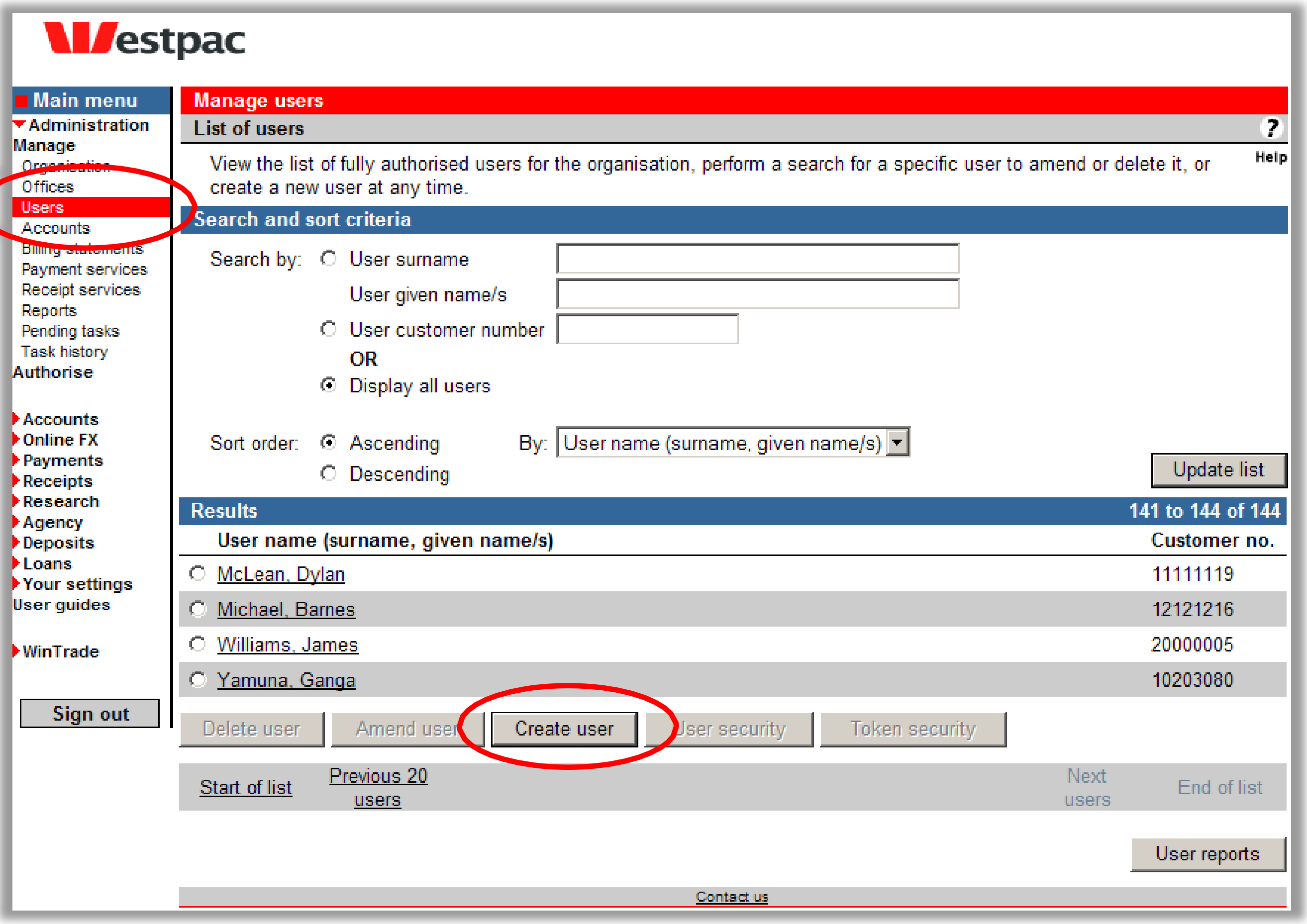
Creating a new user

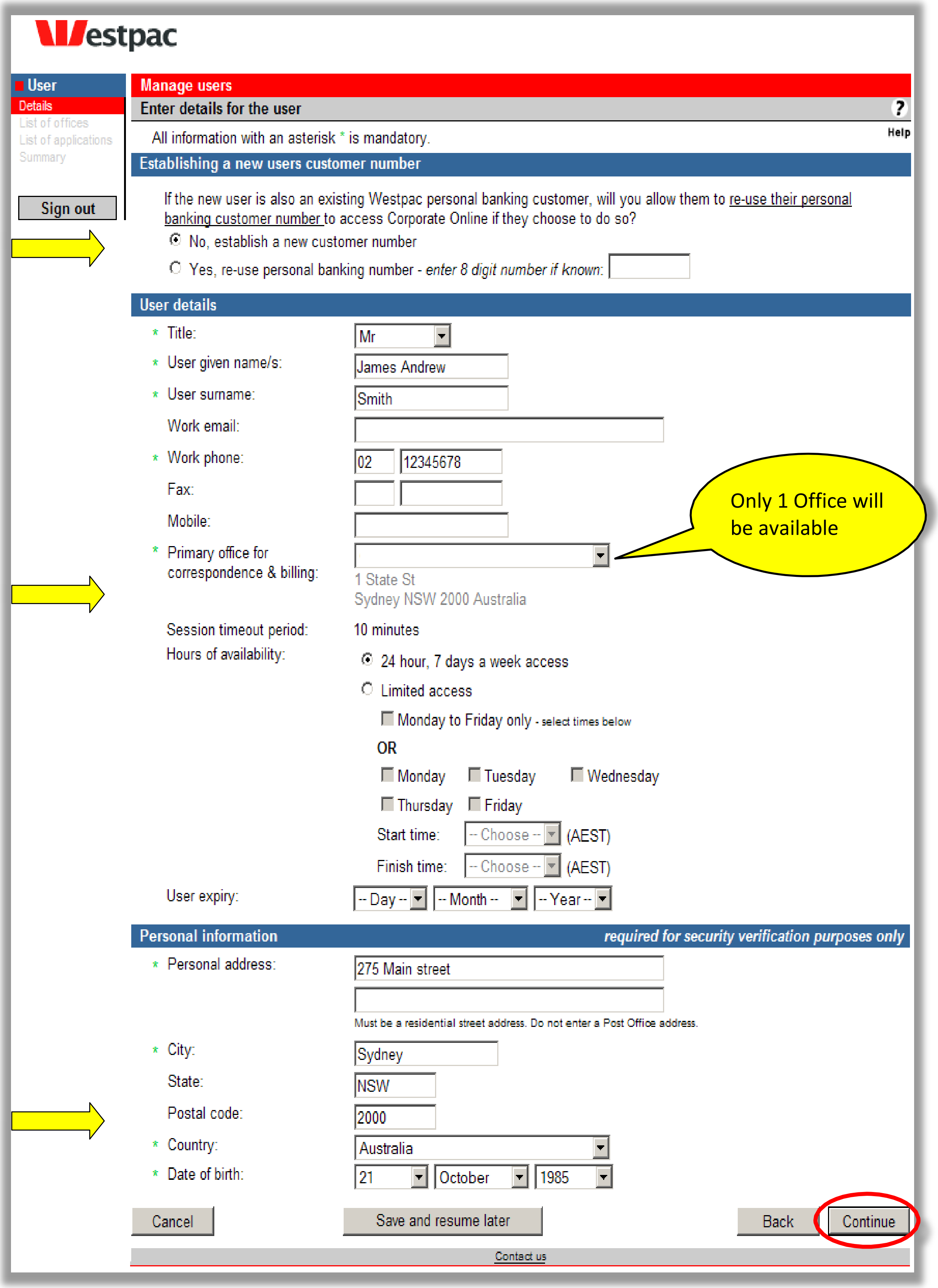
Please note: Only Super Administrators (Principal) can create a new user

