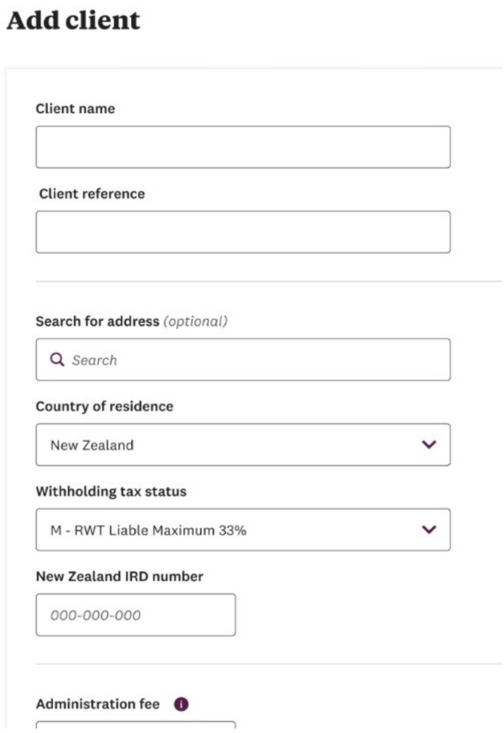
How to create a new client

How to add a new Multi Deposit Scheme client.

You will need to create a client before you can create a new On Call DSN and transfer.



1. Go to ‘Account’ and select ‘Multi Deposit Scheme’
2. Go to ‘Clients’ tab and click ‘Add client’
3. Enter the client’s details, the preferred fee type and rate.

Note that any fields marked with ‘optional’ are not mandatory, and the rest of fields are required.

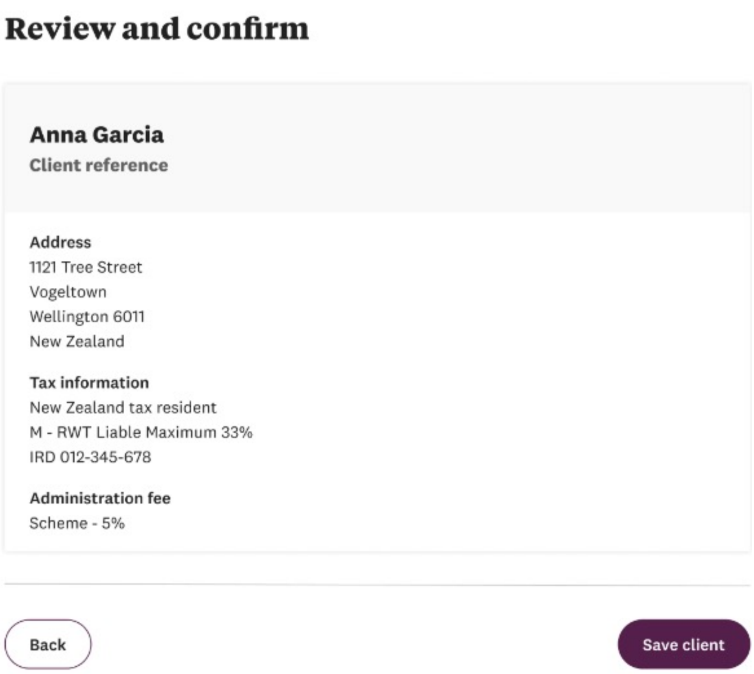
The only tax type that does not require an IRD number is ‘N – RWT Non-Declared’.

New Zealand IRD number will be optional when you choose other countries.

Exempt tax needs to choose exemption type.

Note: Client tax details on Westpac One Business do not currently replace the existing MDS Foreign Tax process.

Read more about Foreign Tax here: **westpac.co.nz/about-us/legal-information-privacy/foreign-tax-residency/**



The ‘Administration fee’ is a fee you can choose to charge your client (not a fee Westpac will charge you) – you can click on ‘Exempt’ if this is not required.

4. Once all required fields are completed click on ‘Next’
5. Review the details, and if everything is correct
6. Click ‘Save client’.

A message will appear on screen confirming that you have successfully created the client.