

NAB CONNECT

Quick Reference Guide



Create, view and delete a domestic payment using the Mobile app

This quick reference guide shows you how to use your mobile app to create a one-to-one payment (for a payment within Australia). The payment will be made as an Overnight payment unless you change the payment method to fast payment. Overnight payments are settled by the next business day. Fast payments, in most cases, take less than a minute.

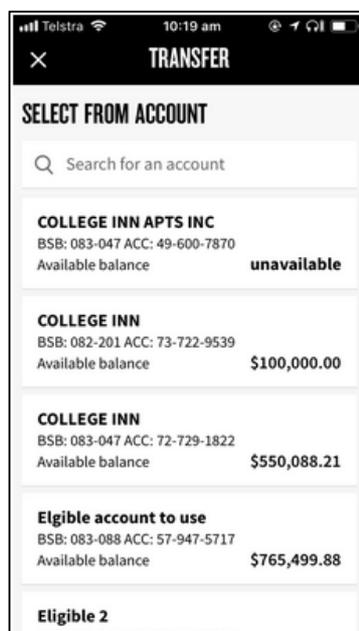
Click [here](#) to view associated NAB Connect fees and charges

Login to the Mobile App to get started

HOW TO

1. Create a payment by transferring funds between linked accounts
2. Create a Pay anyone (Domestic) payment
3. Create a new payee
4. View payment details and history
5. Delete a payment

2. Tap **Transfer (Linked accounts)**. The *TRANSFER* screen opens, displaying all accounts that you can transfer **from** (and their current balances):

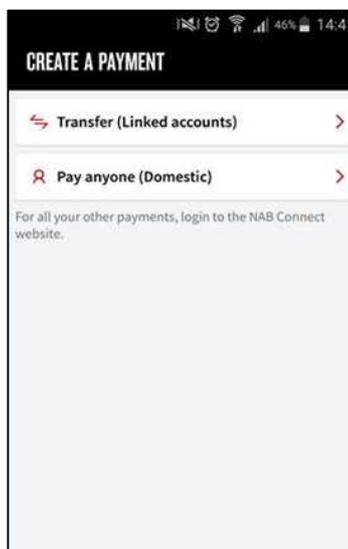


1 Create a payment by transferring funds between linked accounts

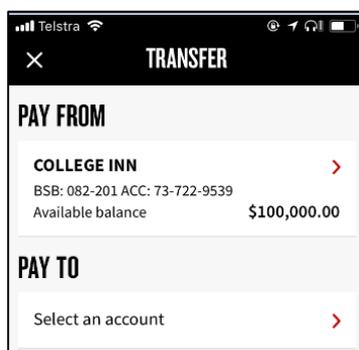
1. Tap the **Pay** icon in the menu bar at the bottom of the screen:



The *CREATE A PAYMENT* screen displays:



3. Select or search for the required account and tap it. The account displays as follows



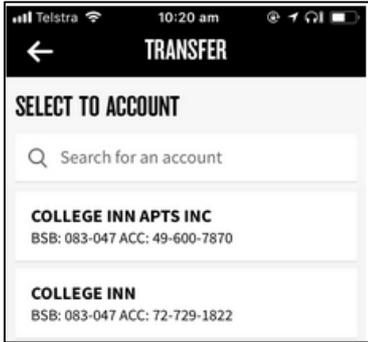
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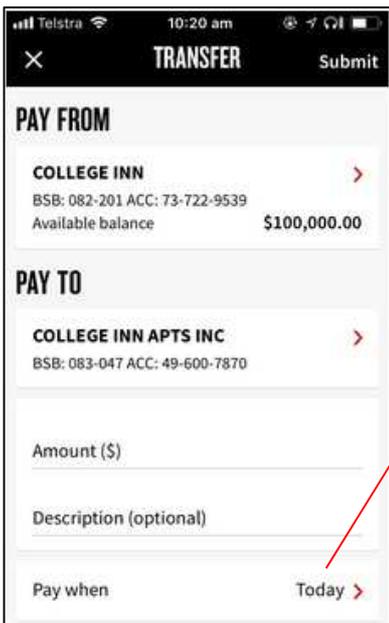


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5. Select the TO account:



