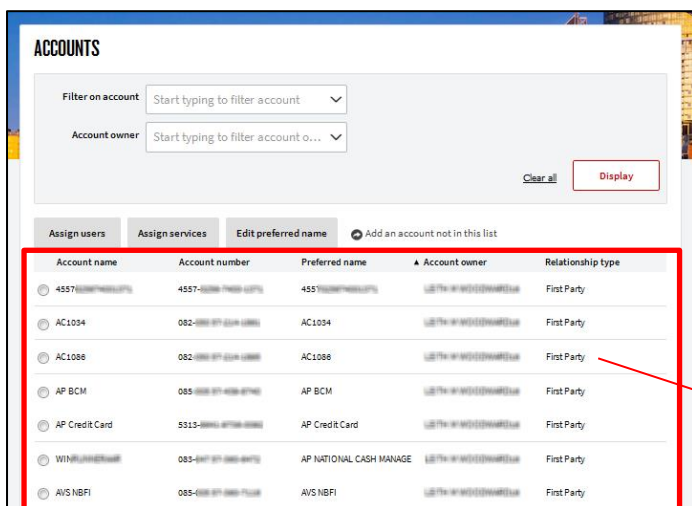
1. Choose the account
2. Assign or remove a user
3. Assign or remove a service
4. Modify the preferred account name

### 1 Choose the account

Click the Admin tab and select Accounts.



All first party and registered accounts are displayed in a scrollable list as follows:



*Note: Your NAB Connect site may have been configured to require two Security Officer Plus users to perform these functions. If this is the case, use the NAB Connect Amendment form to activate your changes.*

To find an account:

- scroll through the list, or
- in Filter on account, start typing the account name until it displays in the list, or
- in Account owner, start typing the account name until it displays in the list.

*Note: To register a new account to your site, refer to: Link your accounts, cards or merchant facilities to a service and give your users access.*

To select an account

- click the radio button next to the account:

Account name	Account number	Preferred name	Account owner	Relationship type
<input checked="" type="radio"/> 4557-1000-7800-0070	4557-1000-7800-0070	4557-1000-7800-0070	LE79-W00000000000	First Party

### 2 Assign or remove a user

1. After selecting the account, click the Assign users button at the top of the list:



*Tip: These two buttons become active upon selecting an account*

The ASSIGN USERS screen displays.

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*Tip: Relationship type on the far right indicates if the account is 'First Party'.*

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### Assign services and users to an account

*Tip: Services currently assigned to the account are shaded in blue.*

*Tip: Users currently assigned to the account are shaded in blue. To select all users in the list, click Users at the top.*

2. Check the box next to the user you want to assign to the account or remove from the account.
3. Click **Save**. The users are assigned or removed from the account.

2. Check the box next to the service you want to assign to the account or remove from the account.
3. Click **Save**. The service is assigned or removed from the account.

### 3 Assign or remove a service

1. After selecting the account, click the **Assign services** button at the top of the list:

The **ASSIGN SERVICES** screen (shown opposite) displays.

*Note: Depending on your NAB Connect configuration, the following message may appear:*

### 4 Modify preferred account name

Editing the preferred account name enables you to easily identify the account in NAB Connect. Creating a preferred account name does not alter the legal entity of the account.

*Note: In some NAB Connect screens, only the preferred name will display.*

1. After selecting the account, click the **Edit preferred name** button at the top of the list:

The **EDIT PREFERRED ACCOUNT NAME** screen displays.

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### Assign services and users to an account

#### EDIT PREFERRED ACCOUNT NAME

Enter the new name for the account 'personal account'

Account preferred name

2. Enter your preferred name for the account.
3. Click **Save**. The new name will now display to all users accessing the account.

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