Customer User Guide
QuickService

September 2015

Westpac

Customer User Guide
**Institutional
Bank**

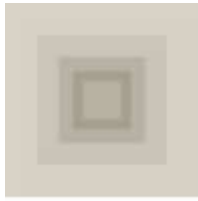# Tables of Contents

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Overview

What is QuickService?

The key functionalities of QuickService include:

- The ability to create, view, edit and attach documents to service requests that are related to a range of transactional banking services
- A home page which links all relevant service applications, forms and information in the one place along with links to existing portal, such as Corporate Online, Business Online and QuickStream
- Automated notification of service request status changes
- System guided pre-population of bank forms
- Online Authorisation

This Customer User Manual will provide you with guidance on how to login on to QuickService and navigate your requests.

These skills are fundamental for all users of QuickService.

About this Manual

Purpose
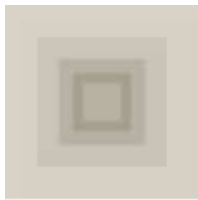
The purpose of this user manual is to detail the steps required to conduct all required tasks within QuickService Portal.

Audience

This user manual is for use by all members of your organisation that need to use QuickService to conduct their work, including:

- Administrators
- Team Managers
- Team Members

Assumptions

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It is assumed:

You have access to the internet

Access to one of the following desktop browsers;

- Internet Explorer 10+
- Chrome
- Mozilla Firefox
- Safari

Logging In

QuickService is a web-based application that runs within the QuickStream platform. You need a valid QuickService login in order to use the application.

Follow the steps below to log in to QuickService.

Go to the QuickService login page. The Sign In window will display.
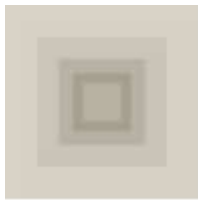

Complete your login details as per the following:
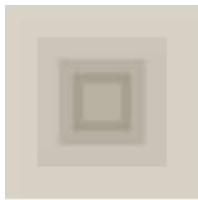
Login Name	Provided by your Administrator / Client Enquiry Manager
Password	Type your QuickService password. If logging in for the 1st time or after an Administrator has reset your password: • Type in the temporary password provided to you by your Administrator • The Change Password screen will display to prompt you to change your password to a new one • Your new password must contain at least 1 letter, at least 1 number and be at least 8 characters long. • If logging in for the first time, you will be prompted to set up SMS Reset Password, see SMS Reset Password for further information. • See Resetting your password for details of how to change your password.

At the bottom of the sign in page, select the 'Sign In' button. The Home Page will then display.

Service Requests Page

Once logged in, you will be presented with the Service Requests Page, depending on your user entiitlement you will have the following view;

- Dashboard for users with Manager entiltements or
- Service Requests Page for users with Team Member entitilments.

Dashboard

Managers have the ability to view all Service Requests loaded for their Organisation. The Dashboard allows you to search via Customer or Team Member.

Each field within QuickService that is underlined is a hyperlink to the data within each field. By selecting the hyperlink you will be presented with further information.

For example; to view Service Requests by individual Customer, select the Customer within the Dashboard

Dashboard Customer View

To view all Service Requests for all Customers, select 'View Service Requests'

To view Service Requests by Team Member, select the 'Team Member' radio button
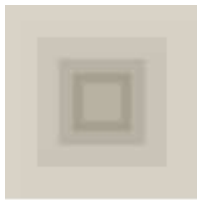
Dashboard Team Member View

At any time you wish to view the Dashboard, you can select the drop down menu and select 'Service Requests' then under the 'Service Request' menu on the left hand side, select 'Dashboard' as per below screenshot.

Create Request

Select the 'Create Request' option in the left-hand menu. The 'Create Service Request' page will display

Complete the details of the request in the 'Create Service Request' window:

Customer	Select the relevant customer from the drop-down list (if applicable).
Product/Service	Select the relevant Product or Service from the drop-down list. For example, should you wish to establish a new account, select 'Accounts' in this filed then 'Establish' in the 'Activity' drop down list.
Product Type	Select the relevant Product Type from the drop-down list (if applicable).
Activity	Select the relevant Activity from the drop-down list The selectable 'Activity' will depend on the 'Product or Service' selected Standard selection consists of the following;
	Amend A request to make changes to products or services
	Cancel A request to cancel a product or service
	Enquire An enquiry about product or service details or other information
	Establish/Create A request to provide a new product or service
User Reference	An additional identifier to help identify the request. For example, some users may use an

internal reference for their requests – this would be useful as a User Reference

For a full list of selectable Product / Service, Product Type and Activity selection options please refer to 'Product / Service List'

Select 'Next' to continue.

Enter your request into the free text box 'Action Notes' and select 'Finish' to continue.

The Service Request page loads with a status of 'Awaiting Documentation'

Review the request, at this stage, you have the following options;

- Delete
- Submit
- Add Attachment
- Add Comment

Select 'Submit' to continue.

The Service Request page loads with a status of 'Loaded'. The request is now sent to Westpac for actioning.

Service Requests

There are six tabs in the Service Requests view.

From any of these request lists, you can view request details. You can also sort requests within the list, filter which requests are displayed, or export request details to a spreadsheet (see details below).

Sorting Requests

Service Requests

Below are your draft service requests, these have not been submitted to Westpac.

| Draft (0) | Loaded (1) | In Progress (0) | Pending Your Action (0) | Completed | Search |

Draft Service Requests
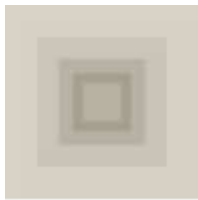
Number	Customer	Product / Service	Activity	Created Date ⬆	Created By	Status
			No records found.			

To sort the requests with a request list, select any of the headings. The requests will be re-sorted by the selected column, in ascending order. You can filter requests by Number, Customer, Product / Service, Activity, Created Date or Status.

To reverse the sort order, select the small grey arrow to the right of the column heading.

