WA Relationship Authorisation Manager User Guide

Managing invitations to act on behalf of a business

An administrator for a business can invite a person to act on behalf of that business ("a **representative**"), either as another administrator ("**service administrator**") or as a standard user ("**service user**").

A business can be a public or private company, partnership, trust, superannuation fund, sole trader, incorporated association, strata title, co-operative, diplomatic/consulate body or high commission, syndicate (who has an ABN), local government jurisdiction or a state, territory or commonwealth agency or any other type of non-person entity.

Once invitations have been sent, any administrator for the business can:

• view the details of the invitation;

• resend the invitation code; or

• withdraw the invitation.

If you are not an administrator and require administrator rights you will need to submit a request and wait until your request has been approved. Please be aware that you may be asked to provide proof that you are allowed to act on behalf of the requested business.

If you wish to manage the invitations you have sent to another person to act on behalf of yourself, please refer to the instructions titled "Managing invitations for a person to act on your behalf".

Invitations which have not been accepted or declined will expire after 14 days.

STEP 1.

How to manage invitations to act on behalf of an entity

Sign into the WARAM. This will automatically start you at the "My dashboard" / "Welcome" page.

STEP 2.

Click on the "My entities" section tab..

STEP 3.

Click on the "View invitations" section tab.
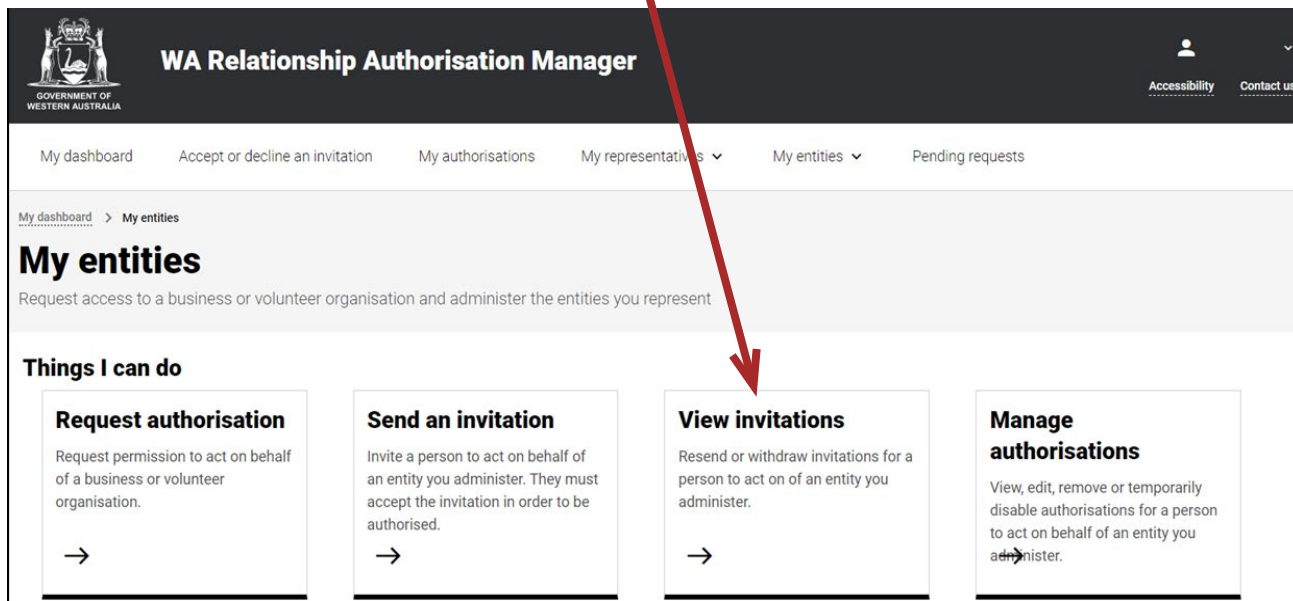
NOTE: If the "View invitations" section tab is not visible on this page then you have not been authorised to administer any entities. If you require administrator rights, you will need to submit a request and wait until the request is approved.

STEP 4.

