Adding new users to Internet Banking for Business

This guide will help you add new users to an existing Internet Banking for Business site.

Any user with Manage Site Administration permission can add a new user.

Before you start, you'll need the new user's:

- first and last name
- email address
- mobile phone number

You'll also require identification details for all users with role type Manage Site Administration/Authorise Activity/ Foreign Exchange Dealing, if they aren't known to BNZ as existing customers or account owners.
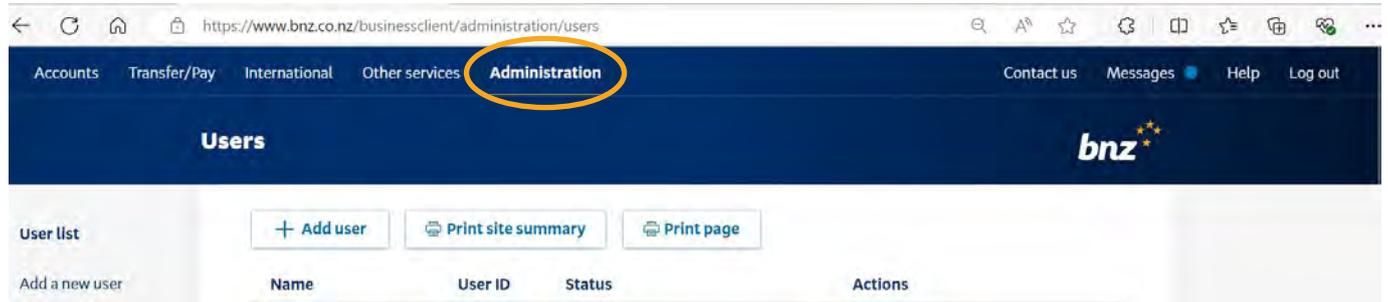
If you need help, you can call us Mon-Fri, 8:30am-5:30pm **0800 269 4242** or **+64 4 931 8234** if you're outside New Zealand (international toll charges apply).
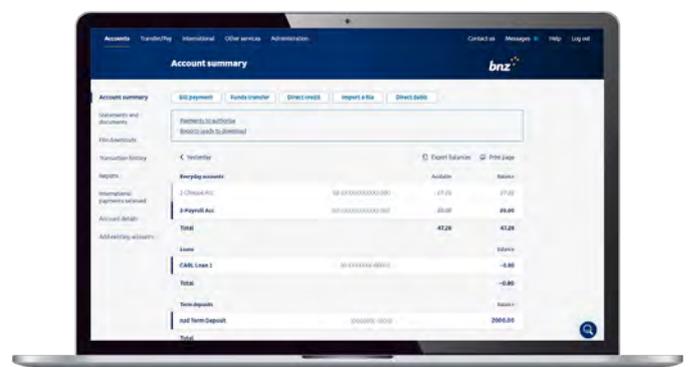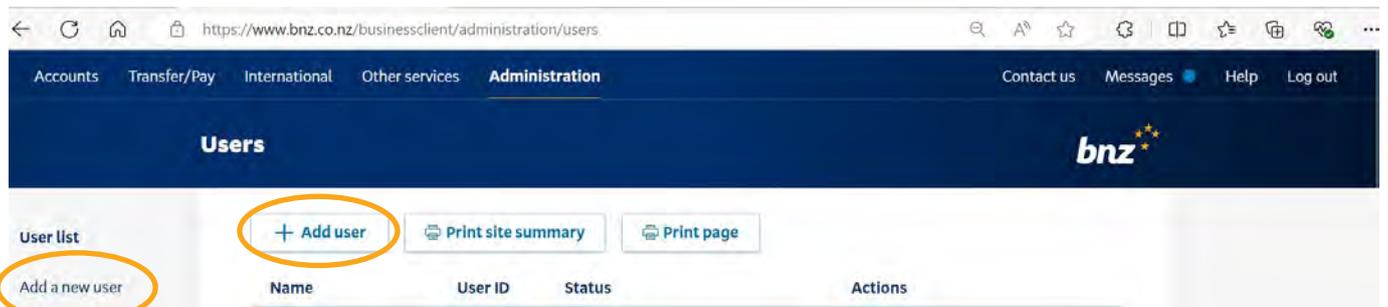
Step 1.