Step 1 – Select the **Administration** application from the left-hand menu, followed by **Users** under the Manage heading within Administration.



Step 2 – Click the **Create user** button.

Step 3 – Enter the **details of the new user** and then click the **Continue** button.



Westpac

User
Details
List of offices
List of applications
Summary

Sign out

Manage users

Enter details for the user ? Help

All information with an asterisk * is mandatory.

Establishing a new users customer number

If the new user is also an existing Westpac personal banking customer, will you allow them to re-use their personal banking customer number to access Corporate Online if they choose to do so?

(•) No, establish a new customer number

( ) Yes, re-use personal banking number - *enter 8 digit number if known*:

User details

* Title:	Mr
* User given name/s:	James Andrew
* User surname:	Smith
Work email:	
* Work phone:	02 12345678
Fax:	
Mobile:	
* Primary office for correspondence & billing:	1 State St Sydney NSW 2000 Australia
Session timeout period:	10 minutes
Hours of availability:	(•) 24 hour, 7 days a week access ( ) Limited access [ ] Monday to Friday only - select times below OR [ ] Monday [ ] Tuesday [ ] Wednesday [ ] Thursday [ ] Friday Start time: -- Choose -- (AEST) Finish time: -- Choose -- (AEST)
User expiry:	-- Day -- -- Month -- -- Year --

Only 1 Office will be available

Personal information *required for security verification purposes only*

* Personal address:	275 Main street Must be a residential street address. Do not enter a Post Office address.
* City:	Sydney
State:	NSW
Postal code:	2000
* Country:	Australia
* Date of birth:	21 October 1985

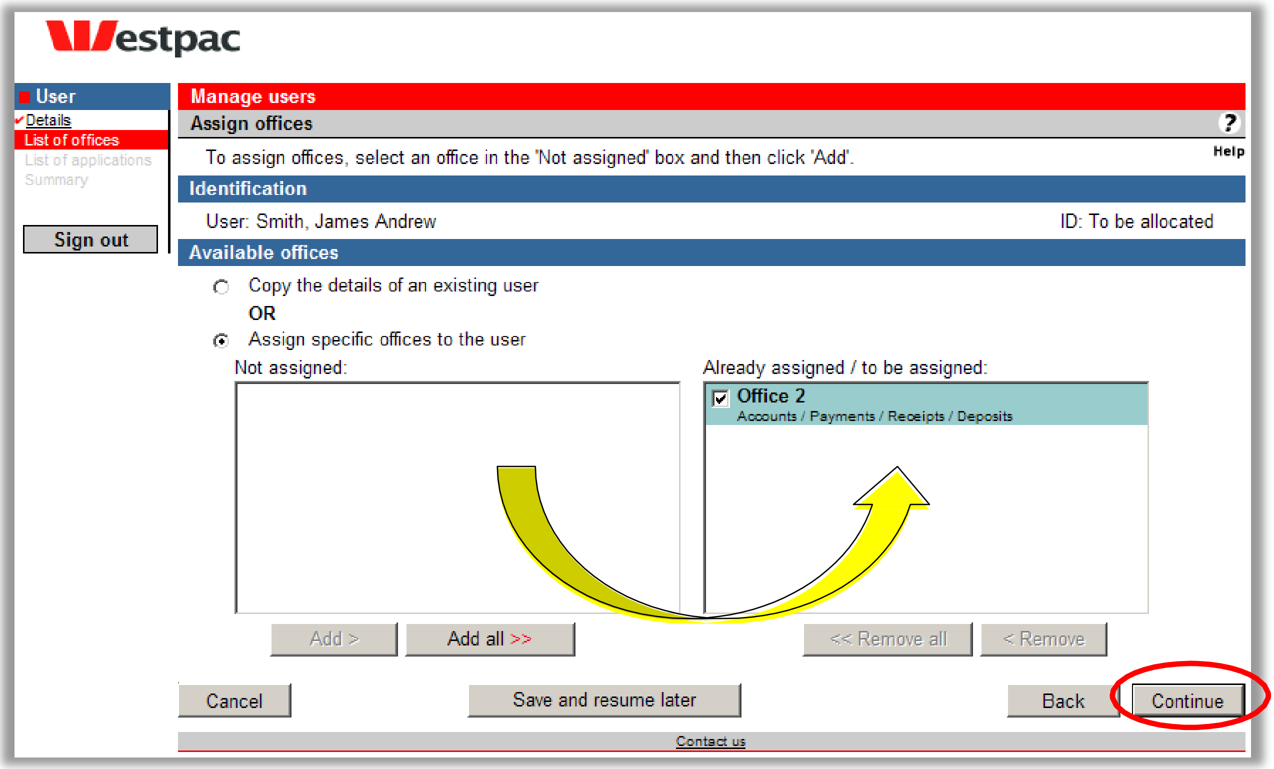
Cancel | Save and resume later | Back | Continue