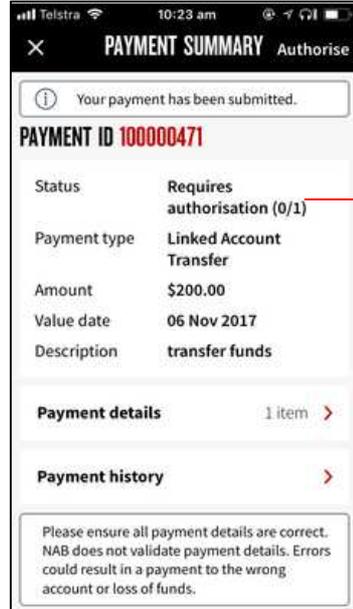
6. Enter the payment details (Amount, Description and Pay when).



Note: You can schedule a payment for 'today' (default) or any future date, up to 90 days from today.

6. Click **Submit**.

When the payment is successfully submitted, the **Payment Summary** screen displays (see opposite). It provides a confirmation message and a Payment ID.



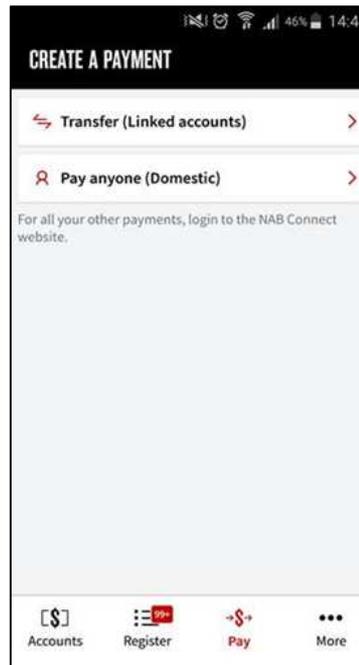
*Note: When the payment status is **Requires authorisation**, it means a user with authorising permission can authorise the payment (See the quick reference guide: [Authorising a payment using the Mobile App](#).)*

2 Create a Pay anyone (Domestic) payment

1. Tap the **Pay** icon in the menu bar at the bottom of the screen:



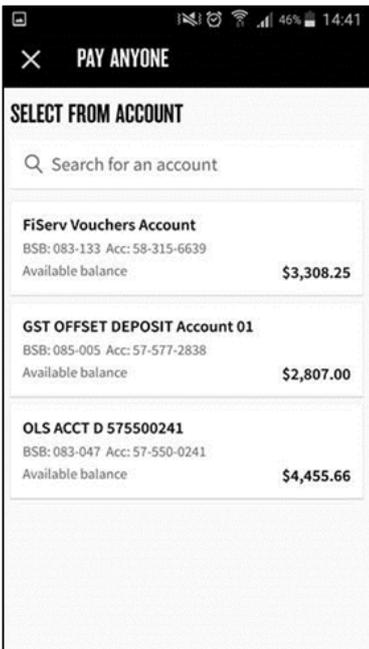
The **CREATE A PAYMENT** screen displays:



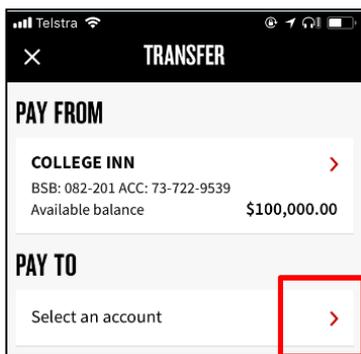
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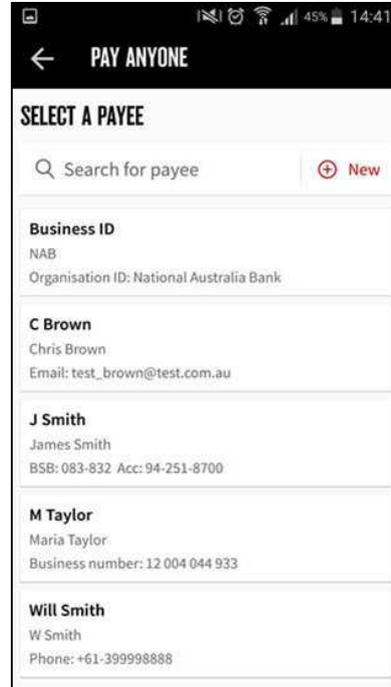
2. Tap **Pay anyone (Domestic)**. The *PAY ANYONE* screen opens, displaying all accounts that you can transfer **from** (and their current balances):