Each tab represents the each stage of a service request as follows;

Tab Name	Functionality
Draft	Requests that have been created by you, but not yet submitted.
Loaded	Requests that have been submitted but not yet actioned by Westpac
In Progress	Requests that are currently being worked on by Westpac.
Pending Your Action	Requests that require further action by you i.e. Documentation not signed / approval
Completed	Requests that have been completed by Westpac
Search	Enables you to search for a specific request—see *Searching for a Request*

Searching for a Request

There are two types of search:

- Quick Search
- Advanced Search

Using Quick Search
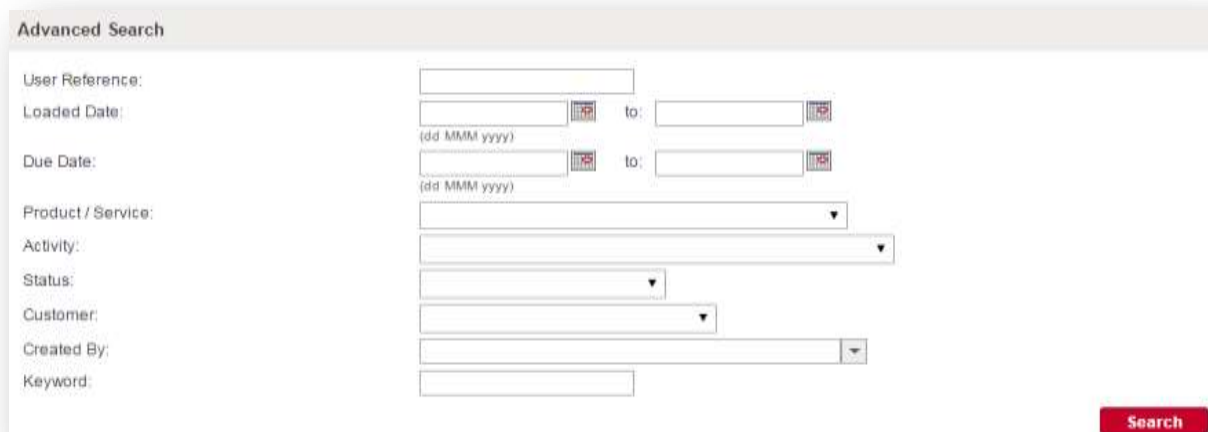
If you know the unique Service Request Number for a request, you can use Quick Search to view the details of that request.

Follow the steps below to use Quick Search:

- Position your cursor in the Quick Search field at the top of the Service Requests page
- Type the Number and select 'Go'
- The Service Request page will display, showing details for the specified request.

Using Advanced Search

Follow the steps below to perform an advance search for a specific request

In the Service Requests page, select the 'Search' tab

Complete one of more of the search criteria, as follows:

User Reference	Type text that may be contained in the User Reference
Loaded Date	Specify the date (or range of dates) on which the request was loaded. Select the calendar icons and select a 'from' and 'to' date from the pop-up calendars
Due Date	Specify the date (or range of dates) on which the request is due. Select the calendar icons and select a 'from' and 'to' date from the pop-up calendars
Product/Service	Select a product or service from the drop-down list
Activity	Select an activity from the drop-down list
Status	Select a status from the drop-down list
Customer	Select the Customer from the drop-down list
Created By	Start typing the name of the person who created the request. When the popup menu displays, select from the list of names
Keyword	Type text that may be contained in the Action Notes or in an e-Form request

Select 'Search' to continue

The Search tab of the Service Requests page will redisplay, listing all the service requests that match the specified search criteria.

Viewing Request Details

If the Service Requests page is not already displayed, showing a list of requests, select Service Requests in the menu area. To view request details:

Locate the request you want to view by:

- Searching for the request – see 'Searching For a Request'
- Sorting or filtering the request list – see 'Using Request Lists'

  In the request list, select the relevant request number in the Number column.

The Service Request screen will contain different buttons, depending on the status. The screen will always contain the following sections:

Request Information	Shows the key details of the request
Details	Shows any action notes about the request
Tabs	**Full History**
	A list of comments and attachments that have been added to the request, with data and time, as well as the name of the associated user
	Comments
	A list of comments added to the request, with date and time of the comment, as well as the name of the user who added the comment
	Attachments
	A list of all the files attached to the request by you – seeing 'Attaching Documentation'
	Changes
	Any status changes

Logging out

In the top right-hand corner of the QuickService page, select 'Sign Out'. This will close your sessions.
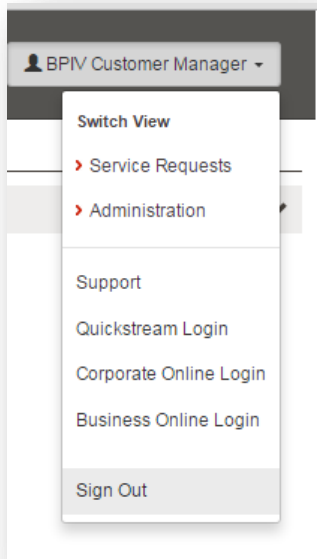
The Signed Out screen will display:
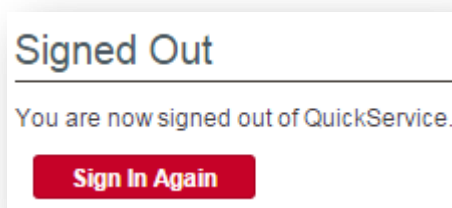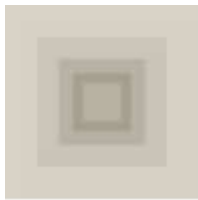
Your Password

Your Password may be managed in a number of ways, should you have forgotten your password, you may utilise our SMS Password Reset functionality. Below are some things you should be aware of regarding your password requirements;

- Your new password must contain at least 1 letter, at least 1 number, be at least 8 characters long and must not be the same as your old password.
- You are allowed five unsuccessful attempts to try your password – after that you will be locked out. If this happens, contact your nominated Administrator
- Your password must be changed every 42 days
- For further assistance contact your Client Enquiry Manager

Resetting Your Password

It is recommended for you to reset your password on a regular basis. To reset your password:

- Select the User Menu drop down in the top right hand corner

BPIV Customer Manager ▾
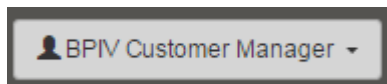
- Switch View to 'Administration'
- From the 'Administration' menu on the left hand side, select 'Change Password'

Change Password

Please enter your old password, then enter and confirm your new password. Your new password must contain at least 1 letter, at least 1 number, be at least 8 characters long and must not be the same as your old password.

All information with a ★ is mandatory.

Enter your new password

Login Name:	BPIV_CUSTMANAGER
★ Current Password:	
★ New Password:	
★ Confirm New Password:	
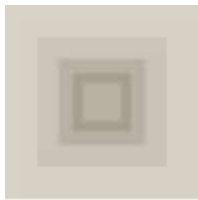
Save
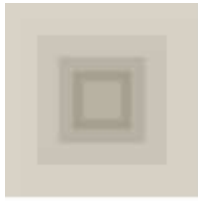
- Type your current password in the 'Current Password' field, and then type your new password in both the 'New Password' and 'Confirm New Password' fields. At the bottom of the page, select 'Save'.

SMS Password Reset

QuickService can provide you with an SMS code to enable you to reset your password in the even that you forget it. To enable your profile for this feature, when logging in for the first time, you will be presented with the following screen;

SMS Reset Password

QuickService can now provide you with an SMS code to help you reset your password in the event that you forget it. To enable your profile for this feature, please enter your mobile number and date of birth below. This information will be used solely for identifying you and sending your SMS code. To view our Privacy Policy, click here.

Mobile Number

Date of Birth

☐ Do not show this message again

Skip   **Save**

Key in your Mobile Number and Date of Birth. Should you choose not to set this facility up, you can select 'Skip' and you will be prompted each time you log in, otherwise, tick the box 'Do not show this message again'.

