



MACQUARIE
BANK

How to switch to online statements

Active Banking

This guide will help you switch to online statements instead of mailed paper statements for an account or facility.

Log in to Active Banking

All you need to log in to Active Banking is your Macquarie Access Code (also referred to as a MAC) and your online password. If you don't have your Macquarie Access Code or have forgotten your password, please contact our client support team on 1800 620 673 for assistance.

1 Select **Open & Manage Accounts**.

The screenshot shows the Macquarie Active Banking interface. At the top, there's a navigation bar with 'Forms', 'Help', 'Contact us', and 'Logout'. Below that, the 'Active Banking' header is visible, along with a 'Welcome DEMONSTRATION USER' message and a link to '> myhome > My Details and Preferences'. The main navigation menu includes 'Account Summary', 'Accounts & Statements', 'Open & Manage Accounts' (highlighted with an orange circle), 'Transfers & Payments', 'Pending Authorisation', 'Downloads', and 'DEFT References'. Under 'Open & Manage Accounts', there are sub-options: 'Manage Accounts', 'Open Account', 'Term Deposits', 'Cheque Stops', 'Pending Authorisation', and 'History'. The 'Select Account' section is active, showing a search bar and a table of accounts. The table has columns for 'Account', 'Account name', 'Account type', 'Available funds', 'Current balance', and 'Choose an action'. The 'Choose an action' column for the selected account (111111111 STRATA SP 1) has a dropdown menu with options: 'Close account', 'Switch to online statements' (highlighted with an orange circle), and 'Provide TFN, ABN or exemption'.

Account	Account name	Account type	Available funds	Current balance	Choose an action
000000000	SAMPLE REAL ESTATE - GENERAL	Investment	\$102,396.96	\$102,396.96 CR	Close account
111111111	STRATA SP 1	Cheque	\$197,782.91	\$197,782.91 CR	Switch to online statements
000000000	MKTING- (QLD) TABLELANDS	Cheque	\$2,381.58	\$2,381.58 CR	Provide TFN, ABN or exemption

2 Choose the account you want changed to online instead of paper statements, then click **Switch to online statements**.



TIP:

If you want to switch to online statements for all accounts within a facility, simply choose one of the accounts under that facility.

NOTE:

Switching to online statements will replace all paper statements currently being sent for the selected account or accounts. If you have statements being sent to multiple addresses, all of these will be replaced with online statements. If an existing recipient of a paper statement still requires access to this information, please contact us and we will arrange to have a paper statement sent to them.

3 Choose whether you want to switch to online statements only for the account selected, or for all accounts associated with the facility of the account you selected.

* **TIP:**
If you choose to switch to online statements for an account linked to a multi-facility, you can only choose to switch to online statements for all accounts within that facility, and not for individual accounts.

4 Choose your preferred sort order for online statements then click **Next**.

Switch to Online Statements

Online statements preference
Please select which account(s) you would like to receive online statements:

For account 000000000 - INVEST
 For all accounts associated with facility 111111 - INVEST

Online statements sort order
Where there are multiple account statements contained within one statement file, you can choose to have the statements sorted in a number of ways.

Please select your preferred sort order for online statements:

By account name
 By account number
 By strata plan number

Back Next

* **TIP:**
The sort order selected is important as this determines the order of individual account statements within the statement file. A single statement file will be delivered to Active Banking, but the individual account statements within the file will be in the order you select here. There are three different sort orders to choose from:

- by account name – the account statements within the statement file will be sorted by the name of the account
- by account number – the account statements within the statement file will be sorted by the account number
- by strata plan number – the account statements within the statement file will be sorted by the strata plan number

5 The **Preview Switch to Online Statements Request** page will display. Check the details are correct, if you need to modify the request click **Back**, or click **Submit**.

Preview Switch to Online Statements Request

i Please review the details of your request before clicking Submit. By switching to online statements, all statements associated with the facility or account will be provided online, through Active Banking. Once the request has been submitted it cannot be modified or cancelled. [00592]

Online statements preference	
Switch to online statements	For all accounts associated with facility 111111 - Invest
Online statements sort order	
Sort order preference	By account name

Back Submit

6 The **Switch to Online Statements Request Submitted** page will display.

Switch to Online Statements Request Submitted

i Your request to Switch to Online Statements has been submitted. [00593]

Online statements preference	
Switch to online statements	For all accounts associated with facility 111111 - Invest
Online statements sort order	
Sort order preference	By account name
Request information	
Request created	30 Mar 15
Request ID	00000000
Status	Submitted

Print

* **NEED HELP?**

2:39 PM EST, Monday 23 October, 2017 Forms **Help** Contact us Logout

Active Banking
Welcome **Demonstration User** > myhome > My Details and Preferences

Account Summary	Accounts & Statements	Open & Manage Accounts	Transfers & Payments	Pending Authorisation	Downloads
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