3. Select or search for the required **from** account and tap it. The account displays as follows



4. At **PAY TO**, tap the **Select a payee** arrow.
All saved payees are displayed (see opposite).



Tips:

- Use the Search function to find a payee if the list is long
 - The list includes any PayIDs you have saved from previous fast payments, and any BSB/Account numbers that you have saved in previous overnight or fast payments.
 - If the required **To** payee is not listed, tap **New** and create the payee (go to 3: Creating a new payee, then return here to complete the payment)
5. Tap the required **To** payee (or create a new payee). The Pay Anyone screen refreshes and provides fields for:
 - Payment method
 - Payment amount
 - Description for you
 - Description for payee
 - Pay when field

(See the example on the next page)

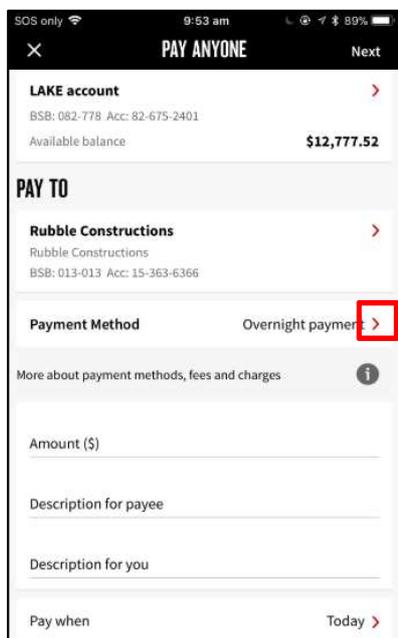
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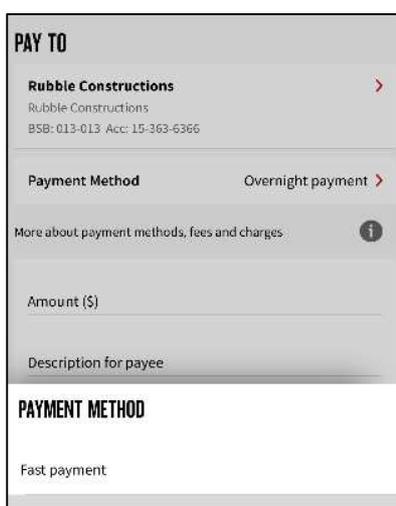


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Payment method

- The default method is **Overnight payment** unless you or your organisation has changed the default in *My settings*. Overnight payments are settled by the next business day
- A red arrow indicates that you can choose another method to make this payment (e.g. fast payment). Tap the arrow to open the method selector:



- If you select **Fast payment**, you will be able to enter a detailed description (see below). The payment will be sent through immediately when the payment is approved.

Tip:

- For more information on fast payments, see the quick reference guide: [Create a fast payment with the Mobile App](#)
- Tap [More about payment methods, fees and charges](#) for details on the payment methods available for this payment.

Payment amount

- Tap the **Amount** field to open a numeric keyboard, and key in the payment amount.

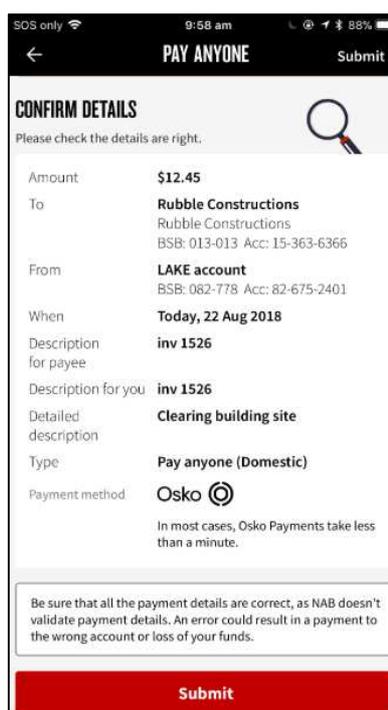
Description fields

- Tap the **Description for payee** field to open a keyboard, and key in a description that will make sense to the payee.
- Tap the Description for you field to key in a description that will appear on your statement.
- If you have chosen Fast payment as the payment method, a **Detailed description** field will be available (optional), viewable to both you and the payee.