Should you decide to enable this feature at a late date or update your mobile number, this can be done any time when logged in, by selecting the 'Administration', then select 'My Profile' and 'Edit'.

Your mobile phone number and date of birth are only used to send you an SMS code in the event you have forgotten your password. Mobile Phone Number and Date of Birth must both be completed for the SMS code to be sent.

Mobile Phone and Date Of Birth

Your mobile phone number and date of birth are only used to send you an SMS code in the event you have forgotten your password. Mobile Phone Number and Date of Birth must both be completed for the SMS code to be sent.

Login Name: BPIV_CUSTMANAGER

Mobile Number:

Date of birth:
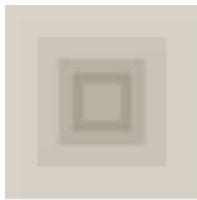
Forgotten Password?

Should you have forgotten your password and have set up the SMS Password Reset functionality, one the 'Sign In' page, select 'Forgotten Password' hyperlink.

You will then be presented with the following screen

Select 'reset your password' hyperlink to reset your QuickService Password.

Please note, should you have locked your account, you would need to contact your Administrator or your Client Enquiry Manger.

To reset your QuickService Password, please provide the following details;

Your Login Name & Your Date of Birth.
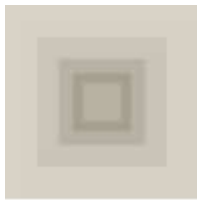
Your date of birth in the following format (DD MMM YYYY) Example, 20 Oct 1980. You may also enter your date of birth from the date picker by selecting the calendar icon.

'Clear' Button – this option will remove any information associated to the Login Name and Date of Birth fields.

'Cancel' Button – this option will take the user to the QuickService Login Page.

By selecting 'Continue', you will receive an SMS to the mobile number you have listed on your User Profile when enabling this functionality. Example of the SMS received below;

To reset your QuickService password enter this Westpac SMS code: 12ab34cd . We advise you to delete this message once you've entered the SMS code.

Enter the SMS code

Choose a new password

Please check your mobile phone for your 6-digit SMS code, then follow these steps to instantly reset your QuickService password.

Step 1. Enter SMS code

Your SMS code was sent to mobile phone number +61#######599 at 10:34 AEDT

Enter your SMS code [   ]

or send me a new SMS code

> Cancel   Clear   Go to Step 2

'Go to Step 2' Button – this option will take the user to the next screen.

'Clear' Button – this option will remove any information associated to the 'Enter your SMS code' field.

'Cancel' Button – this option will take the user to the QuickService Login Page.

Step 2. Enter a new password

Your new password must contain at least 1 letter, at least 1 number, be at least 8 characters long and not be the same as your old password.

Enter new password [   ]
Re-enter password [   ]

> Cancel   Clear   Submit

Complete the required information

- Enter new password
- Re-enter password

'Submit' Button – this option will take the user to the next screen.

'Clear' Button – this option will remove any information associated to the 'Enter your SMS code' field.

'Cancel' Button – this option will take the user to the QuickService Login Page.

On selecting 'Submit' the system will display the following screen:

We have reset your password

You can now sign in to Quick Service using your new password.

OK

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ABN 33 007 457 141

Westpac

Select 'OK' to continue to the Sign In page. Enter your Login and new Password to continue.

Attaching Documentation to a Request

QuickService enables you to attach relevant documentation (such as periodical payment details, bank cheques and cheque cashing authority) in commonly used document and image file formats.

Acceptable file extensions are: **png, tiff, tif, jpeg, jpg, gif, pdf, doc, dot, txt, docx, xls, xlsx**

Add Attachment

Number:	21042319
Customer:	Westpac Valued Parent Customer
Product / Service:	Bank Cheques
Activity:	Establish / Create
Status:	Assigned - Pending Action

Add Attachment

All information with a ★ is mandatory.

★ Attachment: Choose file No file chosen

Comment:

[Cancel]   [**Attach**]

Select 'Add Attachment'. The Service Request page will redisplay, and the attachment will be listed on the Attachments tab near the bottom of the page.

Cancel / Delete a Request

Service requests in 'Awaiting Documentation' or 'Draft' status can be deleted. Requests that have already been submitted to Westpac can only be deleted by your Client Enquiry Manager.

In the Details section of the Service Request screen, select 'Delete'. The Delete Service Request window will display.

To confirm, select 'Delete Service Request'. The request will disappear and you will be redirected back to the Service Request page.

Creating a Bank Cheque Request

Within the Requests Page, select 'Create Request' option in the left-hand menu. The Create Service Request page will display.

Create Service Request

A draft of this service request will be automatically saved when you click 'Next'.

All information with a ★ is mandatory.

★ Customer	Westpac Valued Parent Customer ▼
★ Product / Service	Bank Cheques ▼
★ Activity	Establish / Create ▼
User Reference	

Next

Complete the details of the request select 'Next' to continue.

Bank Cheque Request

A draft of this service request will be automatically saved when you click 'Next'.

All information with a ★ is mandatory.

Drawing Account

★ Account Name:	Westpac Valued Customer
★ BSB:	033000
★ Account Number:	123456

Fee Account

★ Fee Account:
- ◉ Same as drawing account
- ○ Different account

Bank Statement

★ Numeric Reference:
- ○ Yes, I will specify a reference
- ◉ No

Cancel   **Next**

Enter the Drawing Account, Fee Account and Bank Statement reference number details in the required mandatory fields.

Select 'Next' to continue.

Bank Cheque Request

A draft of this service request will be automatically saved when you click 'Next'.

All information with a ✶ is mandatory.

Bank Cheque Instructions (Maximum of 20)

Payee Name	Amount (AUD)	
John Smith	500	✖
		✖
Total:	**500.00**	

Add Payee

Back	Cancel		Next

Enter payee details and per cheque amount, select 'Next' to continue.

Bank Cheque Request

A draft of this service request will be automatically saved when you click 'Next'.

All information with a ✶ is mandatory.

Collection Details

✶ Date:	01 Jul 2015
	Format dd mm yyyy, e.g. '01 Jan 2009'
✶ Time:	13:00
✶ Branch:	150 Collins St (150 Collins
✶ State:	VIC ▾
✶ Name:	John Smith
✶ Type of ID required:	Driver's Licence ▾

Contact Details

✶ Name:	BPfV Test Customer March
✶ Phone:	0282544521
✶ Email:	
✶ Authorisers:	◯ Yes, I will specify the authorisers now
	◯ No, I will fill in the authoriser's details later

Special Instructions

Special Instructions:	

Back	Cancel		Next

Enter Collection and Contact details and any Special Instructions in the free text box available.

Select 'Next' to continue.

You will be presented with the conformation page, please confirm the details and then select 'Finish' to continue.

Bank Cheque Request

Please confirm the details below and click 'Finish'. You will not be able to edit this request once you have clicked 'Finish'.