Contact us

Creating a new user (continued)

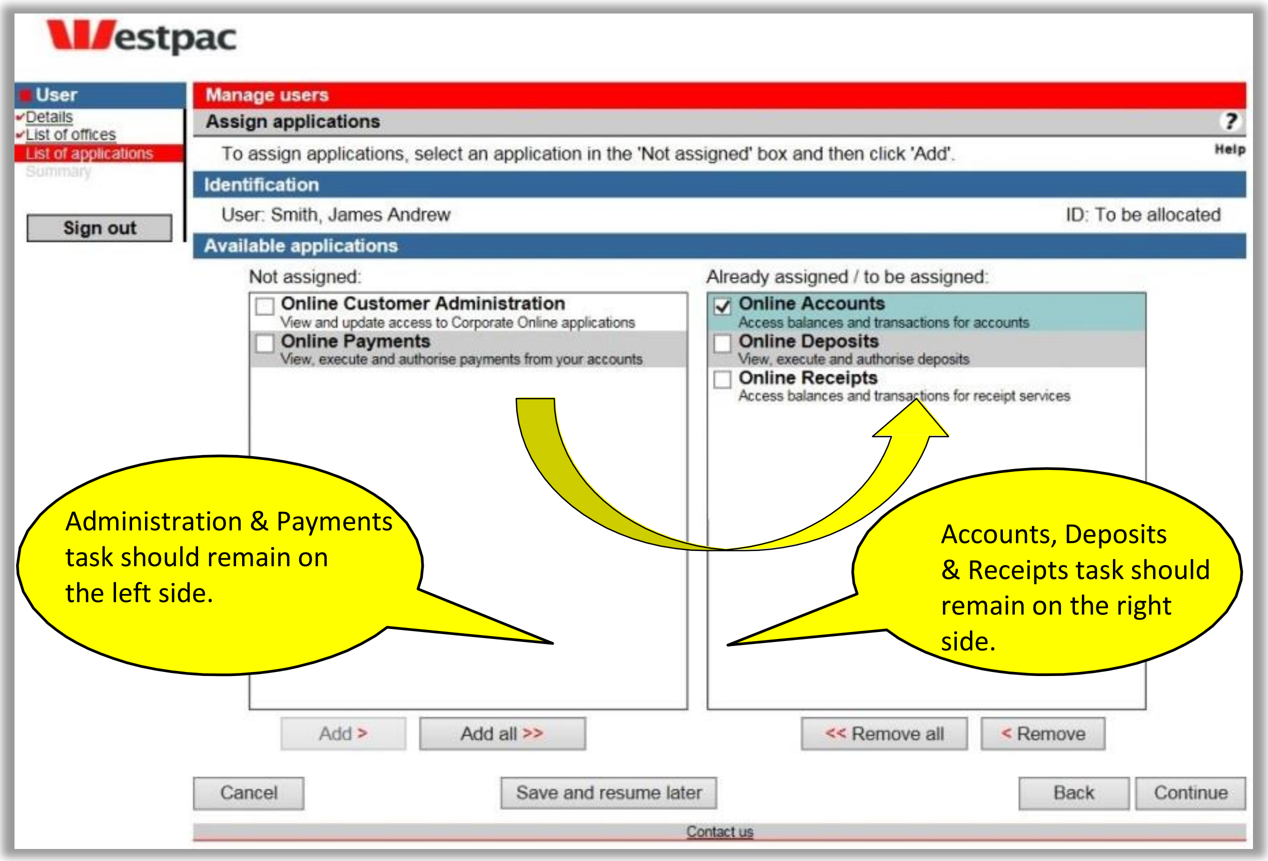
A guide for Corporate Online Administrators

Step 4 – Select the **Offices** to be assigned to the new user and then click the **Continue** button.



Step 5 – Select the **applications** to be assigned to the user and then click the **Continue** button.

Complete Steps 6 to 11 which will be displayed based on the applications chosen.

