Managing your Capital Growth Account

About this Guide

This guide takes you through a range of functions available in CommBiz to manage your Capital Growth Account. These include:

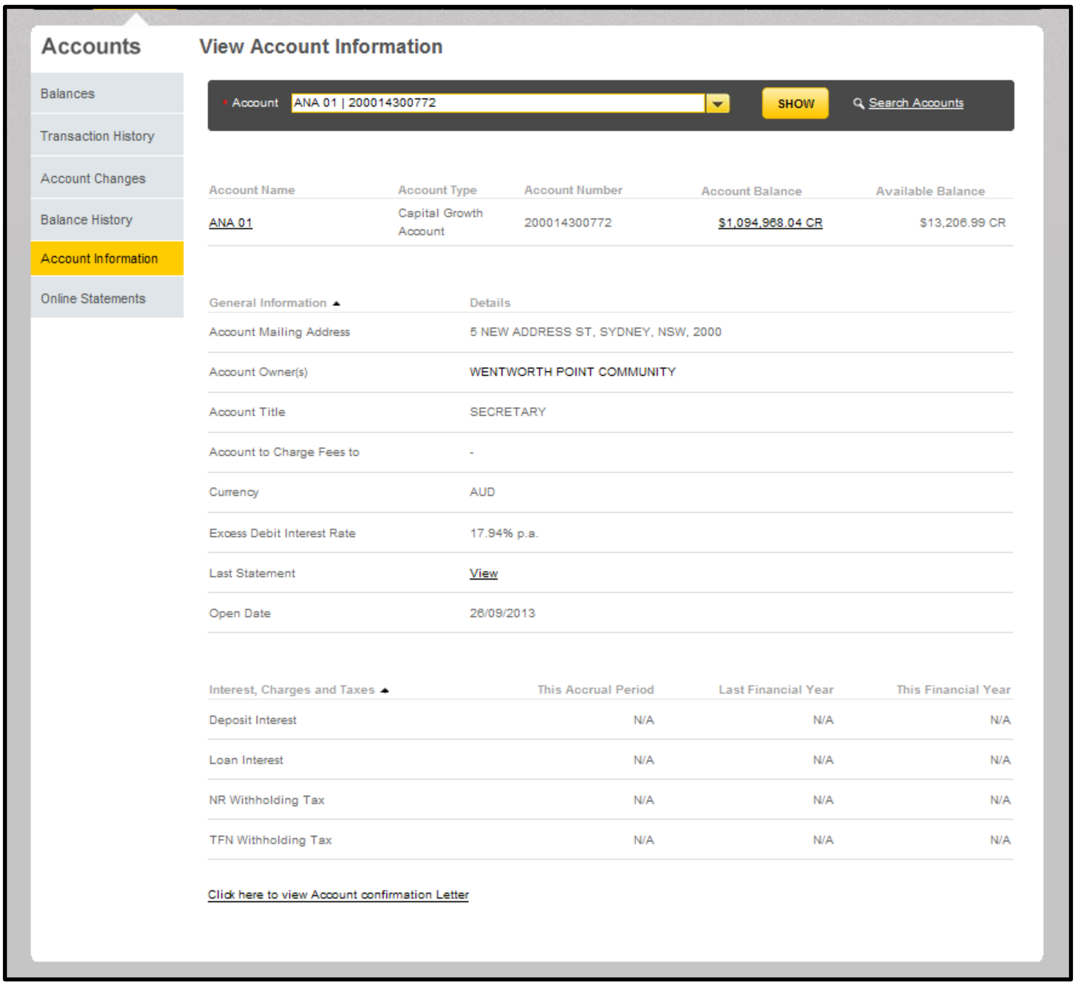
I. Viewing Account Information
II. Viewing and Exporting Transaction History
III. Viewing Notice History
IV. Viewing and Exporting Non-Financial Transactions
V. Authorising Notices