Number of Cheques:	1
Total Value of Bank Cheques:	AUD 500.00
Total Bank Cheque Fees:	AUD 10.00
Total Debit Amount:	AUD 510.00
	FIVE HUNDRED AND TEN DOLLARS EXACTLY
Special Instructions:	

Back   Cancel   Finish

You are then prompted to select 'Download Form', print and sign the form as per the signatories for the debit account, then scan and attach to the service request.

Service Request

Before your request can be processed, you must send us a signed copy of the form. Click **Download Form** to download and print the form on your company letterhead. Have the account signatories sign it in the signature panel and scan the signed form and attach it by pressing **Add Attachment** below.

Request Information

Number:	21042004
User Reference:	
Customer:	Westpac Valued Parent Customer
Product / Service:	Bank Cheques
Activity:	Establish / Create
Status:	Awaiting Documentation
Created By:	BPIV Test Customer March Fourteen
Client Enquiry Manager:	Natalie Kandasamy
CEM Contact Number:	0478 312 165
Created Date:	Wed, 1/7/15 00:48
Forms:	http://www.westpac.com.au/corporate-banking/guidelines-and-forms/

Details

Number of Cheques:	1
Total Value of Bank Cheques:	AUD 500.00
Total Bank Cheque Fees:	AUD 10.00
Total Debit Amount:	AUD 510.00
	FIVE HUNDRED AND TEN DOLLARS EXACTLY
Special Instructions:	

Delete   Download Form

Full History | Comments (0) | Attachments (0) | Changes

Full History

Date	User	Description
Wed, 1/7/15 11:41	BPIV Test Customer March Fourteen	Status changed to Awaiting Documentation
Wed, 1/7/15 38:49	BPIV Test Customer March Fourteen	Status changed to Draft

Back   Add Attachment   Add Comment
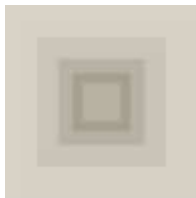
The form opens with the Bank Cheque details ready to be printed as follows:

Service Request Number	21042334
Contact Name	BPIV Test Customer March Fourteen
Contact Phone Address	0282544521
Date	

CUSTOMER NAME   Westpac Valued Customer

Bank Cheque Request - Disbursement details

Would you please prepare 1 Bank Cheque(s) as detailed below to be collected: -

AT BRANCH   State VIC

DATE REQUIRED: 01 Jul 2015   TIME REQUIRED: 13:00

Debit Instructions:

BSB	Account No	Account Details	Debit Description	Amount
034-001	309339	Westpac Valued Customer	Serial Number to be used:	500.00
034-001	309339	Westpac Valued Customer	1 x $10 = Total bank cheque fees	10.00
Total Debit Amount:		FIVE HUNDRED AND TEN DOLLARS EXACTLY		510.00

Bank Cheque Instructions:

	Payee Details	Amount (In Words)	Amount
1	John Smith	FIVE HUNDRED DOLLARS EXACTLY	500.00
	Total Value of Bank Cheques:	FIVE HUNDRED DOLLARS EXACTLY	500.00

NB: A representative of the customer / legal firm will collect bank cheque(s) at the time indicated. They have been advised to present proper identification to you.

Name of representative collecting cheque(s):   John Smith

ID to be used: Driver's Licence

Special Instructions:

Privacy Statement

Personal information

In order to process an application for a product or service for you or for a company of which you are a representative or signatory, or to provide or manage the provision of that product or service, we may collect personal information about you from you or that company. We may also use your personal information to comply with legislative or regulatory requirements in any jurisdiction, prevent fraud, crime or other activity that may cause harm in relation to our products or services and help us run our business.

If you do not provide all the information we request, we may need to reject that application or we may no longer be able to provide that product or service.

We may disclose your personal information to other members of the Westpac Group, anyone we engage to do something on our behalf, and other organisations that assist us with our business.

We may disclose your personal information to an entity which is located outside Australia. Details of the countries where the overseas recipients are likely to be located are in our privacy policy.

As a provider of financial services, we have obligations to disclose some personal information to government agencies and regulators in Australia, and in some cases offshore. We are not able to ensure that foreign government agencies or regulators will comply with Australian privacy laws, although they may have their own privacy laws. By using our products or services, you consent to these disclosures.

We are required or authorised to collect personal information from you by certain laws. Details of these laws are in our privacy policy.

Our privacy policy is available at westpac.com.au or by calling 132 032. It covers:
- how you can access the personal information we hold about you and ask for it to be corrected;
- how you may complain about a breach of the Australian Privacy Principles or a registered privacy code and how we will deal with your complaint;
- how we collect, hold, use and disclose your personal information in more detail.

We will update our privacy policy from time to time.

Other acknowledgements and consents

We may confirm the details of the information provided in this application.

Where you have provided information about another individual, you must make them aware of that fact and the contents of this Privacy Statement.
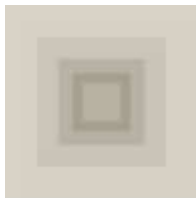
We will use or disclose your personal information to contact you or send you information about other products and services offered by the Westpac Group or its preferred suppliers. Please call us on 132 032 or visit any of our branches if you do not wish to receive marketing communications from us.

Definitions

"We", "our", "us", "Westpac" means Westpac Banking Corporation ABN 33 007 457 141. "Westpac Group" means Westpac Banking Corporation and its related bodies corporate from time to time.

Name of Authorised Signatory	Name of Authorised Signatory
Signature	Signature

Once signatories have authorised the document, it needs to be re-attached to the request. Select 'Add Attachment'. The 'Add Attachment' page displays.

Add Attachment

Number:	21042334
Customer:	Westpac Valued Parent Customer
Product / Service:	Bank Cheques
Activity:	Establish / Create
Status:	Awaiting Documentation

Add Attachment

All information with a * is mandatory.

* Attachment:	Choose file No file chosen
Comment:	

Cancel   Attach

Select Browse to search for the attachment saved. Select 'Add Attachment'.

Once attached, the 'Submit' button will be available. If satisfied with details of your request, click 'Submit' to send the request to Westpac.

Ensure correct attachment has been made, and select 'Submit' to continue.

Service Request Checklist

Before submitting this service request to Westpac, please ensure:

- You have attached all appropriate documents
- All attached documents have been signed by the appropriate authorisers

Cancel   Submit

Select 'Submit'.

