

Commercial Card Self Service

About this guide

This guide shows you how to use the Commercial Card Self Service function to manage and track cardholder activity online, and also to lodge paperless Service Requests online.

Important information

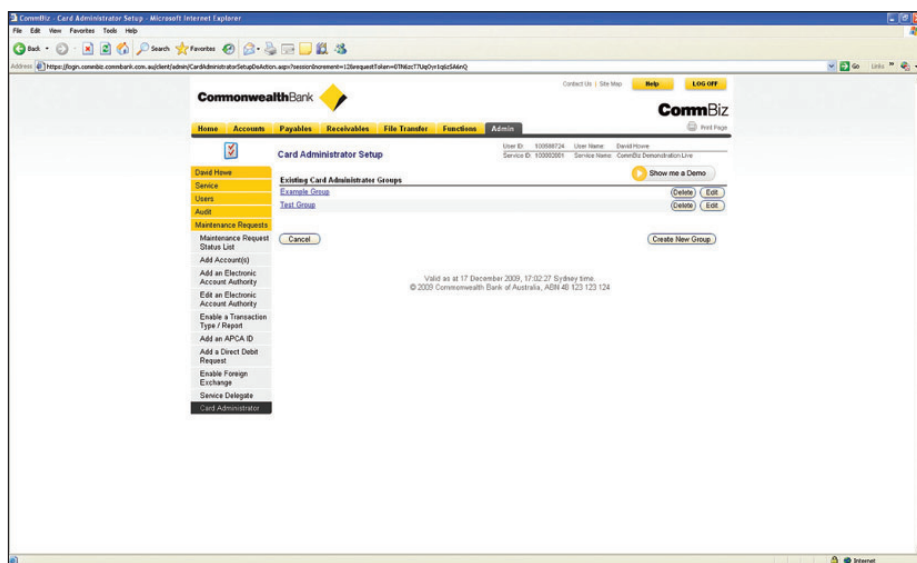
Before you process a Commercial Card Service Request, your CommBiz Administrator will need to set up Card Administration Groups. They can then add CommBiz Users to the Group as Card Administrators. A CommBiz Service Delegate will need to authorise the request. They do not need to complete any forms.

Card Administrators can then use CommBiz Service Requests to:

- Order a new card
- Change a card limit (monthly and per transaction)
- Cancel or reissue a card
- Order a new PIN
- Change cardholder contact details
- Change a cardholder address

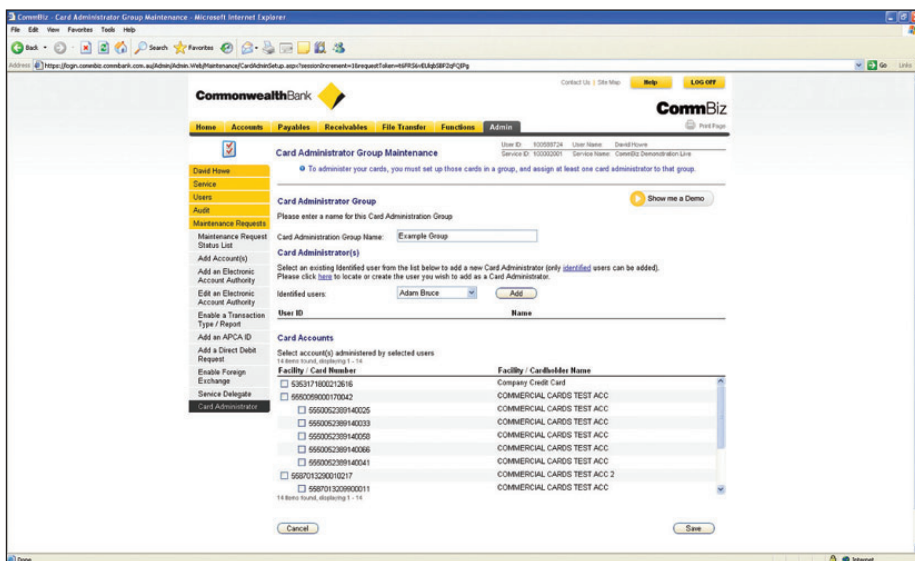
Setting up a Card Administrator group

1. Open your internet browser, visit **commbiz.com.au** and log in to CommBiz, using your token password. If you do not login using your Token, you will be prompted to do so when you go to Step 2.
2. On the top menu, click **Admin > Maintenance Requests**.
3. Select **Card Administrator** on the lefthand menu.