Before you start

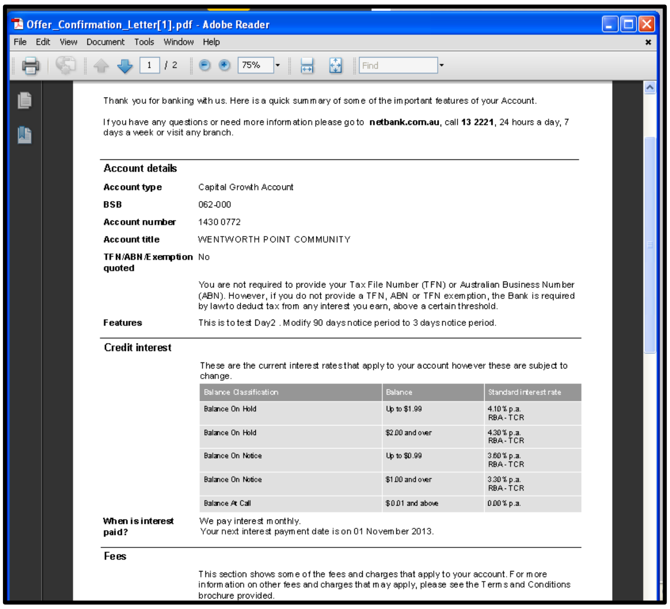
You must have access to view and create on this account, including Service Request entitlement held under Admin. You must also be on the Electronic Account Authority of the account in order to authorise the notice.

I. Viewing Account Information

1. Open your internet browser, visit **www.commbiz.com.au** and log in to CommBiz.
2. On the top menu navigate to **Accounts > Account Information**
3. Search for the Capital Growth Account using simple predictive text, by typing any part of the account name and/or account number in the 'Account' field and the predictive search will display the accounts that match the same sequence



4. You can also view the ‘Account Confirmation Letter’ by clicking in the hyperlink available at the bottom on the **View Account Information** screen



The Account Confirmation Letter provides an outline of the account fees and charges, including credit interest rates.

II. Viewing and Exporting Transaction History

1. Open your internet browser, visit **www.commbiz.com.au** and log in to CommBiz.

2. On the top menu navigate to **Accounts > Transaction History**

3. The **View Transaction History Page** is displayed

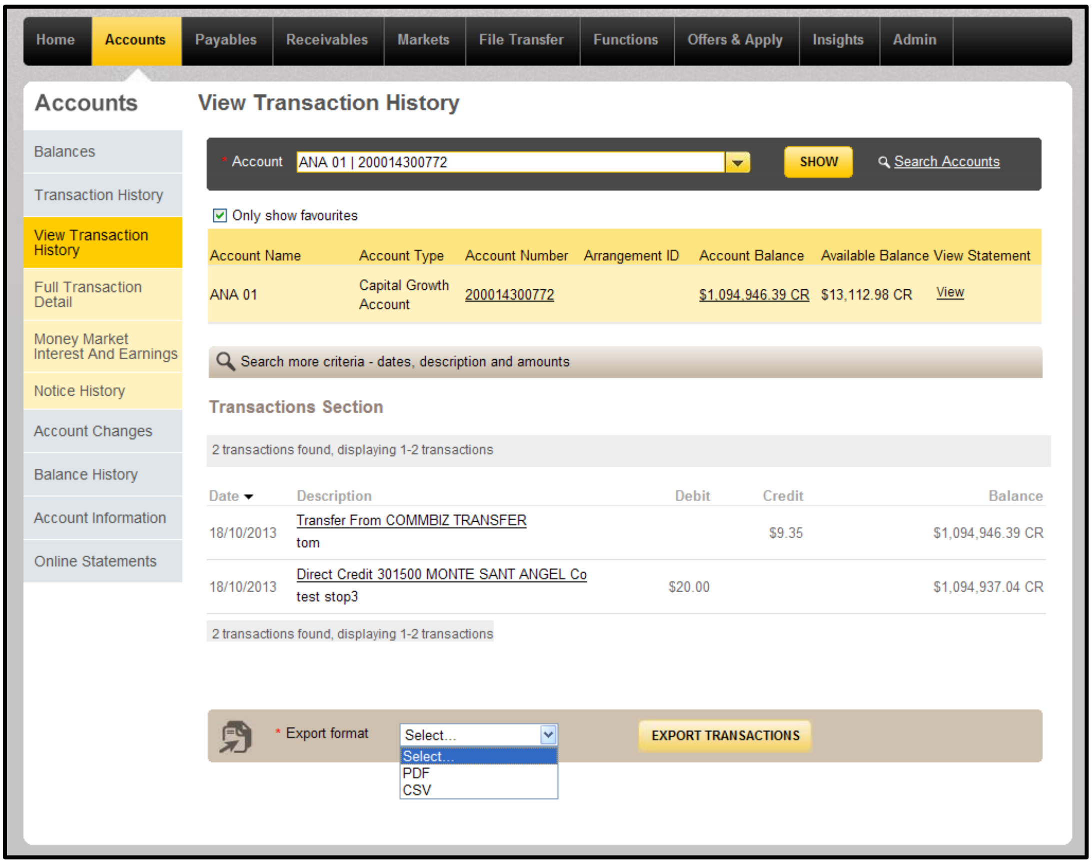
4. From the ‘Account’ field, select the account for which you wish to view the transaction history.