Service Request

Request Information ⌄

Number:	21042334
User Reference:	
Customer:	Westpac Valued Parent Customer
Product / Service:	Bank Cheques
Activity:	Establish / Create
Status:	Loaded
Created By:	BPIV Test Customer March Fourteen
Client Enquiry Manager:	Natalie Kandasamy
CEM Contact Number:	0478 312 183
Loaded Date:	Wed, 1/7/15 11:46
Expected Due Date:	Wed, 1/7/15
Forms:	http://www.westpac.com.au/corporate-banking/guidelines-and-forms/

Details ⌄

Number of Cheques:	1
Total Value of Bank Cheques:	AUD 500.00
Total Bank Cheque Fees:	AUD 10.00
Total Debit Amount:	AUD 510.00
	FIVE HUNDRED AND TEN DOLLARS EXACTLY
Special Instructions:	

Full History | Comments (0) | Attachments (1) | Changes

Full History ⌄

Date	User	Description
Wed, 1/7/15 11:46	BPIV Test Customer March Fourteen	Status changed to Loaded
Wed, 1/7/15 11:44	BPIV Test Customer March Fourteen	dr.pdf
Wed, 1/7/15 11:41	BPIV Test Customer March Fourteen	Status changed to Awaiting Documentation
Wed, 1/7/15 08:48	BPIV Test Customer March Fourteen	Status changed to Draft

Back

Select 'Back' to return to the Service Request page. The request status has been changed to 'Loaded'.

Requesting Information – Pending Your Action

Occasionally, Westpac will require additional information.

You will receive an automated email from Westpac with the subject 'Pending Your Action – QuickService Request'.

In QuickService, select the Pending Your Action tab:

Select the Service Request from the list to display the details.

Details	⌄

Action Notes:

Hi Team
Can you please advise when our Term Deposit is due?
Cheers
Customer

:

Send Reply to Westpac

Full History	Comments (1, 1 new)	Attachments (0)	Changes

Full History ⌄

Date	User	Description
Thu, 9/7/15 08:45	Westpac	Status changed to Pending Your Action
Thu, 9/7/15 08:45	Natalie Kandasamy	Hi Customer Can you kindly provide the BSB & Account number of the Term Deposit? Regards, Natalie
Thu, 9/7/15 08:43	BPIV Test Customer March Fourteen	Status changed to In Progress
Thu, 9/7/15 08:43	BPIV Test Customer March Fourteen	Status changed to Awaiting Documentation
Thu, 9/7/15 08:42	BPIV Test Customer March Fourteen	Status changed to Draft

Back   **Add Attachment**   **Add Comment**

Your Westpac Client Enquiry Manager will have made comments outlining the information required from you. If you need to attach an updated document, select 'Add Attachment'. Otherwise, you can select 'Send Reply to Westpac'. You will be presented with a comments box to give your response.

Confirmation Your Request Has Been Completed

In the Details section of the Service Request screen, select the 'Completed' tab. All completed service requests from the last 15 months will display. You can view details of the requests by clicking on the service request number.

Number	Customer	Product / Service	Activity	Completed Date ↑	Created By	Status
21062626	Westpac Valued Parent Customer	Accounts - Term Deposits	Enquire	Thu, 9/7/15 08:49	BPIV Test Customer March Fourteen	Completed

Searching For a Service Request

You have 2 search options

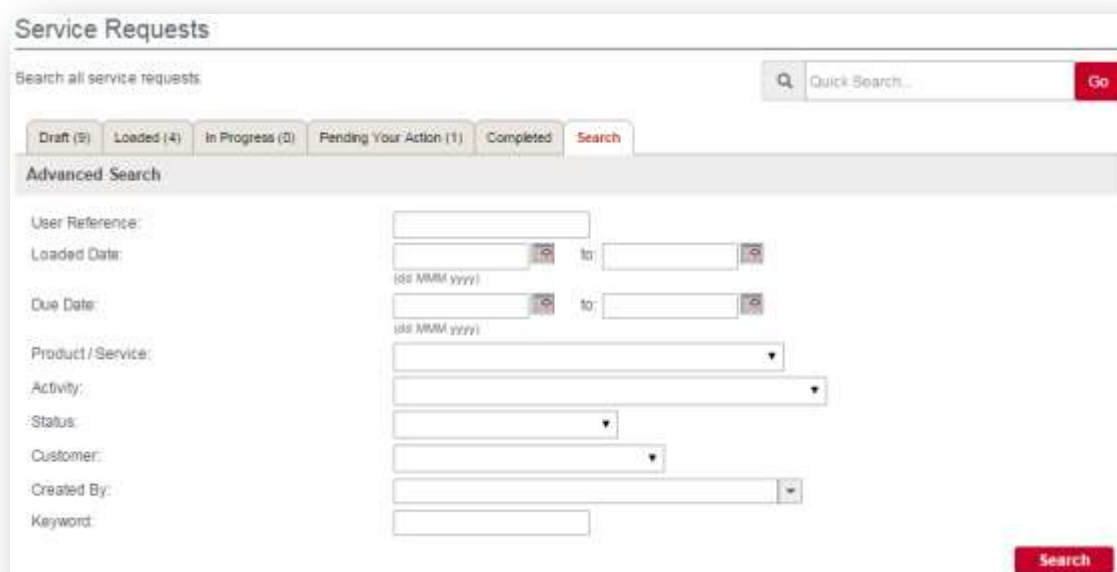- Quick Search
- Advanced Search

Quick Search

The Quick Search located within the 'Service Requests Menu' and is designed to search by QuickService reference number.

Key in the QuickService reference number and select 'Go'.

Advance Search

The advance search function allows you to search utilising one or more search options.

User Reference – When creating a Service Request you can enter in a User Reference; this can be used as a search option when using the Advanced Search function.

Loaded Date – Select a specific date or a date range

Due Date – Select a specific date or a date range

Product / Service – Select an option from the drop down list

Activity – Select an option from the drop down list

Status – Select an option from the drop down list

Customer – Select an option from the drop down list

Created By – Select an option from the drop down list

Keyword – Enter a keyword that has been entered in the main Action Note when creating the Service Request.

Select 'Search' to continue. You will be presented with a list of results meeting your search requirements.

Administration

Depending on your user entitlement, the Administration function is split into 5 main menus;

- Manage Users
- Customers
- Audit History
- Change Password
- My Profile

Users with the 'Administration' entitlement will have access to all administration functionality. All other users will have access to only Change Password & My Profile menus.

To access the 'Administration' menu, select the 'User Menu' and select 'Administration' from the drop down menu.
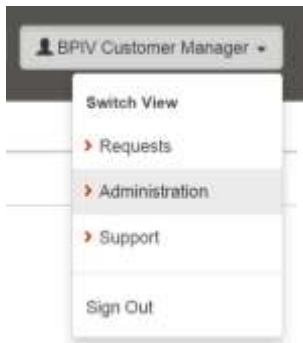
Manage Users

Provides you with an overview of all users within your QuickService portal. Within this page, you have the ability to Amend existing users, disable user access, create new users, reset passwords and export a list of users into a CSV file.

Customers

Provides you with an overview of all entities within your QuickService portal. Within this page, you have the ability to Opt in / Opt out of selected email notifications and select the Product & Services selectable when creating a Service Request.

Audit History

Provides you with an overview of administrative changes made at a User level or Entity level.