You should now be able to see the "View invitations" page. Any pending invitations will be displayed towards the bottom of the page.
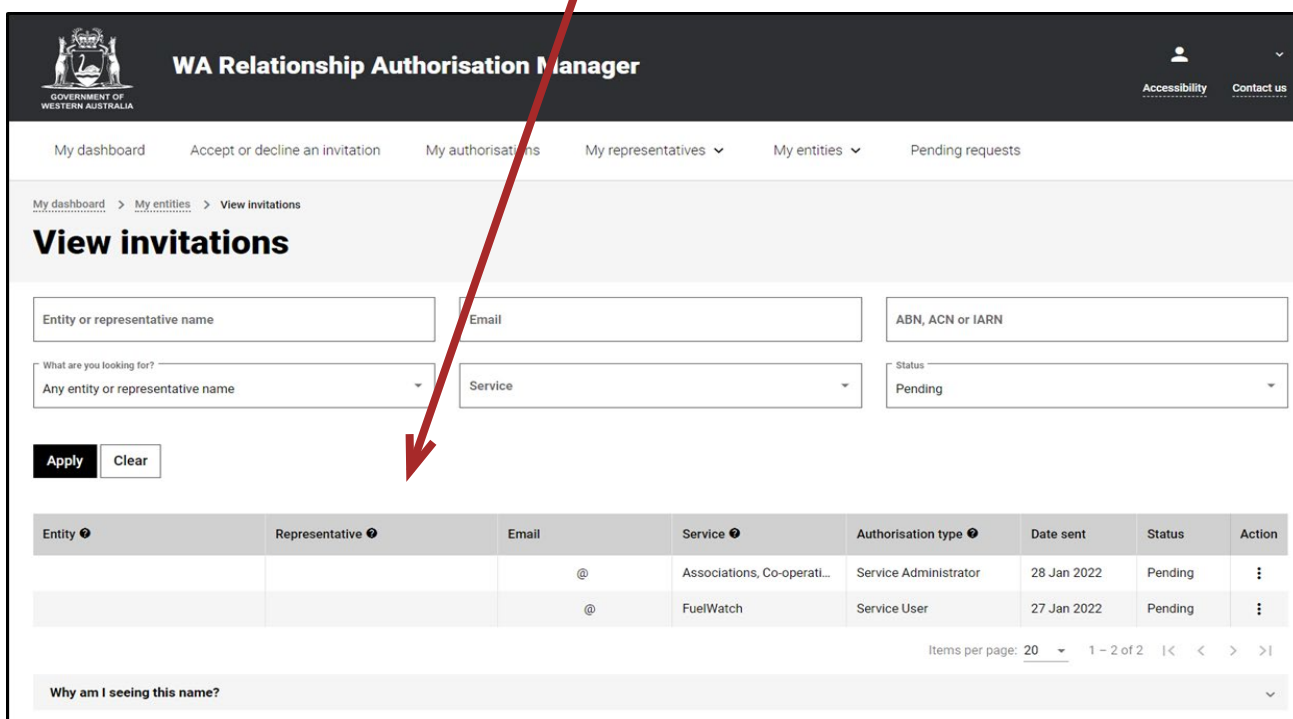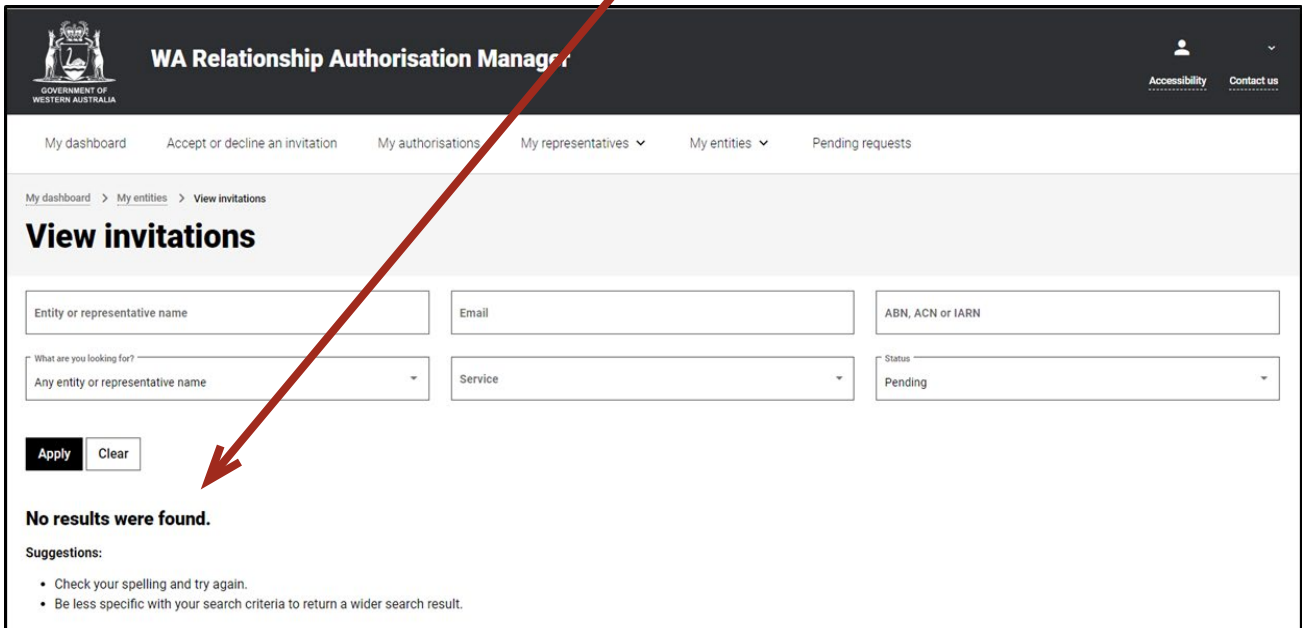
STEP 4. cont...