   Note: Clicking on ‘show favourites’ will display your favourite accounts only, as set on your profile.

5. Using the search criteria, choose the date range for which you wish to view the transactions then click the **Show** button.

   Note: The default search of **All** will retrieve 15 months worth of transaction data, unless the account has been opened within 15 months.

6. The list of located transactions is displayed



7. Transaction History can be exported in PDF or CSV formats

III. Viewing Notice History

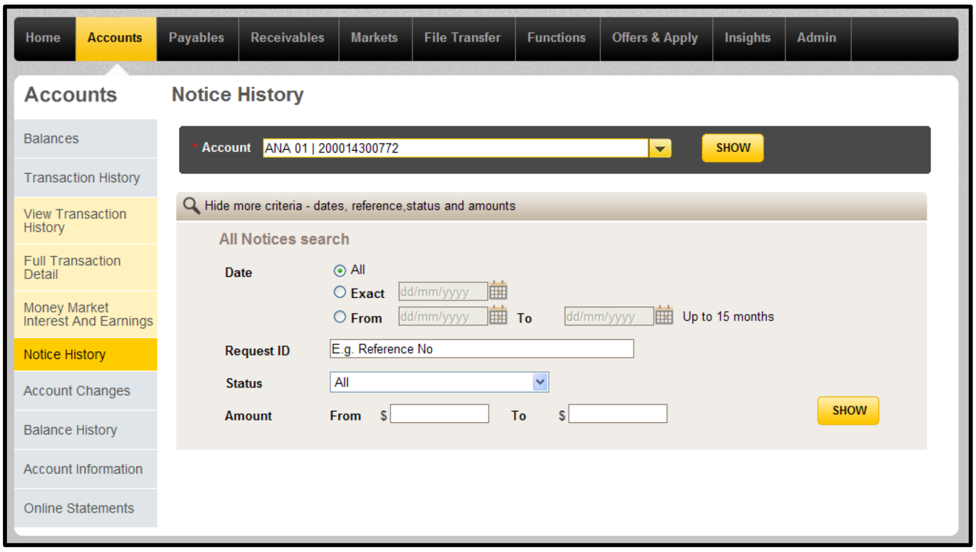
1. Open your internet browser, visit **www.commbiz.com.au** and log in to CommBiz.