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Change Password

The functionality is available to all QuickService users. Allows users to change their own password.

My Profile

This functionality is available to all QuickService users, allows you to set up SMS password reset functionality and assign your Corporate Online 8 digit customer allowing Corporate Online Single Sign On.

Manage Users

Provides you with an overview of all users within your QuickService portal. Within this page, you have the ability to Amend existing users, disable user access, create new users, reset passwords and export a list of users into a CSV file.

Select the User to view details. From the User Details screen, you will be able to Edit the User Profile, Reset User Password and Disable the User.

Create New User

Login Name	Unique user identifier must be letters and numbers only. No spaces or characters. Cannot be modified, please ensure the Login Name is correct before saving.
Full Name	Full Name of user
Email	User's email address for notifications
Mobile	Users mobile contact number, also may be used for SMS password reset functionality
Date of Birth	Users date of birth for the purpose of SMS password reset functionality only
Customer	List of entities the user has access to
Role	The entitlement the user has access to per entity – Team Member or Manager entitlement

Once you have entered all required details, select 'Save'. A Temporary Password will be generated and is to be provided to the new user.

Select the User to view details. From this User Details screen, you will be able to Edit the User Profile, Reset

Manage Users

Below are the users registered in the system. Click the username link to see more details about each user.

🔍 | Search Users... | **Go**

Users				Page 1 of 1
Full Name	**Login Name**	**Email**	**Customer**	**Status**
AFS Customer Admin	AFSADMIN	quickservice@westpac.com.au	Multiple	Active
APPROVER A	BPIV_APPROVER_A	pp_staging@qvalent.com	Multiple	Active
APPROVER B	BPIV_APPROVER_B	pp_staging@qvalent.com	Multiple	Active
BPIV Customer Admin	BPIV_CUSTOMERADMIN	pp_staging@qvalent.com	BPIV Parent Company	Active
BPIV Customer Manager	BPIV_CUSTMANAGER	pp_staging@qvalent.com	Westpac Valued Parent Customer	Active
bpiv customer team member	BPIV_CUSTTEAMMEMBER	pp_staging@qvalent.com	BPIV Parent Company	Active
BPIV Test Customer March Fourteen	BPIV_CUSTMARCH14	pp_staging@qvalent.com	Multiple	Active

Start of list Previous 20   *Next 20 End of list*

Create New User   **Export**

User Password and Disable the User

User Details

User Details

Login Name:	11223344
Full Name:	John Smith
Phone:	03 9123 4567
Mobile:	03 9123 4567
Dob:	
Email:	quickservice@westpac.com.au
Status:	Active

Roles

Customer	Role
BPIV Parent Company	Manager

Back   **Edit**   **Reset Password**   **Disable User**

Please note, although you may be the Organisation Administrator, you are unable to administer any users that have the following entitlements; Administrator, Signatory, Verifying Officer and Online Approver or access to an entity you are not an Administrator for.

Edit Customer

You can modify the User Details and User entitlements.

Edit Existing User

Modify the details for an existing user.

All information with a ★ is mandatory.

User Details

	Login Name:	11223344
★	Full Name	John Smith
★	Email	quickservice@westpac.com
★	Phone	03 9123 4567
	Mobile	
	Date of birth	

Roles

Customer	Role	
BPIV Parent Company	Manager ▼	🗑
Add Customer: ▼	Add	

Cancel   Save

Amend User Details

All fields are editable with the exception of the 'Login Name'. Once created this cannot be changed.

Select the Calendar icon, this will allow you to enter the users Date of Birth.

Roles

To add additional entitlements and / or entities to the selected users profile, select the drop down arrow in the 'Add Customer' field and select the entity you require the user to have access to then select 'Add'.

Select the 'Role' drop down arrow to select the entitlement for the select entity.

Should you wish to 'Delete' access to an entity / entitlement, select the 'Bin' icon.

Select 'Save' to continue.

Reset User Password

Select 'Reset Password' button, confirm the password reset. Provide the user with their Temporary Password

Select 'Reset Password'

Provide the Temporary Password to the user.

Disable User

Select 'Disable User', confirm you have you would like to disable the users access as they will no longer have access to QuickService.

User can be reactivated by resetting their password.

Confirm Disable User

Please ensure you are disabling this user correctly as they will no longer have access to this system

Disable User

Login Name:	11223344
Full Name:	John Smith
Email:	quickservice@westpac.com.au
Phone:	03 9123 4567

Cancel   **Disable User**

Confirm and select 'Disable User'

User Details

User Details

Login Name:	11223344
Full Name:	John Smith
Phone:	03 9123 4567
Mobile:	03 9123 4567
Dob:	
Email:	quickservice@westpac.com.au
Status:	Disabled by administrator. Reset Password to allow login.

Roles

Customer	Role
BPIV Parent Company	Manager

Back   **Edit**   **Reset Password**

Customers

To access the 'Administration' menu, select the 'User Menu' and select 'Administration' from the drop down menu.
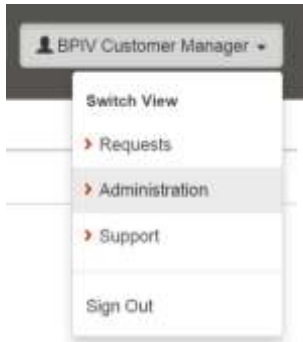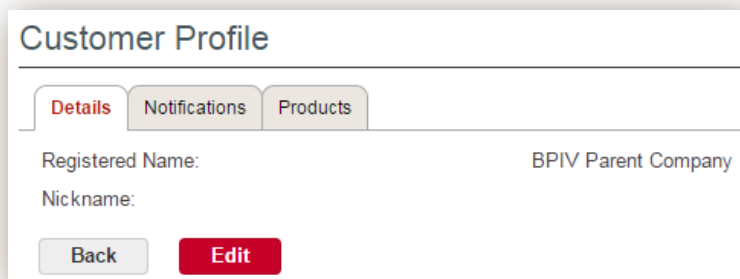
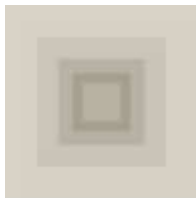Select 'Customers' from the Administration menu on the left hand side.

From this page, you have the ability to view and modify the Entities you have access to as an Administrator.

To view or modify the Entity profile for each customer you have access to select the 'Customer' menu and then select the required customer under the 'Registered Name'

Notifications - ability to Opt In / Opt Out of the email notifications received.

To modify, select 'edit' and select the options you would like to apply to your Organisation.

Products - You have the ability to amend the Product / Service options available to users when creating a Service Request.

To modify, select 'Edit' and select the options you would like to apply to your Organisation.

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Audit History

The Audit History page will provide you with an overview of Administrative changes applied to your organisation.

