

Digital Forms

Go to the Westpac Forms Site where you obtain Westpac forms. Should you not have the link, please contact your Westpac Representative.

Click on the [Online Smart Form Link](#)

1. Select Open New form

- Enter company details
- Add Business Registered Address
- Product Selection
- Authority Execution (refer to the screenshot on the right). This refers to the authorisation that is to be used or already in place for your organisation, e.g. two company directors or a director and secretary.

☐ click Submit

Note: If Corporate Online (COL) is not selected, in the Product Selection section, an additional question will be added to determine if new products are to be added on to an existing COL. This will also cover third party authorisation.

2. The form initiator will receive a link to the session via email.

3. The form initiator to complete the Smart Form. You can switch from one product to another anytime.

4. Upon completion of each product, click Submit. The form will automatically move to the next product selected in step 3.

*Note: After completion of each product, a tick **will populate** before the product, (e.g. Account Opening) which indicates that this particular section has already been completed. Refer to screenshot 4.*

Note: You can cancel a product type within the bundle at anytime by clicking the cancel button at the bottom of each page, for example, if you decide that you do not wish to open direct entry facilities anymore, you can click the cancel button located at the bottom within the direct entry facility page, you can also re-instate the product back at anytime prior to submitting the bundle. Refer to screenshot 4a.

Select **'Save for Later'** if you would like to save the session and resume at a later stage.

5. Once all product sections have been completed and submitted:

- Click 'Generate Document'
- Click 'Download Document'
- Print the document
- Ensure the form is signed by the company's authorised representative
- Send the Online Smart form to your Westpac Representative as one document.

How to complete the Online Smart Form – Customer Initiated

1 Product Triage Corporate

Open New Form

Open Saved Form

Login and Open Form

Authority Execution

Which option will you be signing under? *

☐ Organisation is an Australian Company (Registered with ASIC) ?

☐ Non Company Organisation ?

☐ Power of Attorney ?

☐ Delegation of Authority ?

Please provide a confirmation email address for these forms to be sent to upon completion

Email *

Submit >

Email confirmation

2 Westpac Institutional Bank

Request Confirmation

A Product Request has been confirmed for the customer:

ABC Pty Ltd

To access the Product(s) specified for this customer:

1. [Click here to open the Product form\(s\)](#)

2. Enter the reference code: **ZB6FP2**

3 Switch Product ▲

☒ **Account Opening**

☐ Direct Entry

☐ Corporate Online

☐ Smart Merchant

☐ Corporate Cards

Select the product you wish to open.

4 Switch Product ▲

☒ Account Opening

☒ **Direct Entry**

☐ Corporate Online

☐ Smart Merchant

Select the product you wish to open.

4a Cancel Save for later Continue

5 Product Confirmation Sign document

Signatures

Product Document - ABC Pty Ltd

Please generate, download and sign document.

Generate Document

Product Confirmation Sign document

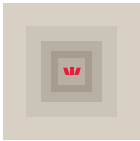
Signatures

Product Document - ABC Pty Ltd

Please generate, download and sign document.

Download Document

You can switch from one product to another by using this arrow



Digital Forms

You will receive two emails from your Westpac Representative:

[Online Smart Form Link](#)

1. With the link
2. With the Passcode

[Click on the link and use the Passcode provided.](#)

1. Complete the form.

Note: You can switch from one product to another at any time.

❏ **click Submit**

2. Upon completion of each product, click Submit. The form will automatically move to the next product.

*Note: After completion of each product, a tick **will populate** before the product, (e.g. Account Opening) which indicates that this particular section has already been completed. Refer to screenshot no. 2.*

Note: You can cancel a product type within the bundle at anytime by clicking the cancel button at the bottom of each page, for example, if you decide that you do not wish to open direct entry facilities anymore, you can click the cancel button located at the bottom within the direct entry facility page, you can also re-instate the product back at anytime prior to submitting the bundle. Refer to screenshot 4.

Select **'Save for Later'** if you would like to save the session and resume at a later stage.

3. Once all product sections have been completed and submitted:

- Click 'Generate Document'
- Click 'Download Document'
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- Ensure the form is signed by the company's authorised representative
- Send the Online Smart form to your Westpac Representative as one document.

How to complete the Online Smart Form – Bank Initiated

1

Westpac Institutional Banking
Fast, secure online account opening

• Up to 5 accounts can be created at a time and all accounts must be linked to a Notice of Authority.
• To change an existing account's Notice of Authority select "Setup a notice of authority for an existing account".

Would you like to: *

☒ Open a new account(s)

☐ Open a new joint account(s)

☐ Set up a new notice of authority for an existing account

☐ Nominate new verifying officer(s) to identify account signatories

Organisation name *

ABC Pty Ltd

ABN, ACN or ARBN

I

Submit >

Email confirmation

2

Switch Product ▲

☒ [Account Opening](#)

☒ [Direct Entry](#)

☐ [Corporate Online](#)

☐ [Smart Merchant](#)

Select the product you wish to open.

You can switch from one product to another by using this arrow.

3

Product Confirmation
Sign document

Signatures

Product Document - ABC Pty Ltd

Please generate, download and sign document.

Generate Document

Product Confirmation
Sign document

Signatures

Product Document - ABC Pty Ltd

Please generate, download and sign document.

Download Document

4

Cancel Save for later Continue