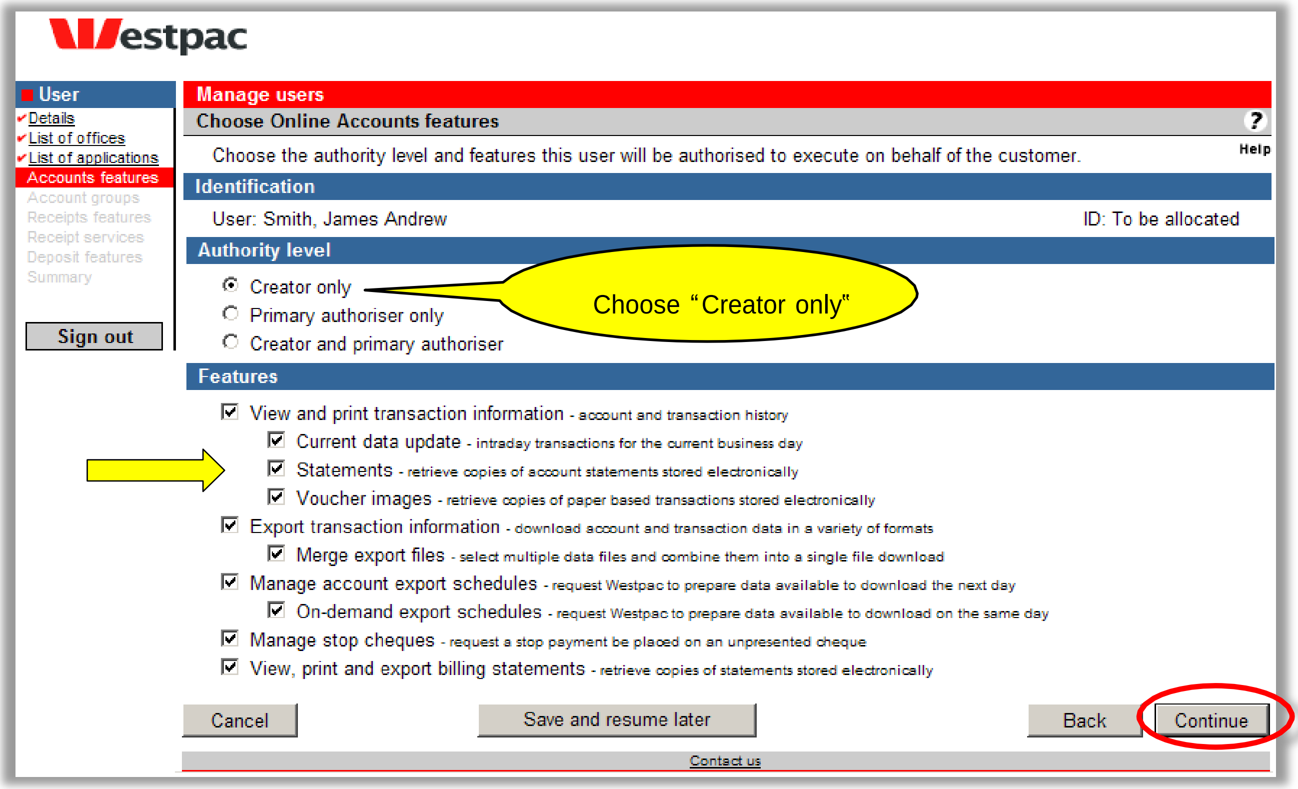


Note: To establish a new principal as an Administrator please email: nsw_government_schools@westpac.com.au

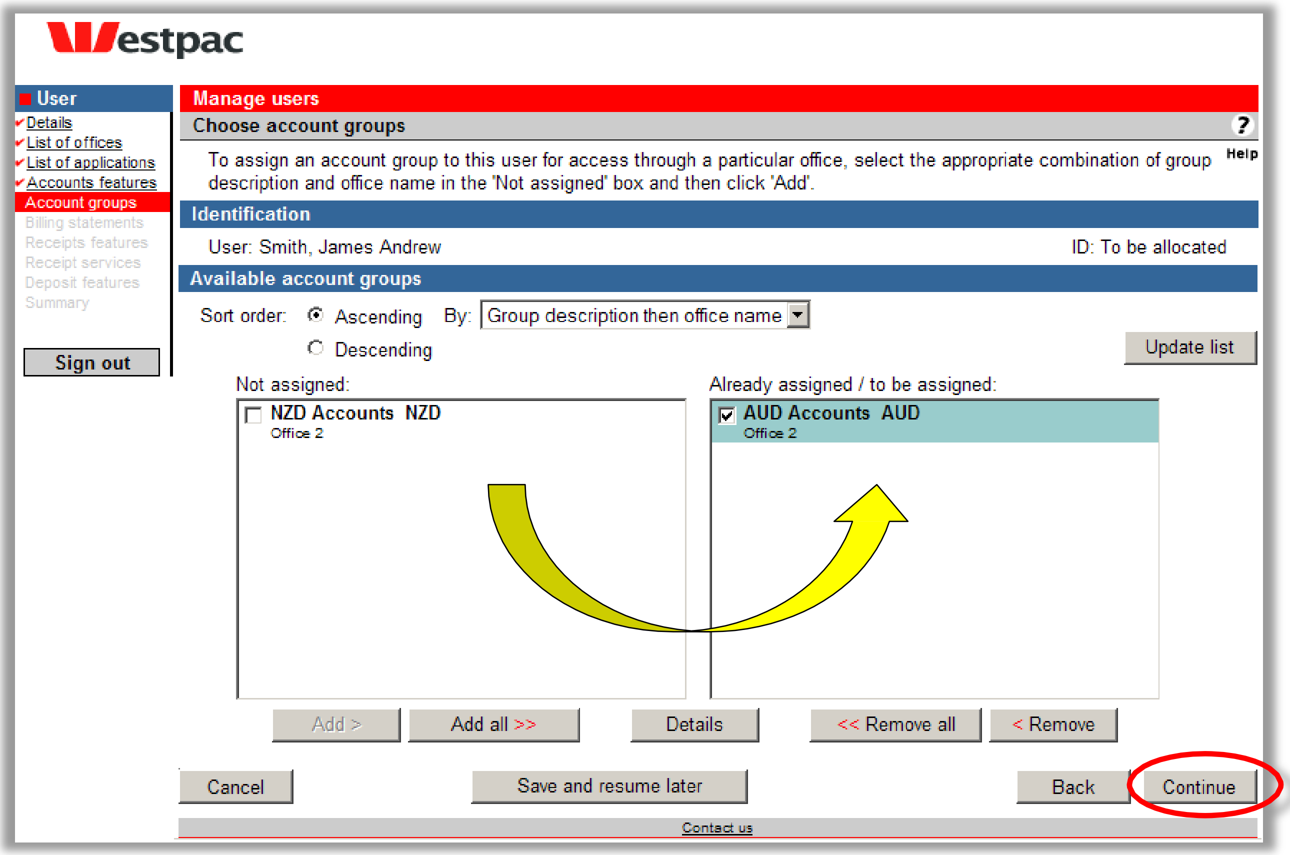
Creating a new user (continued)

A guide for Corporate Online Administrators

Step 6 – Select the **authority level** and **features** to be assigned to the user for **Online Accounts** then click the **Continue** button.