To access 'Audit History', select the 'Administration' menu, select the 'User Menu' and select 'Administration' from the drop down menu.
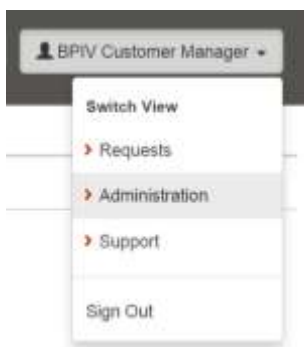
Select 'Audit History' from the Administration menu on the left hand side.

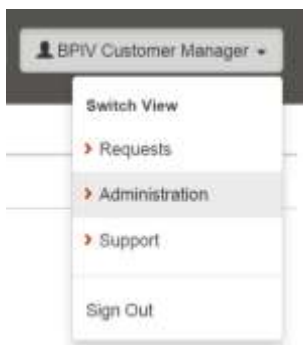| Date	Date and Time of event
Type	Type of change
Record Changed	The User the change was applied to
Description	Details of the change
User	The user who made the changes

Change Password

The functionality is available to all QuickService users. Allows users to change their own password.

To access 'Change Password', select the 'Administration' menu, select the 'User Menu' and select 'Administration' from the drop down menu.

Then select 'Change Password' from the Administration menu on the left hand side.

Enter you old password then enter and confirm your new password. Select 'save' to continue.

My Profile

This functionality is available to all QuickService users, allow you to set up SMS password reset functionality and assign your Corporate Online 8 digit customer allowing Corporate Online Single Sign On.

To access 'My Profile', select the 'Administration' menu, select the 'User Menu' and select 'Administration' from the drop down menu.

Then select 'My Profile' from the Administration menu on the left hand side.

Refer to SMS Password Reset for further details regarding the requirements for Mobile Phone and Date of Birth.

Refer to Corporate Online Single Sign On for further details regarding the requirements for Corporate Online

SMS Password Reset

The SMS Password Reset functionality allows a user to receive a password reset via SMS should they have forgotten their password. This function is only available when you have forgotten your password. You will have 5 attempts and on the 5th your account will be locked out. Once you are 'Locked Out' you will your password to be reset by your Administrator or your Westpac Banking Representative.

When first logging into QuickService, you will be asked if you would like to set up this functionality.

To participate in the SMS Password Reset functionality, enter your Mobile Number and Date of Birth.

Select the 'Calendar' icon to enter your date of birth from the date picker.

Should you not wish to participate at this stage, select 'Skip', select 'Do not show this message again' otherwise you will be asked each time you login,

Should you decide to change this at any stage, go to 'My Profile' within the Administration menu and update your details.

Select 'Save' to continue.

To reset your password by SMS

Within the Sign In page, select the 'Forgotten Password' link

Select the 'Reset your password here' link

Enter the required information

'Continue'– this option will take you to the next screen.

'Clear'– this option will remove any information entered in the Login Name and Date of Birth fields.

'Cancel'– this option will take you back to the QuickService Login Page.

On selecting 'Continue' the system will send you an SMS with the following message:

To reset your QuickService password enter this Westpac SMS code: 12ab34cd. We advise you to delete this message once you've entered the SMS code.

On selecting 'Continue' the system will display the following details:

Choose a new password

Please check your mobile phone for your 6-Digit SMS code, then follow these steps to instantly reset your QuickService password

Step 1: Enter SMS code
Your SMS code was sent to mobile phone number +61••••••599 at 15.49 AEDT

All information with a * is mandatory

* Enter your SMS code [   ]

or send me a new SMS code

Cancel   Clear   Go to Step 2

Enter your SMS code

'Go to Step 2'– this option will take you to the next screen.

'Clear'– this option will remove any information entered in the 'Enter your SMS code' field.

'Cancel'– this option will take you back to the QuickService Login Page.

If the SMS code has expired you can get another SMS code by selecting '**send me a new SMS code**' link.

On selecting 'Go to Step 2' the system will display the following details:

Choose a new password

Step 2. Enter a new password
Your new password must contain at least 1 letter, at least 1 number, be at least 8 characters long and not be the same as your old password.

All information with a * is mandatory

* Enter new password [   ]
* Re-enter password [   ]

Cancel   Clear   Submit

Enter and re-enter your new password

'Submit'– this option will take you to the next screen.

'Clear'– this option will clear any information entered in the 'Enter your SMS code' field.

'Cancel'– this option will take you back to the QuickService Login Page.

On selecting 'Submit' the system will display the following screen:

Select 'OK' to return to the login page.

Corporate Online Single Sign On

Customer Users who have access to both QuickService and Corporate Online and utilise their '8 Digit Customer Number' as their logon they will have the ability to access QuickService via Corporate Online.

To set up this new functionality, the first time a Customer User selects the QuickService link in Corporate Online they will be directed to the QuickService login page, they will be required to enter their login and password, thereafter sign in will be automatic.

Please note, at present there is no Single Sign On from QuickService to Corporate Online

To link your Corporate Online 8 digit customer number to your QuickService profile, select the 'User Menu' and select 'Administration' from the drop down menu.
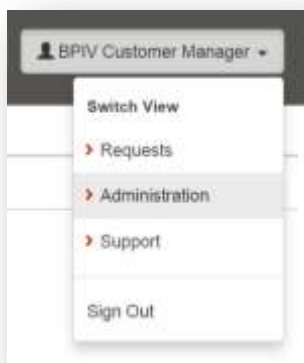
Then select 'My Profile' from the Administration menu on the left hand side.

Enter your Corporate Online 8 digit customer number and select 'Save' to continued.

Once logged into Corporate Online, select the QuickService link within the Main Menu.

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By selecting the 'QuickService' link within Corporate Online, the QuickService sign in page will open in a new tab as per below;

Enter your QuickService Login Name and Password.

Once signed in, you will be presented with the Service Requests page.
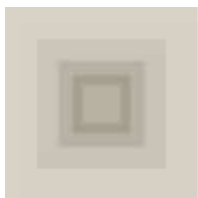
Additional Information

Glossary

Action Note	Field to add instructions
CEM Relationship Owner	The client services person who owns the relationship with the client
Client Services	An industry-aligned client management, sales and service unit specialising in the provision of cash management and working capital solutions for institutional and corporate clients
e-Forms	Populated via QuickService when loading a request Bank Cheque (Establish) Cheque Cash Authority (Establish, Amend, or Cancel) Periodical Payments (Amend or Cancel) Account Opening Notice of Authority Payment Processing Service (PPS) Direct Entry (DE) Bpay Transactional Enquiries Westpac has a number of Customer Forms Websites that have been set up for specific customers. A full list of these sites can be found on the Westpac intranet: http://www.westpac.com.au/corporate-banking/guidelines-and-forms/
Portal	A web portal or links page is a web site that functions as a point of access to information in the World Wide Web. A portal presents information from diverse sources in a unified way
QuickService	Online service portal to cater for service requests that are currently handled by GTS Client Service
Service Request	A record of requirements for service
User Reference	A free format field in a service request that a client can input a description to help them identify their particular request
Dashboard Summary View	QuickService enables you to display a summary of current requests by all team member(s).