Payment when

- If an arrow appears in this field you can tap it and enter a future date for the payment, up to 90 days in the future.

When you've finished entering payment details, tap **Next**. The **CONFIRM DETAILS** screen displays:



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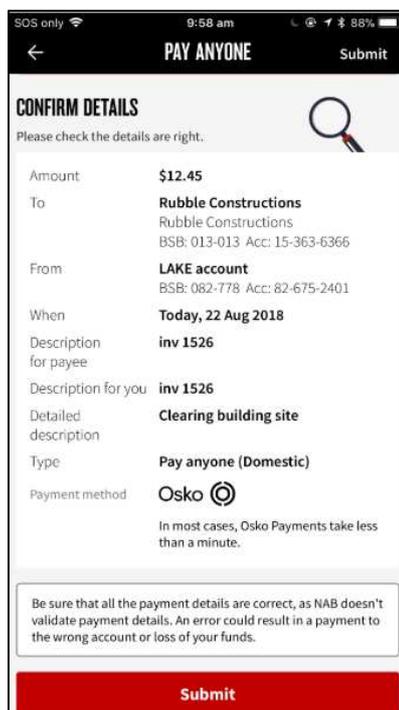
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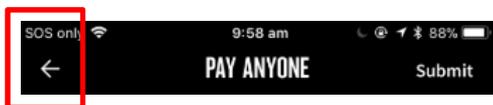
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NAB Connect prompts you to confirm the details before submitting the payment for authorisation.



Important: Ensure all payment details are correct. NAB Connect does not validate that the payment details match the intended payee. Incorrect details could result in a payment to the wrong account and may result in loss of your funds.

- If anything needs changing, tap the back arrow in the header, and navigate back to the information that needs to change:

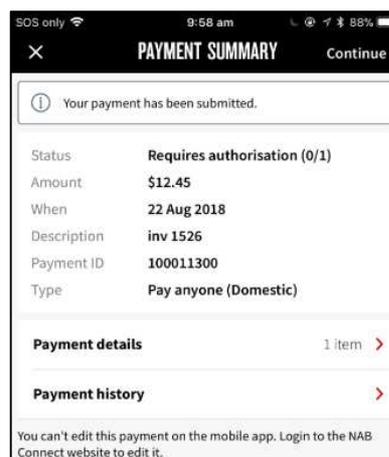


- If everything is correct, tap **Submit**:

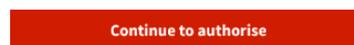


What happens next?

If the payment is successfully submitted, the *PAYMENT SUMMARY* screen displays, with a message indicating successful submission at the top.



- If the payment must be authorised by someone else in your organisation, it will appear in their Payment Register icon.
- If you are an approved Authoriser, the following button also appears:

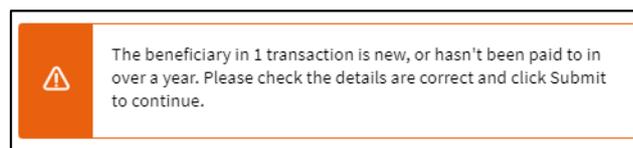


Tip: Refer to the quick reference guide: [Authorising a fast payment with the Mobile App](#) for authorising instructions.

If the payment is **not** successfully submitted, an error message will tell you what to do next (see below)

Possible error messages after clicking Submit

If you receive the following alert, check the beneficiary details:



Once you are satisfied with the beneficiary details, tap **Submit** again.

If your payment requires repair, you will receive the following prompt. It appears at the top of a screen with all of the payment details displayed.

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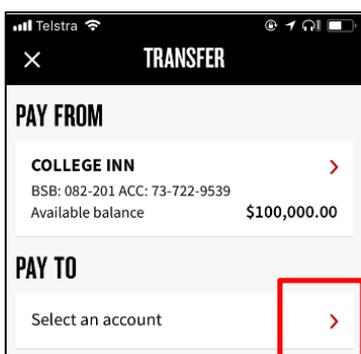


You can check details in the payment history or tap **Edit** to repair the payment, or **Delete** to delete it.