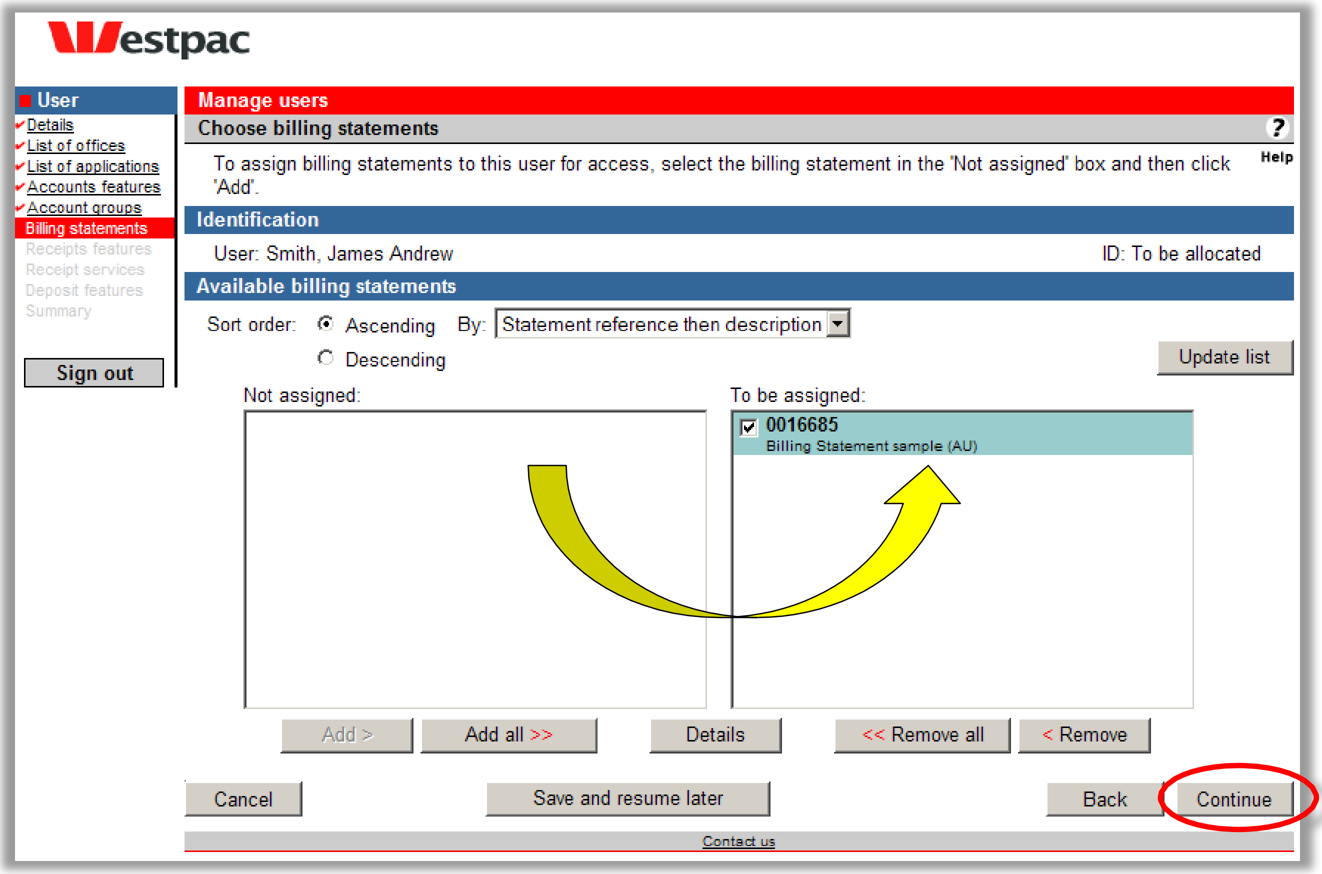
Step 7 – Select the **Account groups** to be assigned to the new user and then click the **Continue** button.



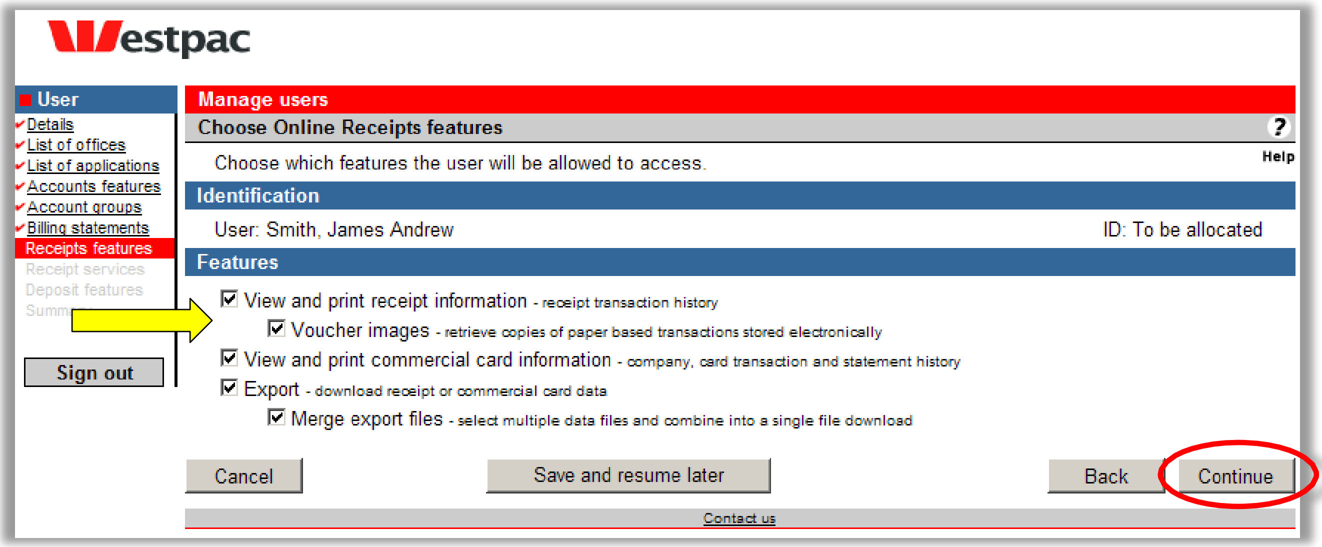
Creating a new user (continued)