Status Meanings

Status	Definition
Draft	A draft is an e-Form request that has not yet been completed by you
Awaiting Documentation	Any request that to awaiting documentation prior to being submitted to Westpac
Loaded	The request has been submitted by not yet actioned by Westpac
In Progress	The request has been assigned to your Client Enquiry Manager, but they have not started working on it yet Note: An **Auto Email** is sent from QuickService notifying you that your service request has been received by Westpac and is currently in progress
Pending Your Action	A request that requires further action by you, for example, documentation not signed/incorrect signatories Or a request that requires Authorisation / Approval. Note: An **Auto Email** is sent from QuickService notifying you that more information is required
Completed	The request has been completed and the customer has been notified.

User Entitlements

Role	Description & Functionality
Administrator	They are a special type of user that works with the QuickService to configure user access & entitlements. Users with this entitlement can do the following; Create, Amend and Disable Team Members / Manager users. Reset passwords for Team Members / Managers. Manage the email notifications and product / service selection at an Organisation level. Please note, once a user has any of the following entitlements assigned to them, Administrators will not be able to manage their profile and must be managed by Westpac; • Administrator • Online Authorisation Approver • Authorised Signatory • Verifying Officer
Manager	Have an overall view of service requests raised by team member users. View service requests; update service requests
Team Member	Raise service requests through the QuickService; view & update own service requests.
Online Authorisation Approver	Approvers requests under the Online Authorisation model. This user is appointed

	by Directors by completing the QuickService Delegation of Authority. Currently, this user role has the ability to approve the following; • Establish New Accounts • Establish, Amend or Cancel a Direct Entry, Bpay and PPS Facility.
Verifying Officer	Commercial Cards Only. Responsible for the 'Approval' of 'Commercial Cards' requests via the QuickService Portal (must also be nominated as a Team Member or Manager).
Authorised Signatory	Commercial Cards Only. Responsible for the identification of New Card holder requests (must also be nominated as a Team Member or Manager).

Email Confirmation Examples

Email: Service Request in Progress

Dear Sir/Madam,

Westpac will never send you an email asking for your personal details or link to a sign-in page. Before accessing emails or the Internet, always update your virus protection, firewall and operating systems software.

Your service request has been received by Westpac and is currently in progress. The details of this request are as follows:

Service Request Number: 341002
Customer Name: BPIV Sub Company
Customer Enquiry Manager Name: BPIV CEM ES
Customer Enquiry Manager Phone: 0282531997
Expected Due Date: Mon, 14/11/11
Product / Service: Bank Cheques
Activity: Establish / Create
User Reference: BPIV 1 SMW

You can view more details about this service request on the QuickService website.

Regards,

GTS Client Service

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Email: Pending Your Action

Dear Sir/Madam,

Westpac will never send you an email asking for your personal details or link to a sign-in page. Before accessing emails or the Internet, always update your virus protection, firewall and operating systems software.

The following service request is pending your action. Login to QuickService to view more details.

Service Request Number:
Customer Name:
Customer Enquiry Manager Name:
Customer Enquiry Manager Phone:

Regards,

GTS Client Service

Product / Service List

Product / Service	Product Type	Activity	
Accounts		Amend Cancel Establish / Create Enquire	
Accounts – Foreign Currency Accounts		Amend Cancel Establish / Create Enquire	
Accounts – Segments		Amend Cancel Establish / Create Enquire	
Account / Signatories & verifying Officers	Account Signatories Verifying Officers	Amend Cancel Establish / Create Enquire	
Accounts – Term Deposits		Amend Cancel Establish / Create Enquire	
Audit Certificates		Amend Cancel Establish / Create Enquire	
Australia Post		Amend Cancel Establish / Create Enquire	
Auto Transfer / Replenishment (ATR)		Amend Cancel Establish / Create	

		Enquire	
Bank Cheques		Amend Cancel Establish / Create Enquire	
Billing or Fee Enquires		Amend Cancel Establish / Create Enquire	
Bpay		Amend Cancel Establish / Create Enquire	
Business Express Deposits (BEDS)		Amend Cancel Establish / Create Enquire	
Business Online		Amend Cancel Establish / Create Enquire	
Cheque Cashing Authorities		Amend Cancel Establish / Create Enquire	
Commercial Cards	Corporate Cards Employee Benefit Cards Purchasing Cards Virtual Purchasing Cards	Add Facility Hierarchy Structure Cancel Card Cardholder Application Change Card Credit Limit Change Card Transaction Limit and Merchant Restrictions Change Cardholder Address Changing Fax Indemnity Dispute Transaction Enquire	

		Facility Maintenance	
		Nominate Authorised Signatory / Verifying Officer	
		PIN Issue	
		Refund Fees	
		Reissue Card	
		Request Cardholder Statement	
		Request Company Report	
		Request Direct Debit	
		Setup Electronic Reporting	
		Transfer of Credit Balance	
		Transfer of Credit Incorrectly Paid to Card	
		Transferring Card to Another Reporting Level	
Corporate Online (COL)		Amend Cancel Establish / Create Enquire	
Direct Entry		Amend Cancel Establish / Create Enquire	
Dishonors		Amend Cancel Establish / Create Enquire	
Foreign Currency - Cash		Amend Cancel Establish / Create Enquire	
Foreign Currency – Drafts		Amend Cancel Establish / Create Enquire	
Merchant Chargebacks		Amend	

		Cancel	
		Establish / Create	
		Enquire	
Merchant Facilities e.g. EFTPOS		Amend	
		Cancel	
		Establish / Create	
		Enquire	
Other		Amend	
		Cancel	
		Establish / Create	
		Enquire	
Payment Processing Service (PPS)		Amend	
		Cancel	
		Establish / Create	
		Enquire	
Payment Processing Service (PPS) – NZ		Amend	
		Cancel	
		Establish / Create	
		Enquire	
Payments – International		Amend	
		Cancel	
		Establish / Create	
		Enquire	
Periodical Payments (PP's)		Amend	
		Cancel	
		Establish / Create	
		Enquire	
Remittance Processing Service (Retail Locked Box)		Amend	
		Cancel	
		Establish / Create	
		Enquire	
WIBS		Amend	
		Cancel	
		Establish / Create	
		Enquire	
QuickService		Amend	

		Cancel	
		Establish / Create	
		Enquire	
Transaction Enquiry		Business Express Deposits	
		Deposit Book	
		Duplicate Statements	
		encoding Error	
		Recall of Funds	
		Stop	
		Trace of Funds	
		Transaction Enquiry	
		Voucher Retrievals	
		Business Express Deposits	
		Deposit Book	
		Duplicate Statements	
		encoding Error	
		Recall of Funds	
		Stop	
		Trace of Funds	
		Transaction Enquiry	
		Voucher Retrievals	
Value Transaction Request		Amend	
		Cancel	
		Establish / Create	
		Enquire	