2. On the top menu navigate to **Accounts > Transaction History,** then select **Notice History.**

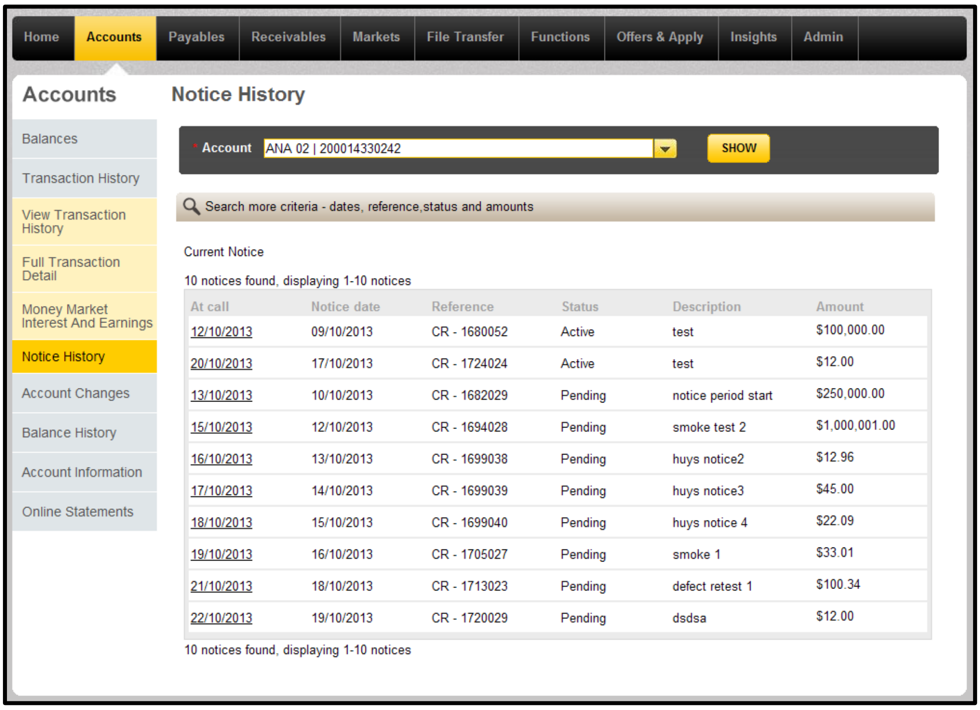
3. From the ‘Account’ field, select the account for which you wish to view the notice history.

4. Using the search criteria, choose the date range for which you wish to view the notices then click the **Show** button.

   Note: The default search of **All** will retrieve 15 months worth of notice history, unless the account has been opened within 15 months.



5. The list of located historical notices is displayed.



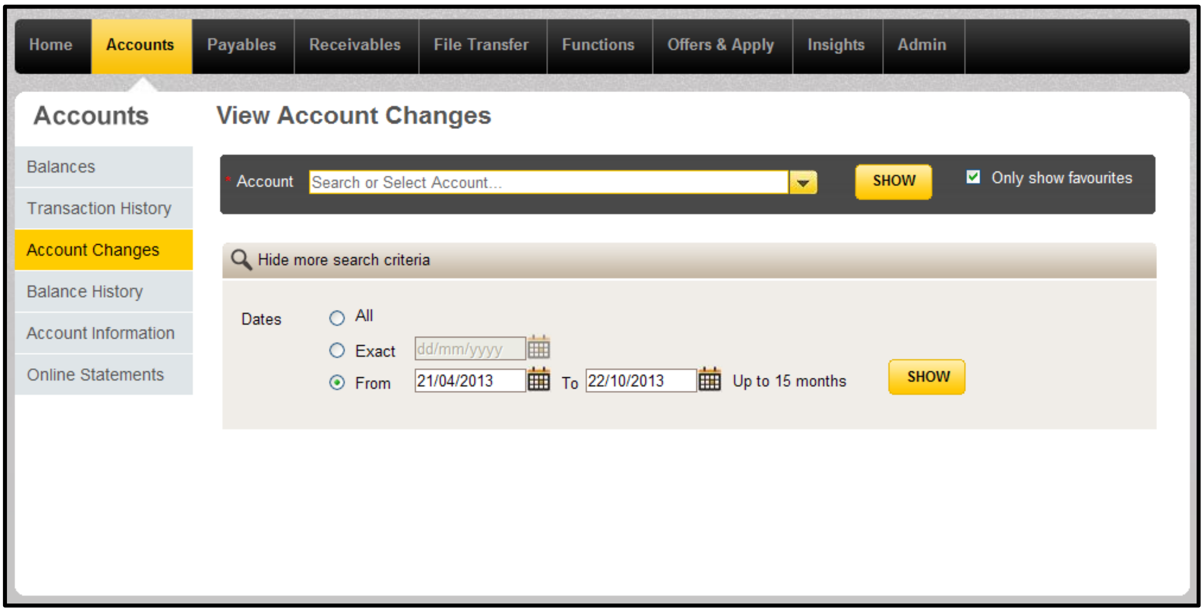
IV. Viewing and Exporting Non-Financial Transactions