A guide for Corporate Online Administrators

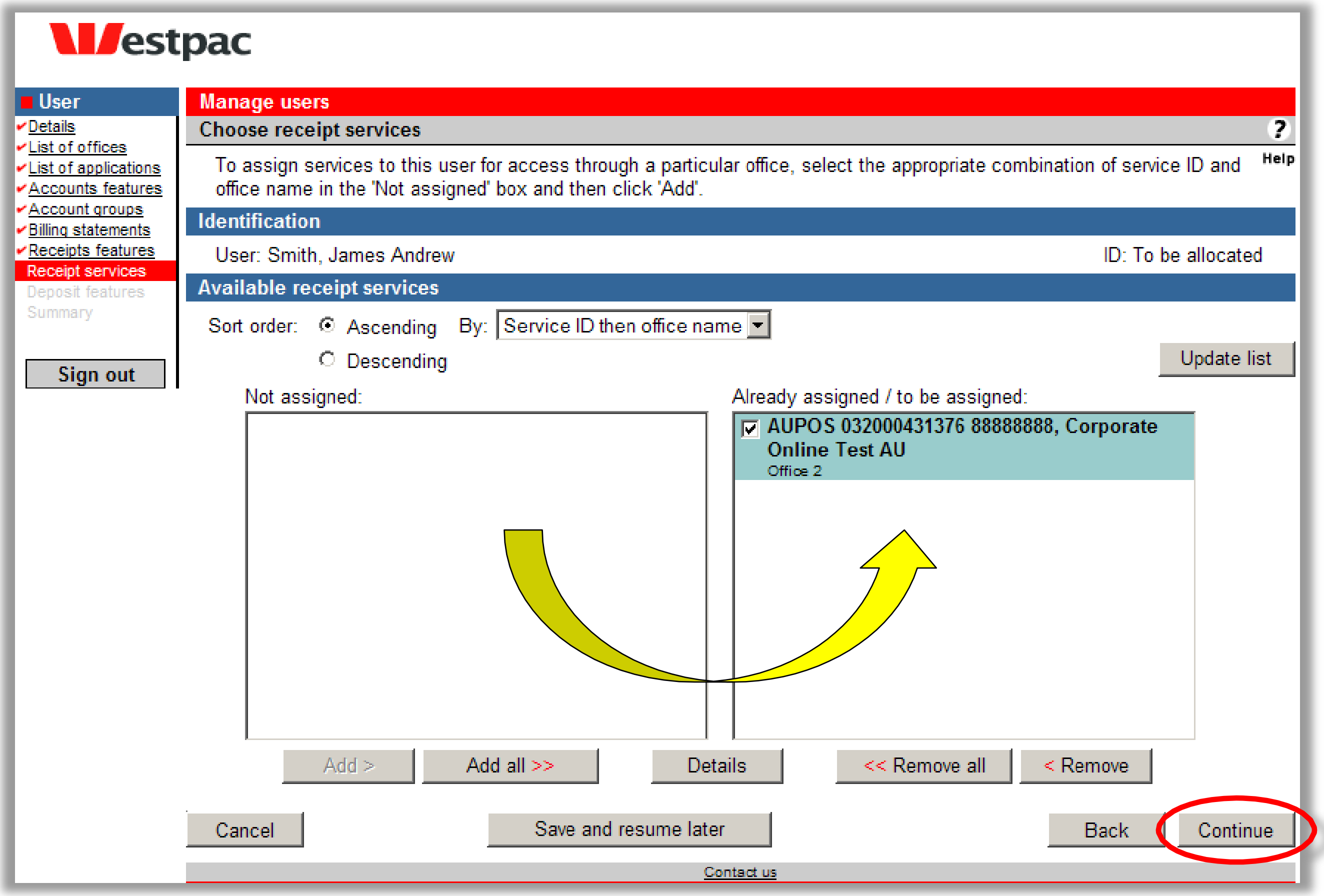
Step 8 – Select the **Billing statements** to be assigned to the new user and then click the **Continue** button.



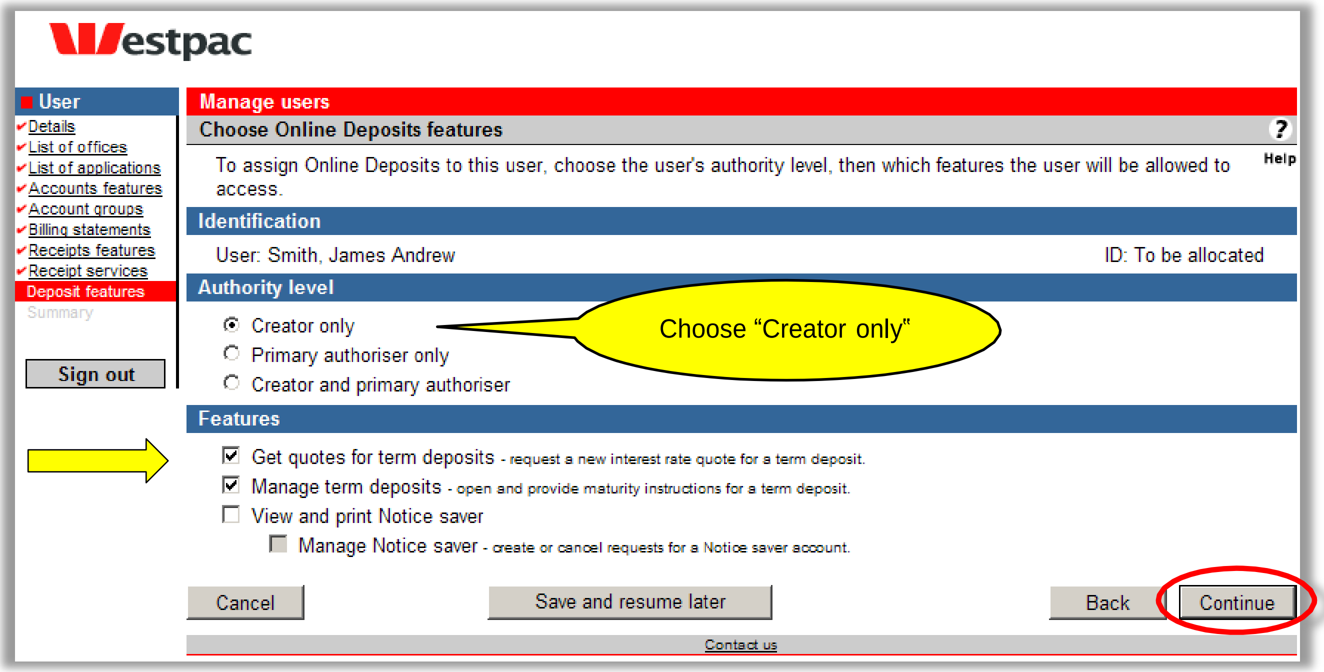
Step 9 – Select the **features** to be assigned to the user for **Online Receipts** then click the **Continue** button.



