more than money

Commercial Card Self Service Quick Reference Guide

How to access Commercial Card Self Service on NAB Connect

This Quick Reference Guide outlines how to request and manage access to **Commercial Card Self Service (CCSS)** on NAB Connect. CCSS is a real-time card administration platform available for NAB Corporate/Purchasing Card Accounts.

How to

1. **Apply for NAB Connect**
2. **Add one or more NAB Connect Administrators to your NAB Connect site**
3. **Add the CCSS service to your NAB Connect site**
4. **Add an Authorised Officer**
5. **Add new CCSS users – Full Access**
6. **Add new CCSS users – View Only Access**
7. **Submit Servicing Request**

Helpful Hint:

If you have an existing NAB Connect site, a NAB Connect Administrator and linked CCSS service, go directly to Step 5 to add new CCSS users.

1 Apply for NAB Connect

CCSS is accessed via the NAB Connect portal. Therefore, **NAB Connect** access **must** be in place prior to applying for CCSS access.

Apply for NAB Connect using one of the NAB Connect application options available on **nab.com.au/business/online-banking/nab-connect/paths-to-apply**.

Note: To get access to CCSS as part of your initial NAB Connect set up, complete the **NAB Connect Web Form**.

2 Add NAB Connect Administrators

A NAB Connect Administrator can perform a range of self-service functions in NAB Connect, including:

- Add or remove services, accounts, reports and other related items.
- Add, modify or remove General or Authorising users.
- Add, modify or remove access to available accounts, cards, merchant facilities and existing services for a user.

Add a NAB Connect Administrator to your NAB Connect site using the **NAB Connect Amendment Form**, available on **NAB Connect Help**.

3 Add CCSS Service

CCSS enables users with appropriate access to perform card administration and maintenance activities for one or more NAB Corporate/Purchasing Card Accounts. This includes being able to self-serve on the functions outlined in **Appendix 1**.

To add the CCSS service to an existing NAB Connect site contact your NAB Banker or specialist.

4 Add an Authorised Officer

Authorised Officer/s are responsible for all cardholder approvals and general maintenance activities on the Corporate Card Facility. Users with Full Access to CCSS **must be** Authorised Officers.

The NAB Corporate Card Facility Authorisations form is used to add new Authorised Officers which must be completed. This, including Identification and Verification checks must be completed and submitted to **corporatecardsupport@nab.com.au** by an existing Authorised Officer or NAB Banker.

Helpful Hint:

- Prior to submitting the form, the Authorised Officer will need to visit a NAB branch and provide identification documents to meet the identification and verification check. If you are unsure of whether a user has previously been identified by NAB, please contact your NAB Banker.

5 Add New CCSS Users – Full Access

Users with **Full Access** to CCSS can perform card maintenance activities such as order new cards, amend card limits, reorder card PINs, etc. They can also conduct company, cardholder and transaction searches and generate audit activity reporting. Identification and Verification by NAB is required.

The following pre-requisites are required **prior** to applying for full access:

- Full Access can only be provided to Authorised Officers. To set up a new user as an Authorised Officer, please refer to point 4 for instructions.
- Prior to requesting Full Access, please ensure the User has a NAB Connect User ID. Your NAB Connect Administrator can create a new General or Authorising user in NAB Connect via **Admin>Users** if this is not in place..

Once you have the prerequisites in place, an email needs to be sent from an existing Authorised Officer to **corporatecardsupport@nab.com.au** with the Full User Name, User NAB Connect User ID and Company ID.

6 Add New CCSS Users – View Only Access

Users with **View Only Access** to CCSS can conduct company, cardholder and transaction searches and generate audit activity reporting but cannot perform any card maintenance activities. Identification and Verification by NAB is not required.

Prior to requesting View Only Access, please ensure the User has a NAB Connect User ID. Your NAB Connect Administrator can create a new General or Authorising user in NAB Connect via **Admin > Users** if this is not in place.

Request for View only access can only be made from an existing Authorised Officer who, must email the request to **corporatecardsupport@nab.com.au** with the Full User Name, User NAB Connect User ID and Company ID.

7 Submit Service Request

- Users with **Full CCSS Access** will be able to self-serve majority of maintenance activities on the Company's NAB Corporate Cards in CCSS. Refer to **Appendix 1**. Self-serve provides real time updates.
- Users with **View Only CCSS Access** can perform company, cardholder and transaction searches and generate audit activity reporting in CCSS but cannot complete any card maintenance activities in CCSS.
- Requests that cannot be self-served need to be submitted via email to **corporatecardsupport@nab.com.au**. Refer to **Appendix 2**, Minimum Requirement guidelines which outlines who can submit the request and the submission requirements prior to making the request.

Helpful hint:

- The majority of the request types submitted via email to **corporatecardsupport@nab.com.au** will need to come from an Authorised Officer.

Need help?

For assistance with your NAB Connect site, please contact the NAB Connect Helpdesk on **1300 888 413**.

For help performing self-service functions in NAB Connect, please review the NAB Connect Administrator Quick Reference Guides available on **NAB Connect Help**.

For help accessing and using CCSS, please review the CCSS User Guide and instructional video available at **www.nab.com.au/CCSS**

Appendix 1 – Functions Available in CCSS

Users with Full Access can complete the following card administration and maintenance activities on the Company's NAB Corporate Cards in CCSS.

Request Types
Add a new cardholder
Search for a cardholder
Change a credit limit
Add or remove a temporary block on a card
Report a card permanently lost or stolen
Order a new plastic card
Permanently close a card
Request a PIN and/or restrict cash
Reset a PIN
Change a cardholder name
Change the embossed name on a card
Change a cardholder's contact details
Change a cardholder's address details
Change transaction limits
Perform a transaction search
Generate audit activity reporting
Email help
Change an account funding option – *Relevant for FlexiPurchase Dynamic Limit Management (DLM) clients only*

Appendix 2 – Minimum Requirements Guidelines

Request Types		Who can Submit	What we will need
Facility			
I want to add an Authorised Officer		Authorised Officer/ NAB Banker	• Completed **Corporate Card Facility Authorisation** Form
I want to remove/amend an Authorised Officer		Authorised Officer/ NAB Banker	• Company ID or Billing Account Number • Authorised Officer Name
I want to request CCSS access changes	• Reactivate CCSS User access • Add / Remove CCSS Users • Add facility to CCSS User • Change access level to view or full access • Add account reporting and statement access	Authorised Officer/ NAB Banker	• User Full Name - Must be an Authorised Officer for full access • NAB Connect User ID • Company ID or Billing Account Number • NAB Connect Administrator Approval (For Account Reporting and Statement Only)
Cards			
I want to make changes to my card **Helpful Hint:** The majority of these requests can be actioned in real time through CCSS	• Add/Remove stops on card • Report lost/stolen cards • Cancel / Reinstate cards • Overseas travel notification • Change card holder details e.g., address, employee number etc. • Transaction enquiries including fraud and disputes • Card Limit amendments • Reset a PIN • Order replacement cards • Statement request	Authorised Officer/ NAB Banker	• Card Holder Name • Last 4 digits of the card • Company ID or Billing Account Number
I want to add additional card holders	• Additional card holders	Authorised Officer/ NAB Banker	• Completed **Visa Corporate Card Cardholder Request** Form

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