1. Open your internet browser, visit **www.commbiz.com.au** and log in to CommBiz.

2. On the top menu navigate to **Accounts > Account Changes.**

3. From the 'Account' field, select the account for which you wish to view the non-financial transactions (changes).

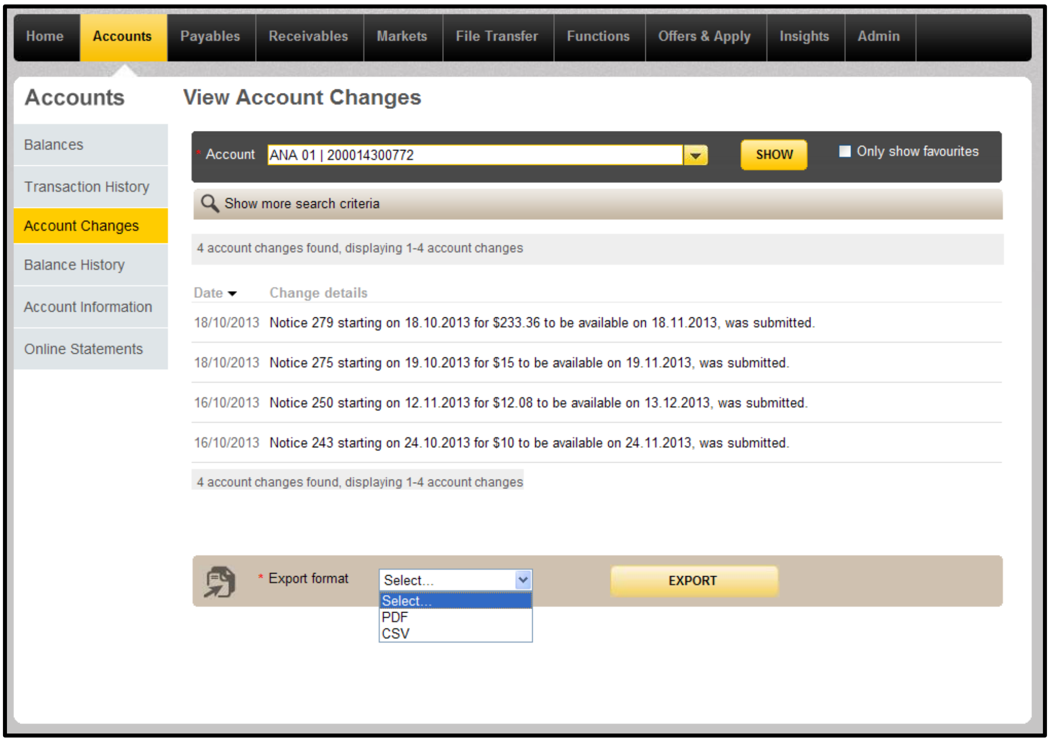
   Note: Clicking on 'show favourites' will display your favourite accounts only, as set on your profile.



4. Using the search criteria, choose the date range for which you wish to view the transactions then click the **Show** button.

   Note: The default search of **All** will retrieve 15 months worth of transaction data, unless the account has been opened within 15 months.