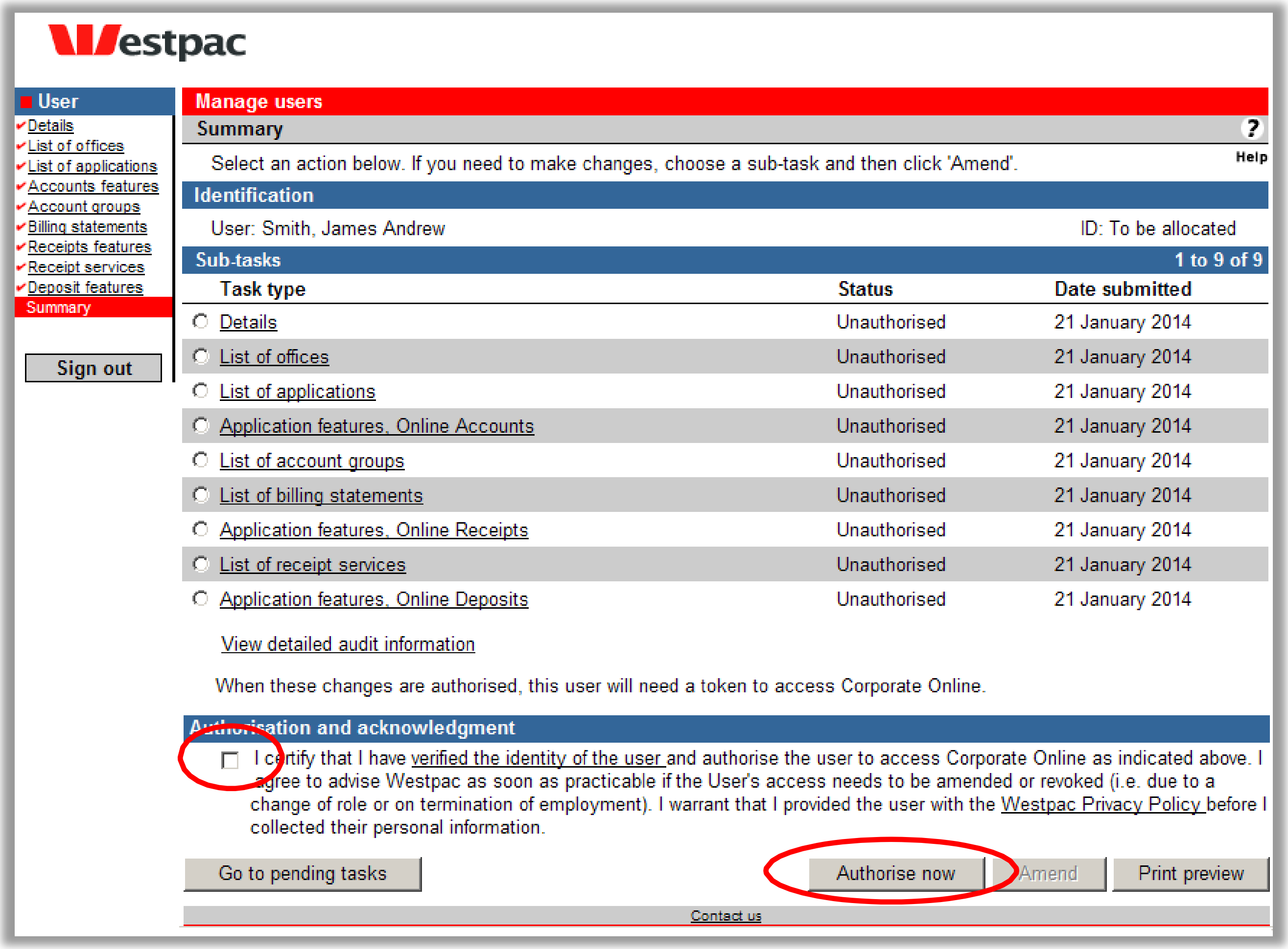
Step 10 – Select the **Receipt services** to be assigned to the new user and then click the **Continue** button.



