

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.

The screenshot shows the 'Find Maintenance Request' screen in the Commonwealth Bank CommBiz system. The page includes a search form with the following fields:

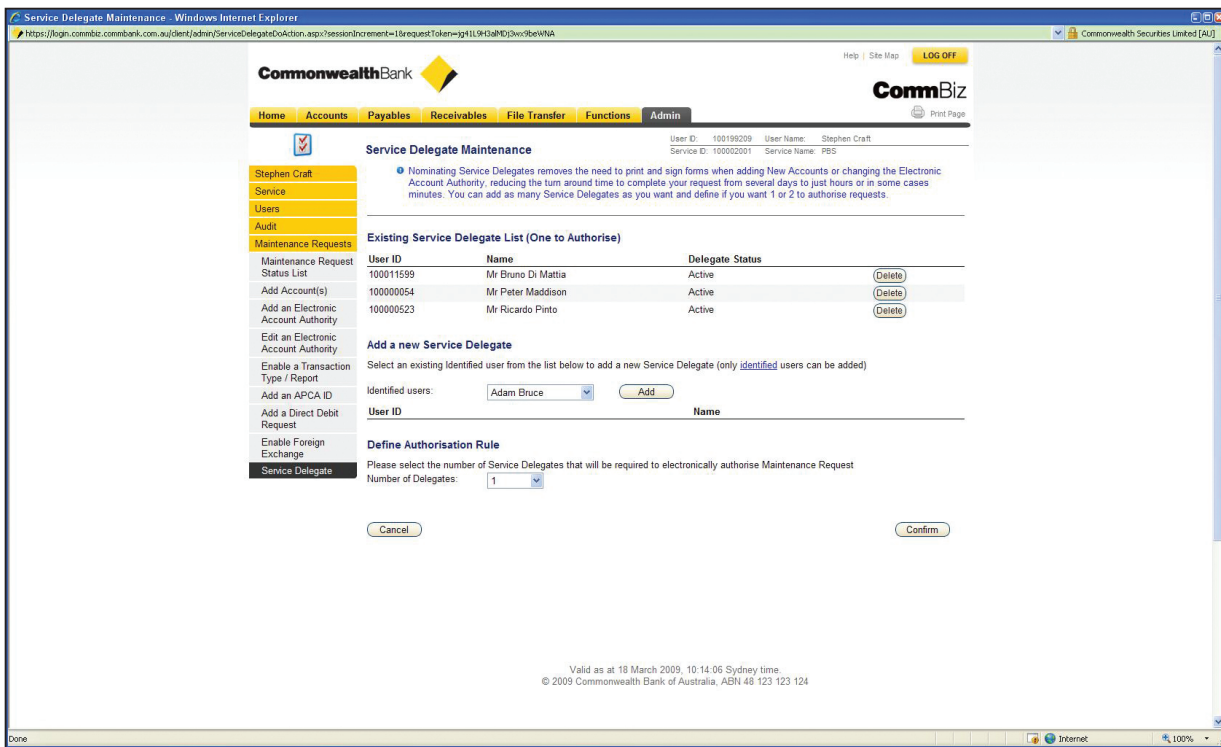
- Date: All, Exact: , From: , To:
- Request Type:
- Request Number: 100002001 -

Below the search form is a table of maintenance requests. The table has the following columns: Date Created, Request Number, Created By, Request Type, and Status. The table displays 10 rows of data, including requests for 'Identify a User', 'Edit an Electronic Account Authority', and 'Service Delegate Maintenance'.

Date Created	Request Number	Created By	Request Type	Status
17/03/2009 4:14:37 PM	100002001-345	Bank User	Identify a User	Cancelled
17/03/2009 4:03:48 PM	100002001-344	Robert Mac	Edit an Electronic Account Authority	Awaiting Authorisation
17/03/2009 3:17:18 PM	100002001-343	Bank User	Edit an Electronic Account Authority	Awaiting Authorisation
17/03/2009 3:14:32 PM	100002001-342	Bank User	Edit an Electronic Account Authority	Awaiting Authorisation
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

4. On the left-hand menu, click **Service Delegate**.

5. The **Service Delegate Maintenance** screen is displayed.



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.

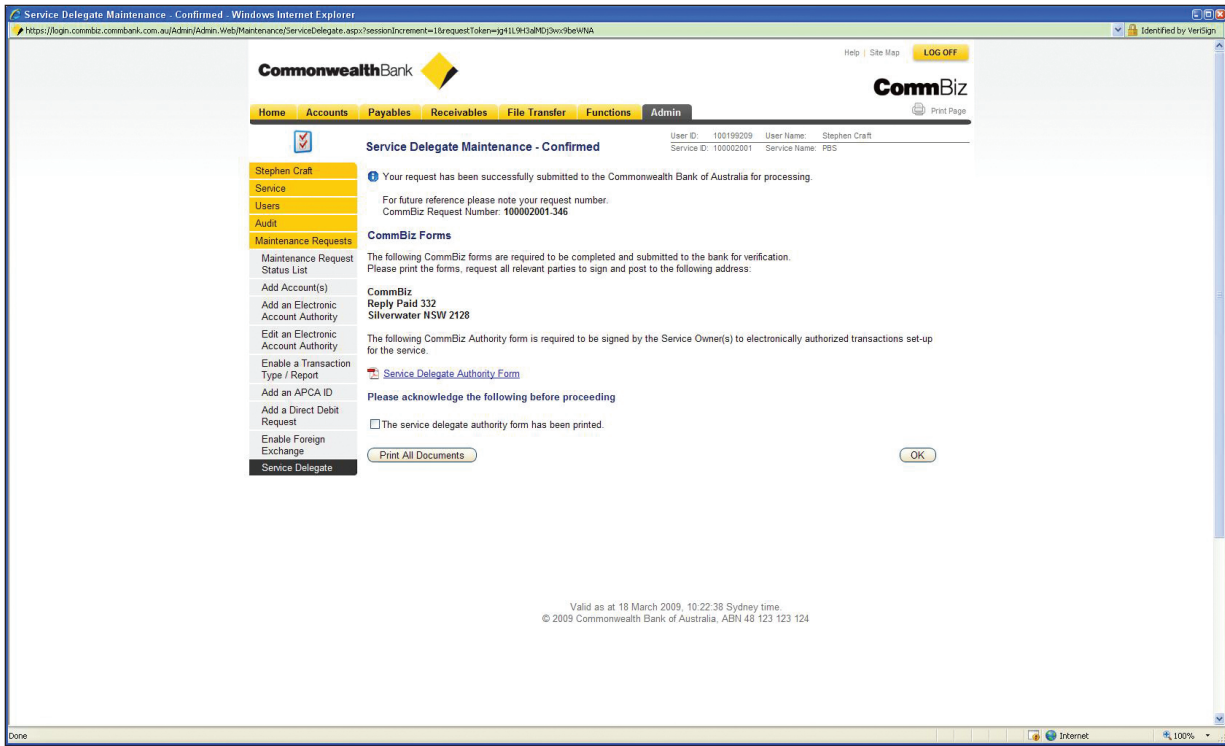
Defining the Authorisation Rule

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.



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.