CommBiz User Guide

Nominating Service Delegates

About this guide

This guide shows you how to nominate Service Delegates to simplify and speed up the process of creating Maintenance Requests to add new CBA accounts, authorise setting up Commercial Card Administrators, authorise Enable Foreign Exchange requests and add or change Electronic Account Authorities. Once Service Delegates are nominated and confirmed, they can electronically authorise such requests without having to print and post in forms.

Important

To nominate Service Delegates, you must have Admin Permissions and a security token.

Nominating Service Delegates

- 1. Open your internet browser, visit www.commbiz.com.au and log in to CommBiz.
- 2. On the top menu, hover over Admin, then select Maintenance Requests from the drop down menu.
- 3. The Find Maintenance Request screen is displayed.

🖉 Find Maintenance Request - Windows Internet Explorer									803
https://login.commbiz.commbank.com.au/client/admin/loadRequestsListDoActi	ion.aspx?CBAAUTH=STE	EPUP						V 🔒 Iden	tified by VeriSign
Com	nonwealth	Bank 🔶				Help Site Map			<
						Com	nBIZ		
Home	Accounts Pa	yables Receivables	File Transfer	Functions	Admin	8	Print Page		
(Fin	nd Maintenance Req	uest		User ID: 100199209 User Name: Service ID: 100002001 Service Name:	Stephen Craft PBS			
Stephen C	Craft Se	arch							
Service	Dat	te:	 All 						
Audit			O Exact:	-					
Maintenan	ice Requests		From:	1999					
Maintena Status L	ance Request ist		To:						
Add Acc	ount(s)								
Add an E Account	Electronic Red Authority	quest Type:	Select		v				
Edit an E Account	Electronic Authority	quest Number:	100002001 -						
Enable a Type / R	Transaction	Clear		C	Search				
Add an A	APCA ID 345	Maintenance Requests found,	displaying 1 - 10			1 2 3 4 5 6 7 8 9 10 Next	» Lasta		
Add a Di	irect Debit Da	te Created v	Request Number	Created By	Request Type	Status			
Request Enable F	17/	/03/2009 4:14:37 PM	100002001-345	Bank User	Identify a User	Cancelled			
Exchang	le 17/	/03/2009 3:17:18 PM	100002001-344	Robert Mac	Edit an Electronic Account Authority	Awaiting Authoris	ation		
Service	Delegate 17/	/03/2009 3:14:32 PM	100002001-342	Bank User	Edit an Electronic Account Authority	Awaiting Authoris	ation		
	17/	/03/2009 2:06:04 PM	100002001-341	Bank User	Add Account(s)	Submitted			
	17/	/03/2009 11:57:20 AM	100002001-340	Ricardo Pinto	Edit an Electronic Account Authority	/ Submitted			
	17/	/03/2009 11:39:55 AM	100002001-339	Ricardo Pinto	Edit an Electronic Account Authority	Processed			
	16/	/03/2009 5:06:01 PM	100002001-338	Ricardo Pinto	Service Delegate Maintenance	Processed			
	16/	/03/2009 1:55:51 PM	100002001-337	Paul Peacock	Edit an Electronic Account Authority	Cancelled			
	16/	/03/2009 1:54:31 PM	100002001-336	Paul Peacock	Edit an Electronic Account Authority	Cancelled			
	345	Maintenance Requests found,	displaying 1 - 10			1 2 3 4 5 6 7 8 9 10 Next	a Lasta		
			V3 © 2009 (lid as at 18 Marc	ch 2009, 10 02:46 Sydney time ank of Australia, APN 48 123 123 124				
			© 2003 C	on weater b	ann or Australia, ADN 40 123 123 124				~
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4. On the left-hand menu, click Service Delegate.

