

# NAB CONNECT

## Quick Reference Guide



Link your accounts, cards or merchant facilities to a service and give your users access

This quick reference guide outlines steps how, as a Security Officer, you can link your accounts, cards or merchant facilities to a service, and also how to give your users access to use them.

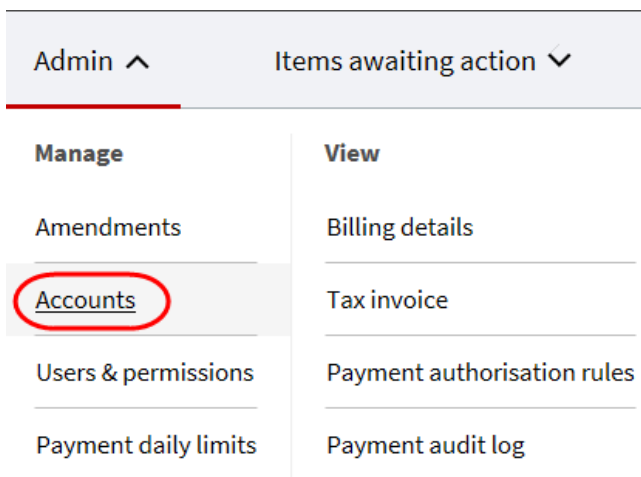
Login to NAB Connect to get started.

## HOW TO

1. Choose an account, card or merchant facility
2. Link to a service
3. Give your users access
4. Create a nickname for your accounts, cards or merchant facilities

### 1 Choose an account, card or merchant facility

1. From the Admin menu, select Accounts.

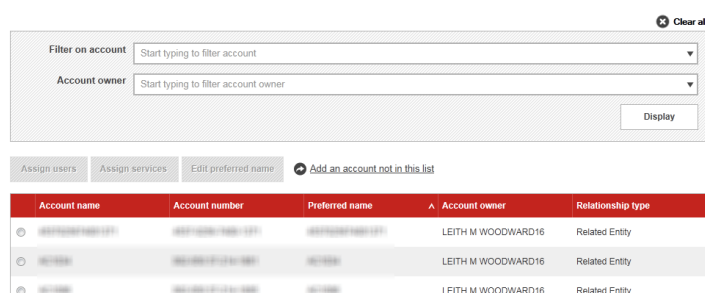


The ACCOUNTS screen displays all your accounts.

2. Find the account, card or merchant facility you want to link a service to.

**Note:** If you have a large number of accounts to choose from, use the filter options at the top of the page to narrow your options.

### ACCOUNTS



3. Select the option button for the account.

**Important:** If you are unable to assign some accounts to services, it may be due to the relationship type of the account. The account relationships display in the Relationship type column.

If the Relationship type is not First Party or Related Entity, you must complete an online AMENDMENT REQUEST to assign the accounts to services. Click 'Add an account not in this list' to complete the online form. Refer to QRG *Amendments – Add accounts, cards or merchant facilities* for more information

### 2 Link to a service

1. Click Assign services.



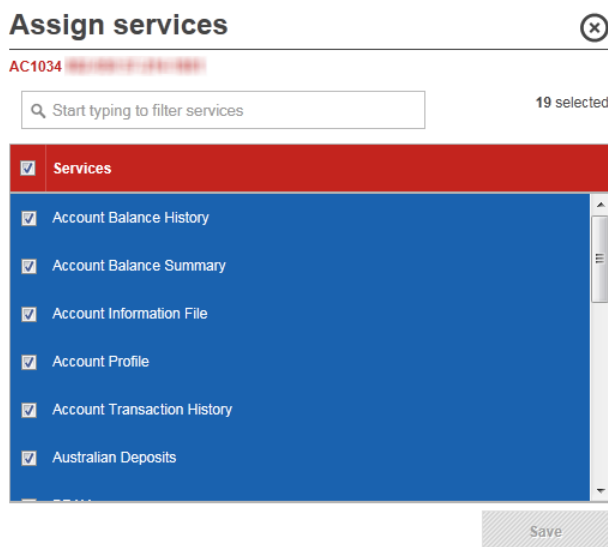
2. Select the checkboxes of the services you'd like to use this account with.
  - If the services are shaded in blue, it means they've already been assigned.
  - If you'd like to select all the services, click the checkbox in the red Services menu bar.

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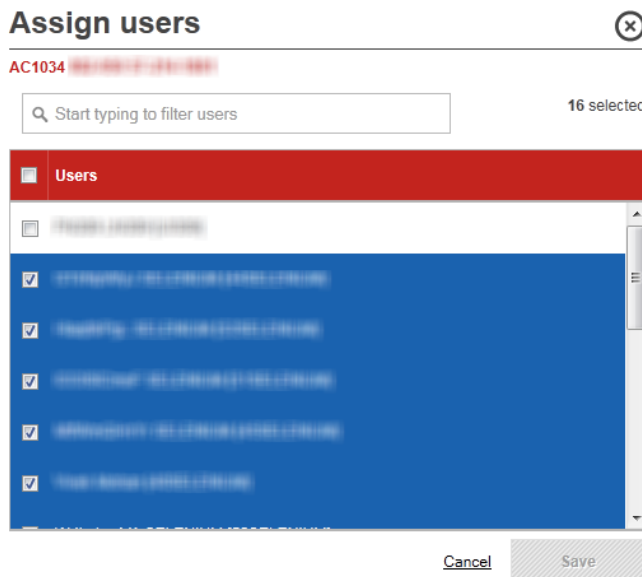
3. Click **Save**.
4. If your business has Dual Admin activated, another Security Officer will need to approve the change.  
Refer to the QRG *Use the Amendment register for viewing and approving your online amendments*.
5. If you want to view or approve your online amendments, refer to the QRG *Use the Amendment register for viewing and approving your online amendments*.

### 3 Give your users access

You can request access to NAB Invoice Finance, Trade Finance Online and Corporate Card Self Service via secure messaging.

Refer to the QRG *Make enquiries, request changes and view responses using secure messaging in NAB Connect*.

1. Click **Assign users**.
2. Select the checkboxes for the users you'd like to have access to this account.
  - If the users are shaded in blue, it means they already have access.
  - If you'd like to select all the users, click the checkbox in the red **Users** menu bar.



3. Click **Save**.
4. 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*.

### 4 Create a nickname for your accounts, cards or merchant facilities

1. Choose the option button for the account, card or merchant facility you want to edit the nickname for.
2. Click **Edit preferred name**.
3. In the **Account preferred name** field, type your new preferred name.

4. Click **Save**. This new nickname will display to all users that have access to the account.

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