Log into Internet Banking for Business

Click on **Administration**.

Step 2.

Click on **Add a new user** or **+ Add user**

Step 3.

Enter the **User Details**

This includes the new user's:

- **first and last name**
- **user ID** – required when logging into Internet Banking for Business
- **mobile phone number** – we'll send a verification code to this number to complete the user setup
- **email address** – We'll send login details for the new user to this email address.

Step 4.

Select **User Permissions**

Option 1:
You can **copy permissions** from another user. This option is helpful if you have users in the same department who require the same permissions.

Option 2:
You can add a user by selecting from one or more of the underlined <u>templated roles</u>.

If you select Option 2, you can also select the accounts the new user will have access to. You can give them access to **All Accounts** or choose from **Selected Accounts**.

Click **Next**.

User Permissions

Copy permissions from :   ------ Create a new user ------   ⌄

User's permissions :   Based on creating a new user

- ☑ Manage Site Administration
  FULL - 15 of 15 actions selected
- ☐ Authorise Activity
- ☐ Manage Account Info and Services
- ☐ Maintain Payees
- ☐ Maintain Accounts Payable
- ☐ Maintain Accounts Receivable
- ☐ Audit Log ⓘ
- ☐ Only View Activity
- ☐ Foreign Exchange Dealing
  Select Customise Permissions to update

Select accounts that the new permissions will apply to. Note: Audit Log will apply to all accounts, regardless of what's selected below.

Account Access :   ⦿ All Accounts
                   ◯ Selected Accounts

[Cancel]   [Customise Permissions]   [**Next**]

Step 5.

User Identification

BNZ is required by law to formally identify all users within Internet Banking for Business who have an authorisation or administration capability.

Select if the new user is:

- **A current account owner or account signatory** – user must be a signatory on one or more of the accounts on Internet Banking for Business

- **A BNZ customer** – user must have an existing account with BNZ

  Select the new user's **Relationship to customer**. This can be employee, professional, agent, family, friend or other.

  Enter their account number or **ATM card number**. We will use this information to verify their signature on the user setup form with our records.

- **Non BNZ customer**

  Select the new user's **Relationship to customer**. This can be employee, professional, agent, family, friend or other.

  Enter their **date of birth** and **residential address**.

  Select a form of **Primary ID**. Some Primary ID may require a **Secondary ID**. Click here to find out more about Identification requirements.

Click **Next**.

Step 6.

Online Security

Confirm the new user's mobile number.

We'll send a verification code to this number to complete the new user setup. The user will also need to download the BNZ Business app to authenticate their log into Internet Banking for Business.

Click **Next**.

> **Tip**
>
> By downloading the BNZ Business app a user can do Internet Banking for Business using the BNZ Business app. You can switch the app to **Authentication only mode** which only allows the app to be used for login authentication purposes only.

Step 7.

Confirm user details

Check that all details are correct. You can use the **Back** button to make any changes.

Click **Submit**.

Step 8.

Acknowledgement details for new user

Click **Print Request documents** to open the **Request to activate a new user** form.

You can download this form, edit, and sign digitally, or print, sign, and scan, and return as a PDF to onlinerequests@bnz.co.nz

Include identification and proof of address documents and Person Acting on Behalf of forms for users who aren't known to BNZ as existing customers or account owners.

Click **Finish.**

Person Acting on Behalf requirements:

- If the Person Acting on Behalf form is generated as part of the new user setup it indicates that the user isn't an existing BNZ customer or an account owner. This form needs to be signed by the new users.

- To avoid processing delays, this form is best submitted along with the Request to activate new user form.

Identification of user role type Administrator/Authoriser/Foreign currency dealing, who are not BNZ customers:

- The individual(s) will need to identify themselves in a BNZ branch with photo ID and a proof of address – we'll verify the documents and take copies.

- **We will also set the new user up as a non-customer in our systems.**

- Alternatively, the individual(s) can get their ID documents certified by a trusted referee (e.g., Justice of Peace, a Notary Public, Chartered Accountant, Lawyer etc). Scan and email documents to BNZ at onlinerequests@bnz.co.nz.

For more help and support, visit Internet Banking for Business - Business Help and support at bnz.co.nz