5. The Service Delegate Maintenance screen is displayed.

Service Delegate Maintenance - Windows Internet Explorer					202
https://login.commbiz.commbank.com.au/dient/admin/ServiceDelegateDoAction.aspx?sess	ionIncrement=18requestToken	-jg41L9H3alMDj3wx9beWNA			💌 🔒 Commonwealth Securities Limited [AU]
				Help Site Map LOG OFF	<u>^</u>
Cormonwe	ealthBank 🔶	•			
	/			CommBiz	
Home Account	s Payables Rece	eivables File Transfer Func	tions Admin	Drint Page	
			User ID: 100199209 User Nam	e: Stephen Craft	
	Service Delegat	e Maintenance	Service ID: 100002001 Service N	lame: PBS	
Stephen Craft	Nominatin	g Service Delegates removes the neer	d to print and sign forms when adding New Ac	counts or changing the Electronic	
Service	Account A minutes.	withority, reducing the turn around tim You can add as many Service Delegat	e to complete your request from several days tes as you want and define if you want 1 or 2 t	to just hours or in some cases to authorise requests.	
Users	2	and adverse the second s		the construction of the local sectors and	
Audit					
Maintenance Reques	ts Existing Service	Delegate List (One to Authoris	se)		
Maintenance Requ	User ID	Name	Delegate Status		
Status List	100011599	Mr Bruno Di Mattia	Active	Delete	
Add Account(s)	10000054	Mr Peter Maddison	Active	Delete	二
Add an Electronic Account Authority	100000523	Mr Ricardo Pinto	Active	(Delete)	
Edit an Electronic Account Authority	Add a new Servi	ce Delegate			
Enable a Transacti Type / Report	on Select an existing lo	lentified user from the list below to ad	d a new Service Delegate (only identified user	rs can be added)	
Add an APCA ID	Identified users:	Adam Bruce 👻	Add		
Add a Direct Debit Request	User ID		Name		
Enable Foreign	Define Authorisa	tion Rule			
Exchange	Please select the nu	umber of Service Delegates that will be	e required to electronically authorise Maintena	ance Request	
Service Delegate	Number of Delegate	s: 1 💌			
	(Cancel)			(Confirm)	
		Valid as	at 18 March 2009. 10:14:06 Sydney time.		
		© 2009 Commo	mwealth Bank of Australia, ABN 48 123 123 1	24	
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Note: The Existing Service Delegate List displays the status of any Service Delegates you have added to your service.

6. Click on the drop down list under Add a New Service Delegate and choose the identified user you want to add, then click the Add button.

Note: Only Identified Users (users who have had their identity verified by the Bank) can be added.

Defining the Authorisation Rule

7. Now click on the **Number of Delegates** drop down list to set the number of Service Delegates required to electronically authorise maintenance requests (either 1 or 2).

Note: If you select 'Disabled' from this drop down list, the Service Delegate functionality will be disabled; in other words, electronic authorisation of Maintenance Requests will not be possible and they will revert to being paper-based.

8. Click the **Confirm** button.

9. The confirmation screen is displayed.

🖉 Service Delegate Maintenance - Confirmed - Windows Internet Explorer				00			
https://login.commbiz.commbank.com.au/Admin/Admin.Web/Maintenance/ServiceDelegate.asp	x?sessionIncrement=1&requestToken=jg41L9H3alMDj3wx9beWNA		~	🔒 Identified by VeriSign			
Conmonwea	ithBank 🔶	Heip Site Map		<u>^</u>			
Home Accounts	Payables Receivables File Transfer Functions	Admin	G Print Page				
S	Service Delegate Maintenance - Confirmed	User ID: 100199209 User Name: Stephen Craft Service ID: 100002001 Service Name: PBS					
Stephen Craft	Your request has been successfully submitted to the Commonw	ealth Bank of Australia for processing.					
Users	For future reference please note your request number.						
Audit	Commisiz Request Number: 100002001-346						
Maintenance Requests	CommBiz Forms						
Maintenance Request Status List	t. The following CommBiz forms are required to be completed and submitted to the bank for verification. Please print the forms, request all relevant parties to sign and post to the following address:						
Add Account(s)	CommBiz						
Add an Electronic Account Authority	Reply Paid 332 Silverwater NSW 2128						
Edit an Electronic Account Authority	The following CommBiz Authority form is required to be signed by the Service Owner(s) to electronically authorized transactions set-up for the service.						
Enable a Transaction Type / Report	Service Delegate Authority Form						
Add an APCA ID	Please acknowledge the following before proceeding						
Add a Direct Debit Request	The service delegate authority form has been printed.						
Enable Foreign Exchange	Print All Documents	(ОК				
Service Delegate							
	Valid as at 18 Marc	:h 2009, 10:22:38 Sydney time.					
	© 2009 Commonwealth B	ank of Australia, ABN 48 123 123 124					
				~			
Done			🏹 😜 Internet	🔍 100% 🔹			

Printing and signing the forms

10. You can either open the PDF file to print the Service Delegate Authority Form or click the Print All Documents button.

- **11.** You must also check the tickbox confirming that you have printed the form.
- **12.** Sign the forms yourself, and ensure that the appropriate people in your organisation also sign them, then post the signed forms to:

CommBiz Reply Paid 332 Silverwater NSW 2128

13. Click the OK button and you will be returned to the Find Maintenance Request screen.