3 Create a new payee

When making a payment, you can create a new payee for a specific one-off payment or for use in future payments as well.

1. In the Pay TO screen, tap the arrow next to **Select an account**:



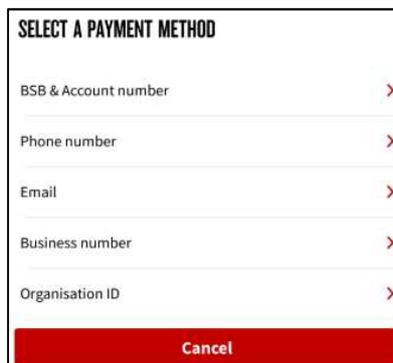
The SELECT A PAYEE screen displays.

2. Tap the **New** icon:



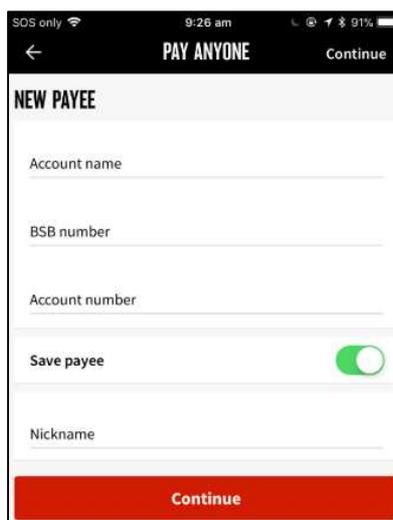
You are prompted to enter the payment method before entering payee details, as the method determines what details are required.

The SELECT A PAYMENT METHOD overlay displays (see opposite)



Select the payment method you would like to use.

The New Payee screen displays (the sample below is for a BSB/Account number payment)



3. Tap each field and enter the Payee details required.

When you enter the BSB, NAB Connect verifies the BSB number and displays the name of the financial institution

Important: NAB Connect **does not** verify the account name or account number, so ensure these details are correct.

4. Select **Save payee** if you wish to use these Payee details again in the future (optional). Enter a nickname for the payee. The nickname will appear in the list of payees, after you save the payee.
5. Tap **Continue**.

You are returned to the Pay To screen, where you can enter details of the payment.

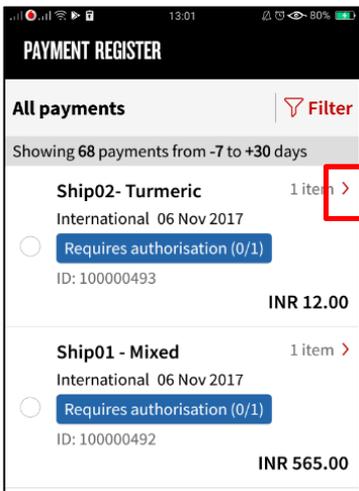
4 View payment details and history

You can view payment details and payment history by opening the **Payment Register**, finding the payment and selecting **Payment Summary**.

1. Tap the **Register** icon:



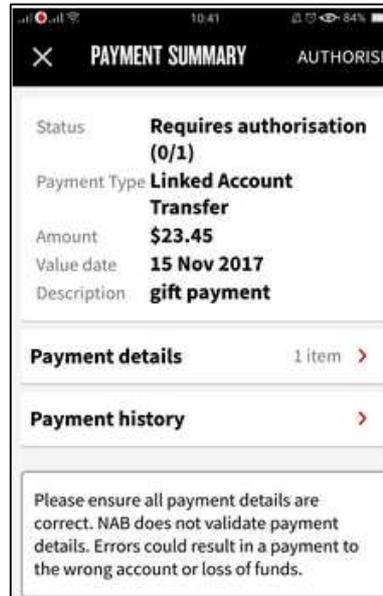
The **PAYMENT REGISTER** screen displays:



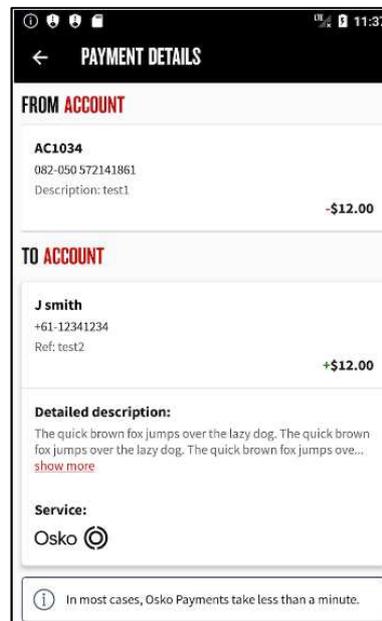
2. Find the payment you want to view. (Use the **Filter** function if there is a long list.)
3. Tap the red arrow to the right of the payment to view the payment summary.

The **PAYMENT SUMMARY** screen displays (see opposite)

The **Payment Summary** provides information on the payment selected.



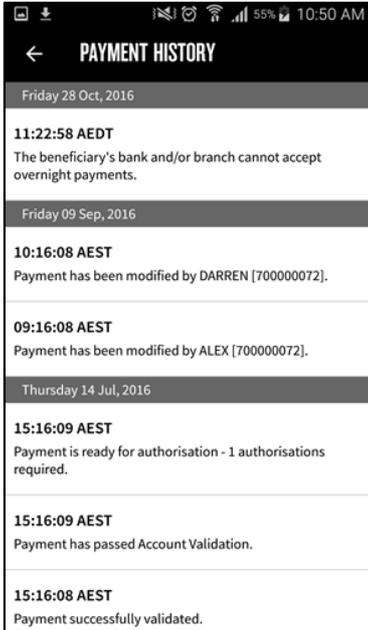
4. You can drill down to view payment details:



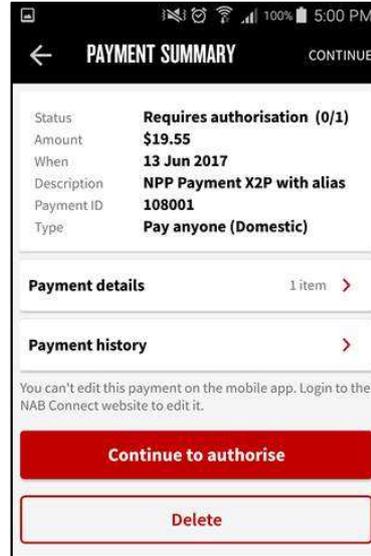
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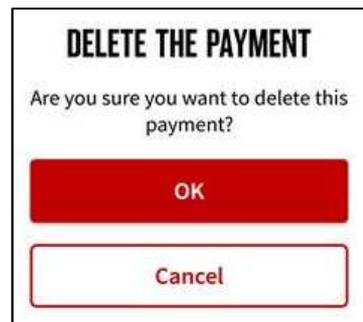
5. You can also view a payment's history from the Payment Summary screen.



2. Click the red arrow to the right of the payment. The Payment summary screen displays:



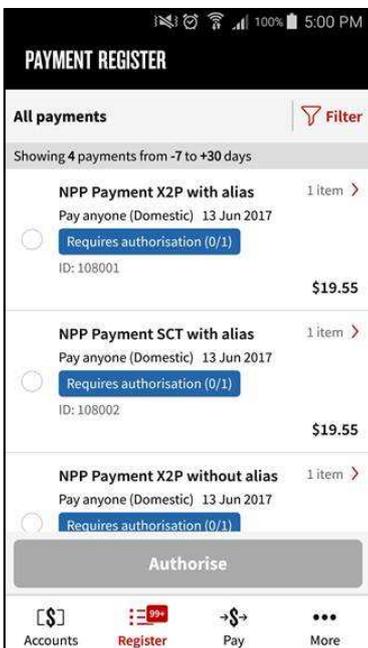
3. Click **Delete** (Note: The Delete button will only be enabled if the payment is in the correct status and other business rules have been met). You are asked to confirm the deletion: If you are sure, click **OK**.



5 Delete a payment

Users with the appropriate system permission can delete payments. Only payments in the following status can be deleted: **Requires authorisation**, **Requires repair**, **Suspended**.

1. In the Payment register, find the payment you want to delete.



4. You are returned to the Payment register. The following confirmation message appears on the screen:



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