



How to...

Authorise transactions for multiple signatories.

SBS Internet banking guides.



Step 1. ► Setting up payments for accounts that require one or more signatures to make a payment.

If you have an account that requires more than one signature, a payment will need to be authorised by another person.

The first person will log into internet banking and set up the payment, (if you don't know how to do this follow the '[How to make a payment](#)' guide).

authentication

1 account details 2 confirmation 3 authentication 4 receipt

authentication type payment
authentication reference 4qdfxy2np

authenticate using sms authentication method. this will send a 6 digit code to your mobile phone which you'll need to enter into the box below to complete your transaction.

if you have not received your sms authentication code within five minutes, please call us on 0800 727 2265 to speak with a member of our contact centre team.

SEND CODE TO MOBILE NUMBER

sms authentication code *

SUBMIT RETURN

The person setting up the payment may be asked for authentication.

► A 6-digit **sms authentication code** will be sent to their registered mobile number. Once they **SUBMIT** the authentication code, they will receive a message asking for additional approval.

You will be asked for an authentication code if;

- You haven't personally set up or approved a payee before.
- A change has been made to a payment.

Additional approval will be required from another person (signatory).

additional approval required

authorisations	1 of 2
authorised users	fred, ginger

additional comment

"send authorisation request" to send an authorisation request to the authorised users;

SEND AUTHORISATION REQUEST **CHANGE** **RETURN**

Enter any **additional comments** and select **SEND AUTHORISATION REQUEST**.

Sending authorisation means that when the next person logs in they will be advised that a payment is waiting for their authorisation (shown below).

 The transaction has been successfully completed

authorisation notifications sent

notifications have been sent requesting authorisation.

receipt number	3xt6rw5n2d6djzxq
authorisations required	1
authorised users	fred, ginger

your transaction has been sent for appropriate authorisation.
click "done" to return to the transactions page.

DONE

Step 2. ▶ Another person logs in.

your messages

 you have 1 transaction that is pending authorisation for [123456 - mod pod].

these messages can be reviewed during this logon session from the other services tab. they will be deleted once you log off.

click "ok" to continue to your accounts.

OK

▶ When the **your messages** screen appears to inform you of a pending authorisation, click **OK**. This will take you back to the **home** screen.

home accounts ▾ move money ▾ multi-payments ▾ estatements ▾ secure message ▾

view our other products ▾

account manager

search 

Mrs Sample Name
123456



MOD POD
789101



There will be a number with a red circle on the payment icon. Click directly on the red circle, (it doesn't matter which entity you are on), and it will take you to the authorisation page.

▶ Alternatively you can click on the **move money** tab and select **authorisations** from the drop-down menu.

On the authorisations screen you will see which payment needs to be authorised.

authorisations

transaction type

All

account	creation date	due date	amount	status	action
sample - 03-1234-0123456-00	15/01/2021	19/01/2021	\$69.99	needs auth	view authorise

Click on the three orange dots to select **view** or **authorise** from the drop-down menu.

payee nickname vicki-modpod

payment details

amount \$60.99

particulars mod pod

code reimburse

reference sample

details - my statement vicki-samples gift

payment date 13/01/2021

payment frequency once only

reason for declining transaction

press "authorise" to accept the payment. press "decline" to reject the payment, you must provide a comment for the rejection. press "cancel" to return to the previous screen.

AUTHORISE **DECLINE** **CANCEL**

Click **AUTHORISE** to complete the transaction or **DECLINE** to reject the transaction.

If you have authorised the payment you will get a payment receipt.

 The transaction has been successfully completed

payment receipt

receipt number	03-1234-0123456-00
authorisation reference	2xk3vb4m5k6uytre
authorised by	sample, vicki
transaction type	payment

from account

transfer from account	03-1234-0123456-00
account name	samples social club
account product	transactional account
account type	current

If there are more payments to authorise they will appear in the authorisations screen.

authorisations

transaction type

All

 you have 1 transaction that is pending authorisation for [123456 - sample].

Click on the menu to select the pending authorisation.

pending payments

transaction type

All

	account	payee	due date	payment reference	frequency	amount	action
	03-1234-0123456-00	vicki sample - 03-1234-0123456-00	19/02/2021	mod pod reimburse sample	once only	\$69.99	

Payments will go out immediately and can be viewed in transaction history or if it has been set for a future date you can view in **pending payments**.

Check out our full range of 'How to' guides:

[Log in and set up your password](#)

[View accounts, balances and transaction history](#)

[Add a new payee](#)

[Make a payment](#)

[Set up multi-payments](#)

[View and download statements](#)

[Authorise transactions for multiple signatories](#)

You can also follow our 'How to' online videos by visiting our website sbsbank.co.nz/how-to-guides

If you prefer to chat with our friendly team you can give us a call on **0800 727 2265** and we can talk you through it step-by-step.