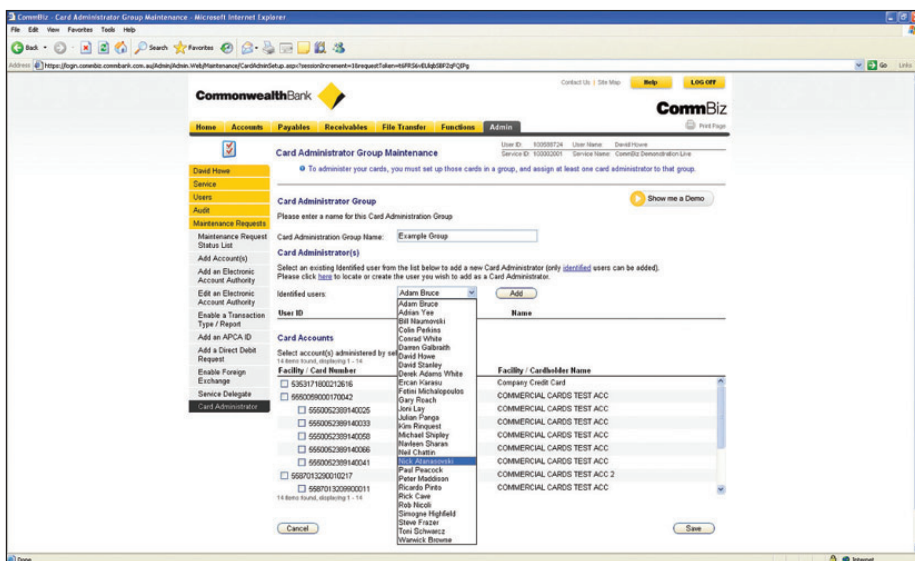


- If you have existing Card Administrator Groups already set up, the Card Administrator Setup Page will be displayed. You can edit or delete a group by selecting the **Edit** or **Delete** buttons. If you wish to add a group, select **Create a New Group**.

Note: The following screen shots and instructions show the process of setting up a new group. If you are editing an existing group, the process is similar, but the fields will be prepopulated with the current details.

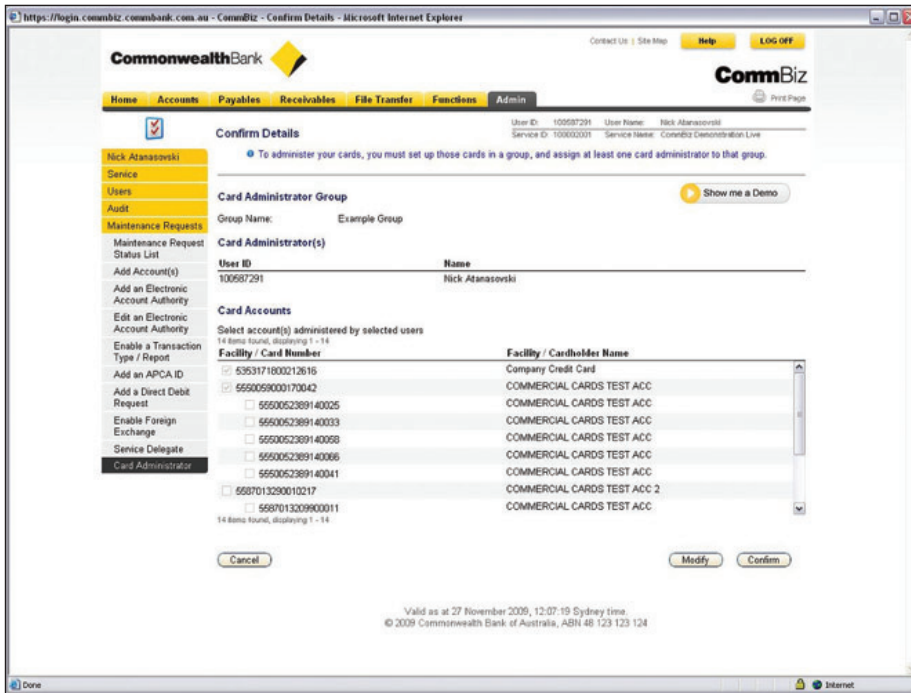


- Enter a name for the Card Administration Group.
- Select the Identified User from the drop down list that you would like to add to the Group and click **Add**. You can add additional Identified Users by repeating this step.