> **NOTE:** This page will display the first 20 invitations. To find the invitation you require, you can:
>
> - enter further details into the search criteria and then click the "Apply" button; or
>
> - scroll through the results using the arrows located at the bottom right side of the list.
>
> To view an old invitation, change the Status dropdown (which is always defaulted to "Pending") to "All" and then click the "Apply" button.
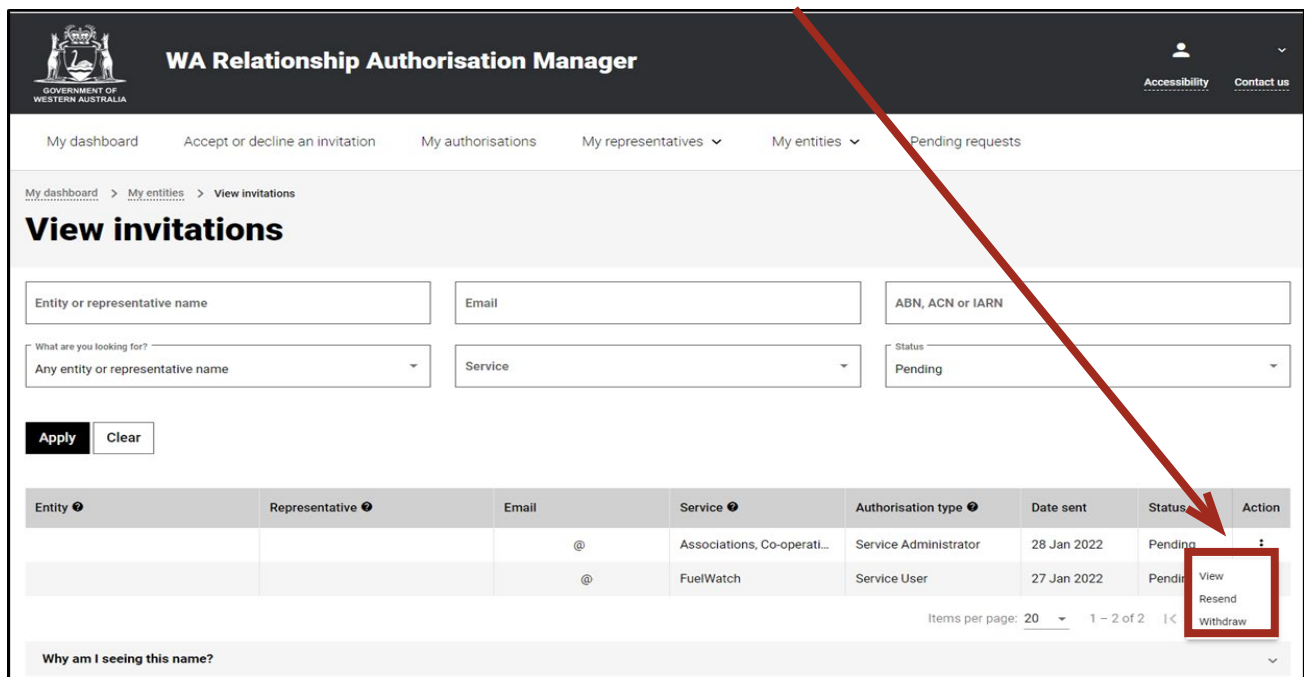
If there are no invitations the page will display "No results were found" and you should skip to Step 6. If there are invitations go to Step 5.

STEP 5.

Find the invitation you require in the list of invitations now displayed. Once you have found the invitation, click on the three dots located on the far right side under the Action heading.