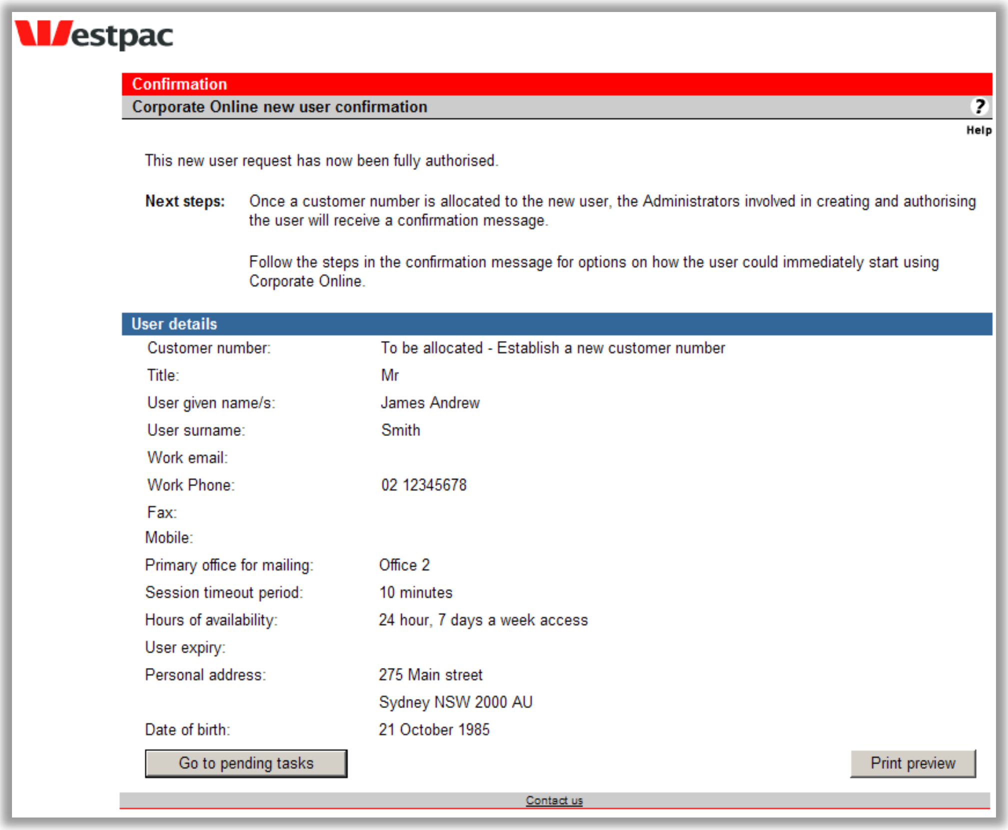
Step 11 – Select the **authority level** and **features** to be assigned to the user for **Online Deposits** then click the **Continue** button.



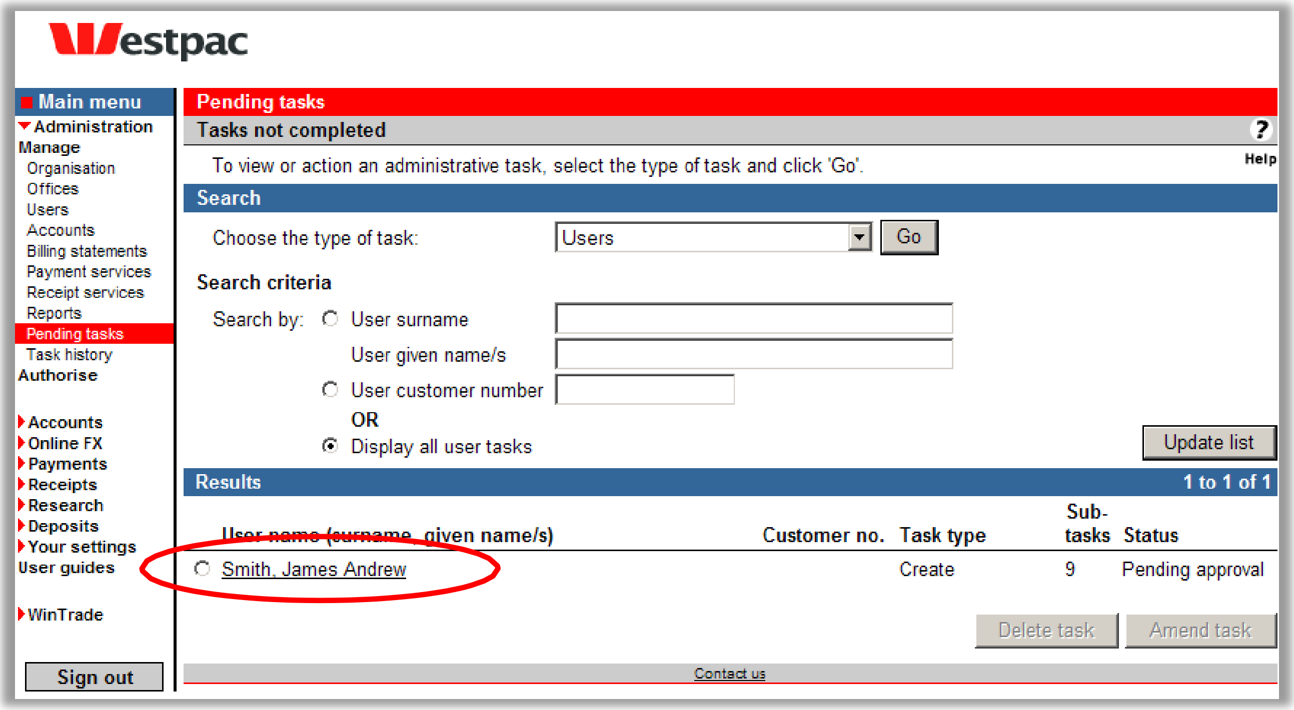
Step 12 – Review and confirm the new user's access. Click in the box to agree to the **Authorisation and acknowledgment** terms for creating a new user, then click the **Authorise now** button.



Step 13 – The **New user confirmation screen** is displayed. Click the **Go to Pending tasks** button.



The new user task is displayed with a status of "Pending Bank approval". Once the new user has been established by Westpac, the Administrators involved in creating and authorising the new user will receive a confirmation message.



<u>For any issues or enquiries, please call the Help Desk on 1300 134 291 (option 1, option 4) between the hours of 8:00 a.m. and 8:00 p.m (AEST).</u>