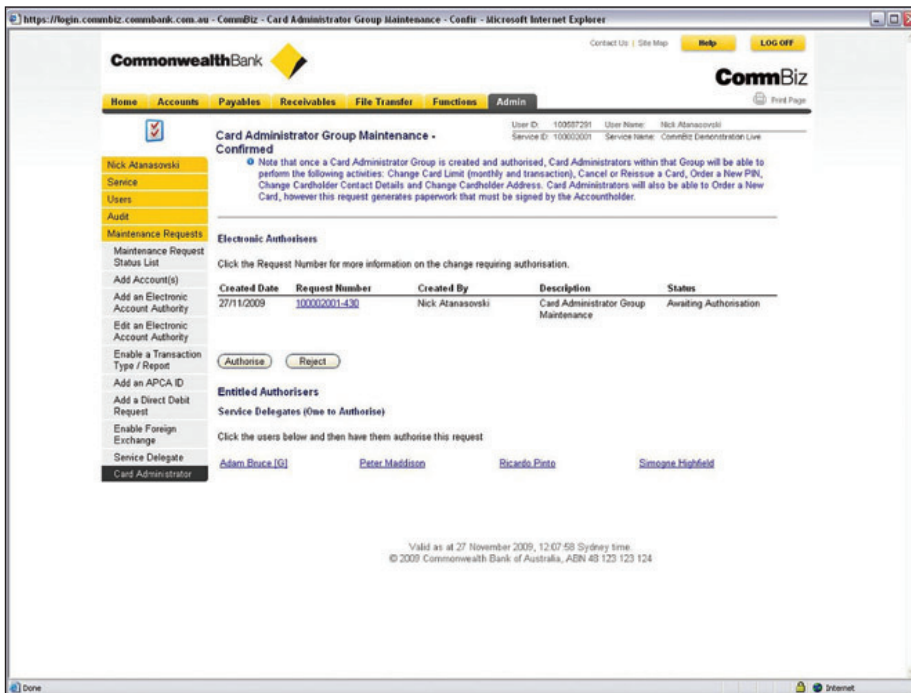


- Select the Accounts to be administered by the selected User(s). You can select one or more accounts at a facility level or a subset of cards within those facilities.
- Click **Save**.

9. You can Modify or Cancel the request. If the details are correct, click **Confirm**.

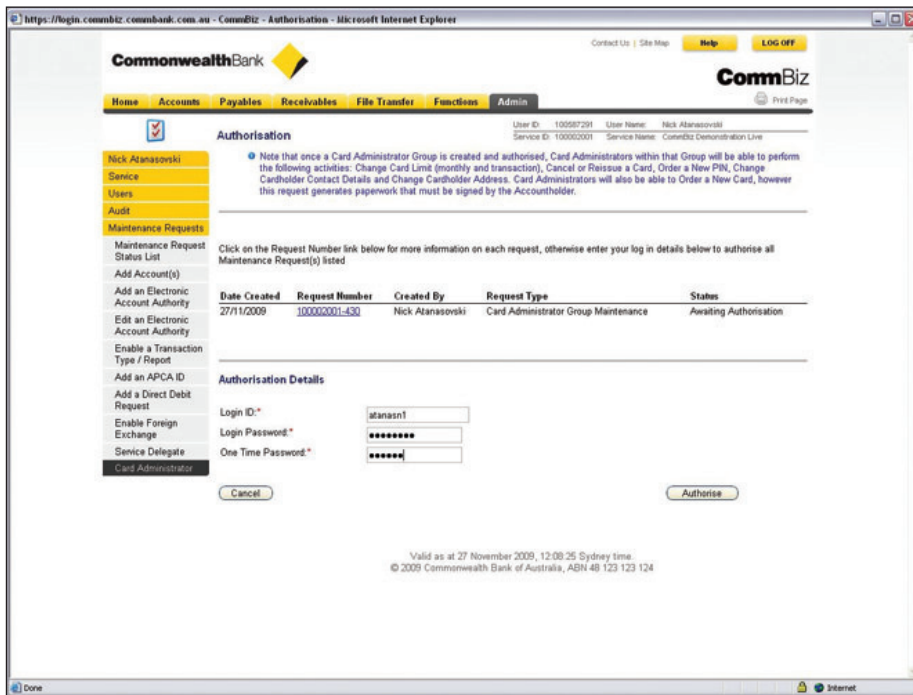


10. Your maintenance request has been submitted. If you are an Entitled Authoriser, **Authorise** and **Reject** buttons will be displayed. A list of Entitled Authorisers will also be displayed.