5. The list of located non-financial transactions is displayed.

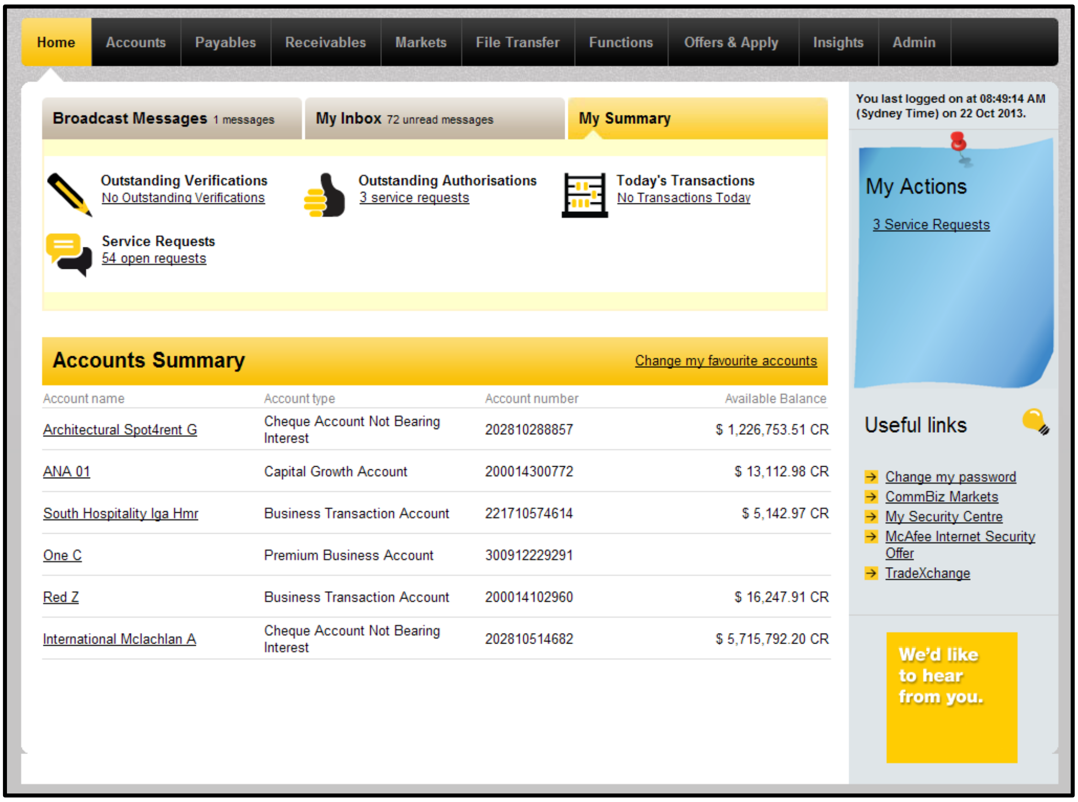


6. Transaction History can be exported in PDF or CSV formats

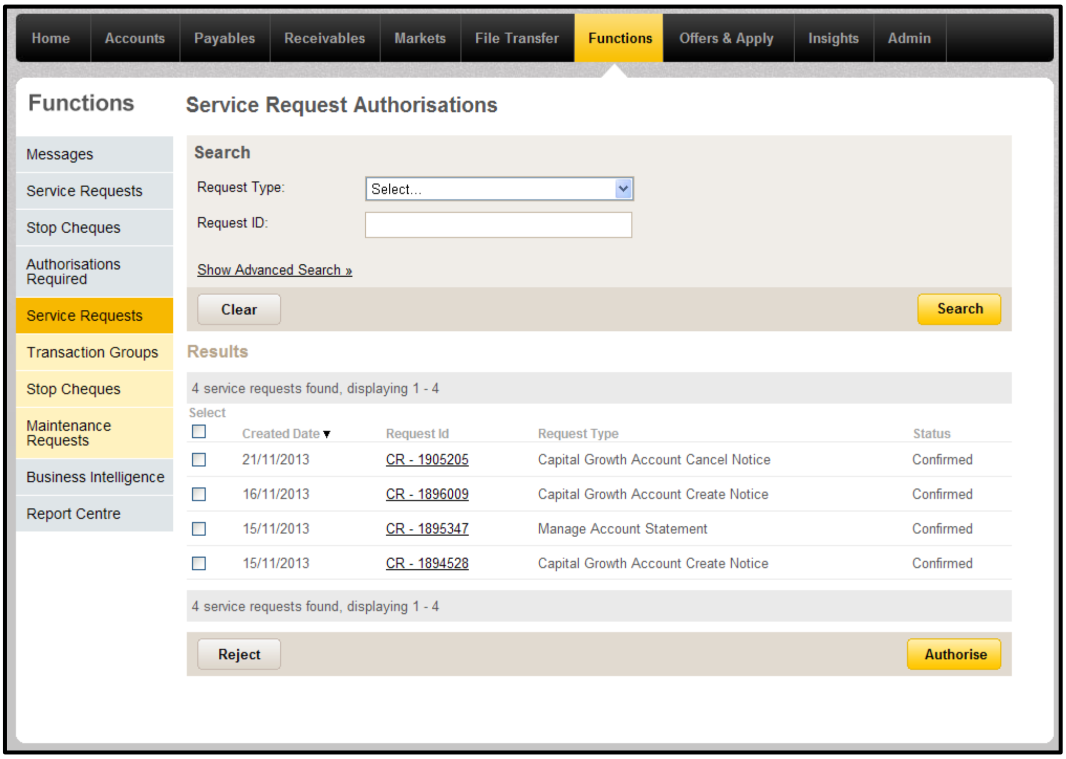
V. Authorising Notices

1. Open your internet browser, visit **www.commbiz.com.au** and log in to CommBiz.

2. On the **Home** page, the 'My Actions' blue sticky note will be updated to reflect any Service Requests that require authorisation. This will include any Notices for the Capital Growth Account.