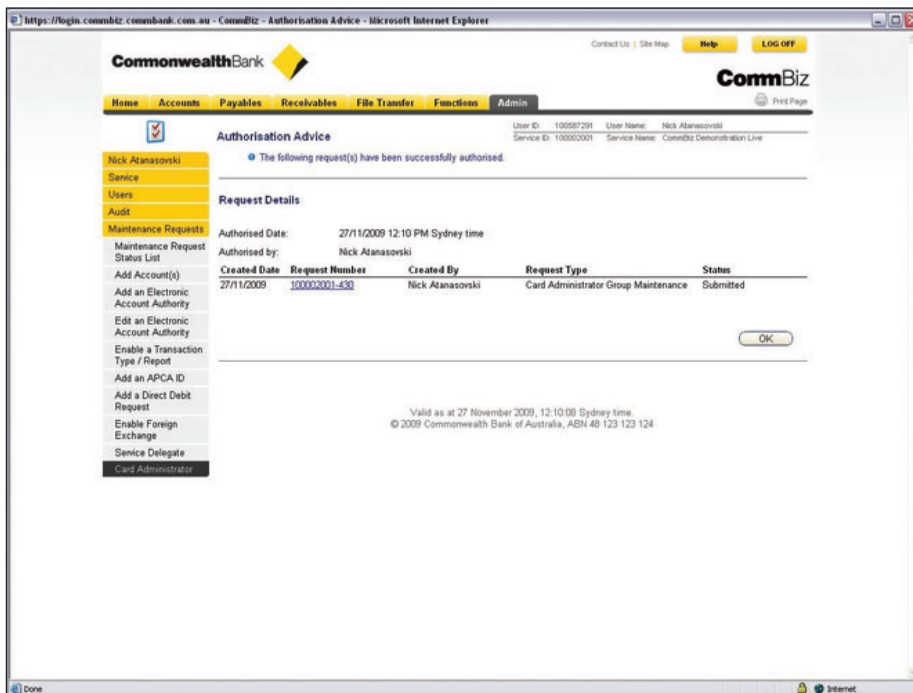
11. Click to **Authorise** the Maintenance Request.

12. Enter your **Login ID**, **Login Password** and **Token Password** from your CommBiz token.



13. Click **Authorise**.

14. Click **OK**.



15. Your Maintenance Request to set up a Card Administrator Group has been processed. Your Card Administrator can now complete Commercial Card Service Requests online.

1. On the top menu, click **Functions > Service Requests**.
2. Select **Order a New Commercial Card** from the lefthand menu to order a new commercial card for your existing Commercial card facility.

Note: The **Order New Commercial Card** option will only be available if you have the appropriate permission.

The screenshot displays the 'Service Request Status List' page in the CommBiz system. The page includes a navigation menu at the top with options like Home, Accounts, Payables, Receivables, File Transfer, Functions, and Admin. A search section is visible with the following fields:

- Request State: Open
- Request ID: (empty)
- Request Type: Select...
- Request Status: Select...

Below the search fields is a 'Results' section containing a table with the following data:

Created Date	Request ID	Created By	Request Type	Submitted Date	Status
27/11/2009	CR - 309503	Colin Perkins	Maintain Addressbook	-	Awaiting Verification
27/11/2009	CR - 309597	Colin Perkins	Maintain Template	-	Awaiting Verification
27/11/2009	CR - 309582	Colin Perkins	Maintain Addressbook	-	Awaiting Verification
27/11/2009	CR - 309482	Zeid Shleef	Maintain Template	-	Awaiting Verification
25/11/2009	CR - 309003	Daniella Leoni-Harris	Maintain Template	-	Awaiting Verification

At the bottom of the page, there is a footer with the text: 'Valid as at 27 November 2009, 14:00:41 Sydney time. © 2009 Commonwealth Bank of Australia, ABN 48 123 123 124'.

- If you are ordering a new Commercial Card, you need to complete all fields marked with an asterisk.

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Home Accounts Payables Receivables File Transfer Functions Alerts

Order a New Commercial Card

* = Required

Company Details

Accountholder Facility Number* [Select...]

Accountholder Company Name [Text Field]

Administrator Of This Card* [Select...]

Limits

Available Facility Limit: [Text Field] (includes all pending limit changes)

Monthly Card Limit* [Text Field] (perale dollar)

Individual Transaction Limit (\$) (perale dollar): [Text Field]

New Cardholder Details

Title* [Select...]