3. Click on the **Service Request** hyperlink. This will direct you to **Service Request Authorisations**.



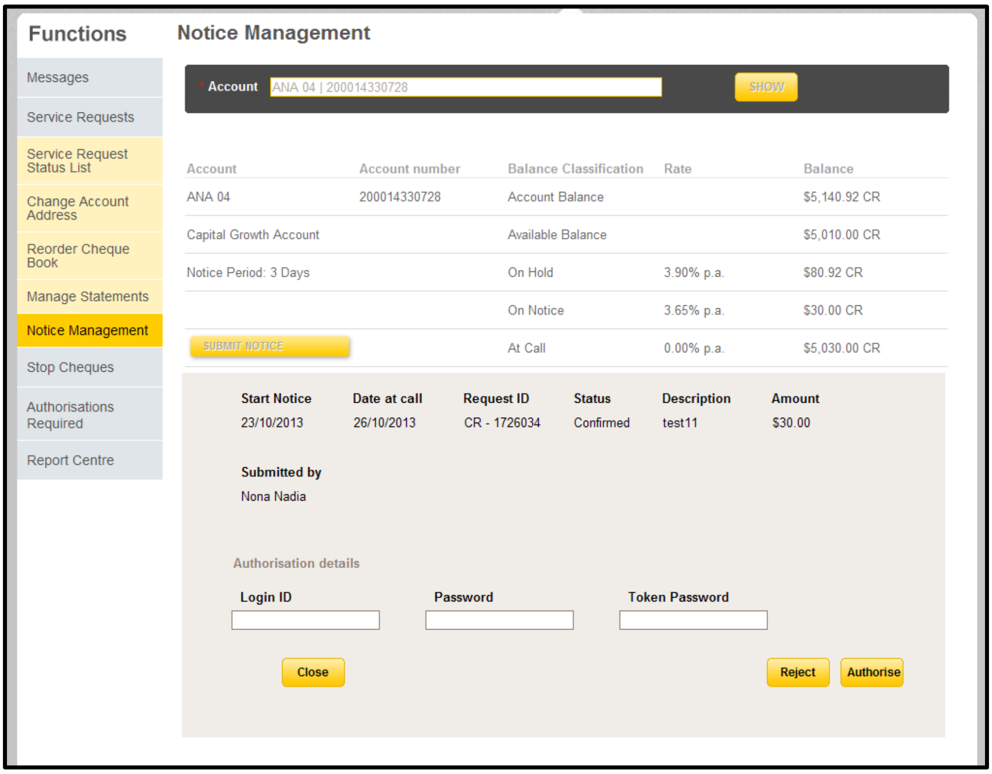
4. The search will display all service requests requiring authorisation. You will be able to authorise

   - Capital Growth Account Create Notice
   - Capital Growth Account Cancel Notice
   - Change of Address
   - Managing Account Statements

   Select the tick box for ‘Capital Growth Account Create Notice’ or ‘Capital Growth Account Cancel Notice’ and select **Authorise.**

   Note: You can only authorise one request at a time.

5. You will be directed to **Notice Management**, where the details of the specific request will be provided.



6. Enter your credentials and select **Authorise** to progress to the next stage.

7. The authorisation process is governed by the electronic method of operation on the account. If more than one Authoriser is required, the request will go to a Partially Authorised status until all required Authorisers have authorised the request.

8. Please refer to the table below for a description of the statuses on the **Capital Growth Account Create Notice** request.

Status	Description	Next Stage
Pending	The start date of the notice is in the future. When the start date arrives, the status of the notice will change to Active and the funds will automatically move from 'Balance On Hold' to 'Balance On Notice' classification.	Active
Active	The notice is currently active and the funds are reflected in the 'Balance On Notice' classification The request will move to a completed status when the notice period has been served. The funds will then automatically move to the 'Balance At Call' classification.	Completed
Completed	The notice has been completed after serving the notice period. The funds are reflected in the 'Balance At Call' classification.	-
Cancelled	The notice has been cancelled before completion. The funds have been returned back to the 'Balance On Notice' classification.	-