Full Given Name(s)* [Text Field]

Middle Name: [Text Field]

Family Name* [Text Field]

Other Names Known By: (if any) [Text Field]

Contact Number: (including area code) Work* [Text Field] Mobile: [Text Field]

Date of Birth: ** [Text Field] / [Text Field] / [Text Field] (dd/mm/yyyy)

Gender* Male Female

Driver's Licence Number: [Text Field]

Name To Appear On Card (Including title, e.g. Mr Lee Smith - Maximum 21 characters) [Text Field]

Address for Correspondence* [Text Field]

[Text Field]

Suburb: [Text Field]

Country: [Select: Australia] [Text Field]

State: [Select...] Post Code* [Text Field]

Residential Address* (PO Box not acceptable) [Text Field]

[Text Field]

Suburb: [Text Field]

Country: [Select: Australia] [Text Field]

State: [Select...] Post Code* [Text Field]

Card Control Options

Cash Access: Yes No

Hierarchy Reporting Level: [Text Field]

Blocking Code: [Select...]

Any Other Agreed Controls and Instructions: [Text Field]

Cardholder Identification

Cardholder Identification Details* Cardholder is a Commonwealth Bank accountholder Signed by Company's authorised verifying officer Verify Identification at any of the Commonwealth Bank's Branch

[Cancel] [Submit]

Valid as at 27 November 2009, 14:01:39 Sydney time.
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- Once you have entered all the details, click **Submit**.
- The confirmation screen will be displayed. If all details are correct, click **Confirm**.
- Print the form and have it signed by the Account owner then fax it to **1300 729 512**.

Maintaining existing Commercial Cards

1. Select **Maintain Existing Commercial Cards** from the lefthand menu.
2. Choose the Accountholder Facility Number that is to be maintained from the drop down list.

CommonwealthBank
CommBiz

Home Accounts Payables Receivables File Transfer Functions Admin

Maintain Existing Commercial Cards

Messages
Service Requests
Service Request Status List
Change Account Address
Reorder Cheque Book
Order a New Commercial Card
Maintain Existing Commercial Cards
Manage Statements
Stop Cheques

You can include a maximum of 50 cards.

Search

Accountholder Facility Number: Select...
Company Credit Card | 5353171800212616 | 40.00
COMMERCIAL CARDS YES... | 5550059000170042 | 40.00

Card Number:
Cardholder Name:

Search Clear

Card Number	Cardholder Name	Existing Monthly Limit(s)	New Monthly Limit(s)	New Transaction Limit(s)	Order New PIN	Re-issue Card	Edit Contact Details	Cancel Card
0 items found								

Cancel Submit

Valid as at 27 November 2009, 14:15:10 Sydney time.
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3. Click **Search**.
4. Cards attached to the facility are displayed.

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Home Accounts Payables Receivables File Transfer Functions Admin

Maintain Existing Commercial Cards

Messages
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Maintain Existing Commercial Cards
Manage Statements
Stop Cheques

You can include a maximum of 50 cards.

Search

Accountholder Facility Number: Company Credit Card | 5353171800212616 | 40.00

Card Number:
Cardholder Name:

Search Clear

Card Number	Cardholder Name	Existing Monthly Limit(s)	New Monthly Limit(s)	New Transaction Limit(s)	Order New PIN	Re-issue Card	Edit Contact Details	Cancel Card
5353171800212616	Company Credit Card	0			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

1 item found, displaying 1 - 1

Cancel Submit

- You can set a New Monthly Limit, a New Transaction Limit, Order a New PIN, Re-issue a Card, Edit Contact Details and Cancel a Card. Complete the appropriate fields related to your request.

1 item found, displaying 1 - 1

Card Number	Cardholder Name	Existing Monthly Limit(s)	New Monthly Limit(s)	New Transaction Limit(s)	Order New PIN	Re-issue Card	Edit Contact Details	Cancel Card
5353171800212616	Company Credit Card	0	1000		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

1 item found, displaying 1 - 1

- Once you have chosen your action/s, click **Submit**.

- Click **Confirm**.

1 item found, displaying 1 - 1

Card Number: 5353171800212616
 Cardholder Name: Company Credit Card
 Order New Pin: Y
 Change Contact Details: Y
 Address: 1 Example St Sydney NSW - 2000 Australia

1 item found, displaying 1 - 1

Valid as at 27 November 2009, 14:25:24 Sydney time.
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- Click **OK** to complete the request. You can view the status of your request from the Service Request Status List menu under the Functions tab.