If you select "View", the details of the selected invitation will be displayed. Click the "Close" button located to the bottom left to hide the invitation details.

Pending invitation details

Entity ❓
Name

ABN

This entity is also known as

Representative ❓
Name

Email
@

Authorisation details ❓
Service
Associations, Co-operatives and Charities WA

Authorisation type
Service Administrator

Start date
28 January 2022

End date
29 January 2022

Invitation sent details
Date sent
28 January 2022 11:14:52 am

[Resend] [Withdraw] [Close]

If you select "Resend", you will be asked to confirm if you wish to resend the invitation. Click Yes to continue or No to return to the screen.

NOTE: The resend function is limited to pending invitations which are resent to the associated email address. If any invitation details are incorrect, including the email address, you must withdraw the invitation and send a new invitation with the correct details.

You are sending a new invitation code to   @   for   to have authority to act for
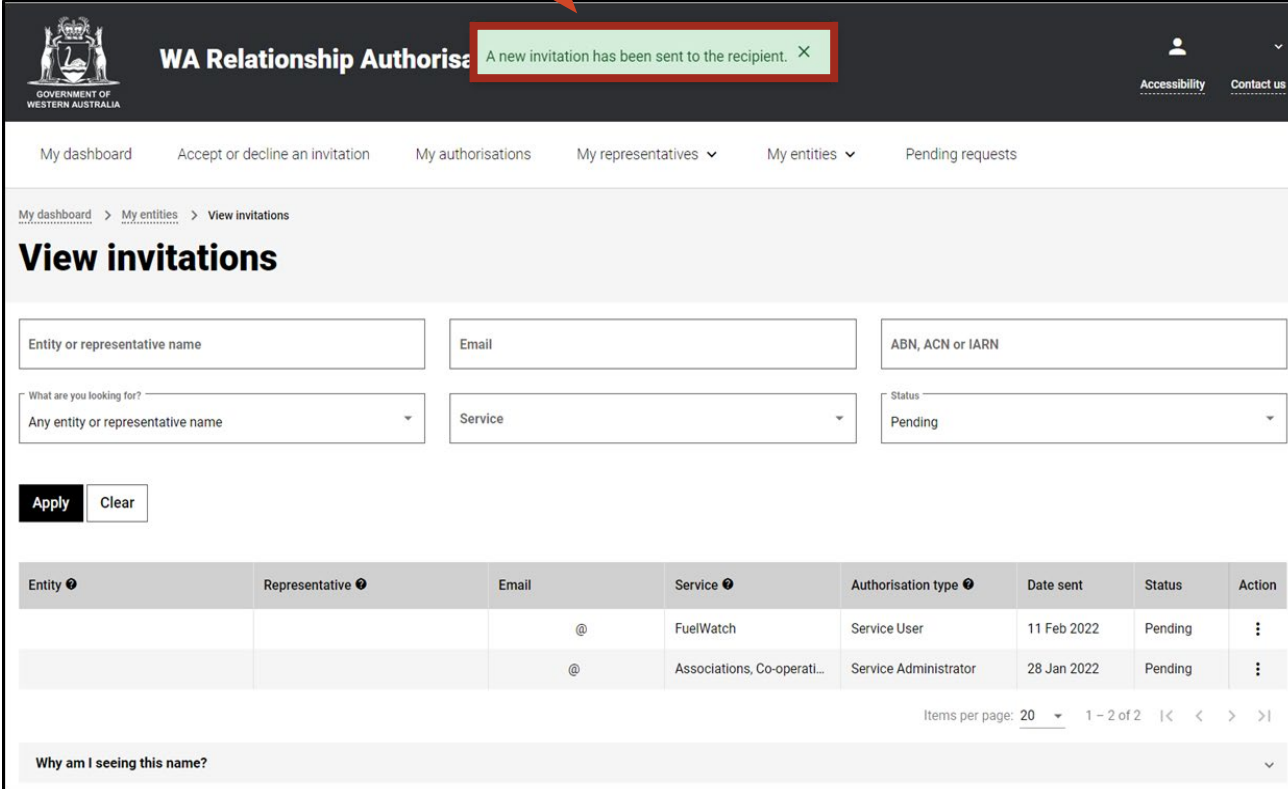
•

The invitation will have a new invitation code and previous codes can no longer be used to accept the invitation.

Do you want to continue?

[Yes] [No]

STEP 5. cont…

Confirmation the invitation has been resent will appear for 3 seconds at the top of the screen. The representative will then receive an email with a new invitation code. Please note, the old invitation code will now no longer be valid.
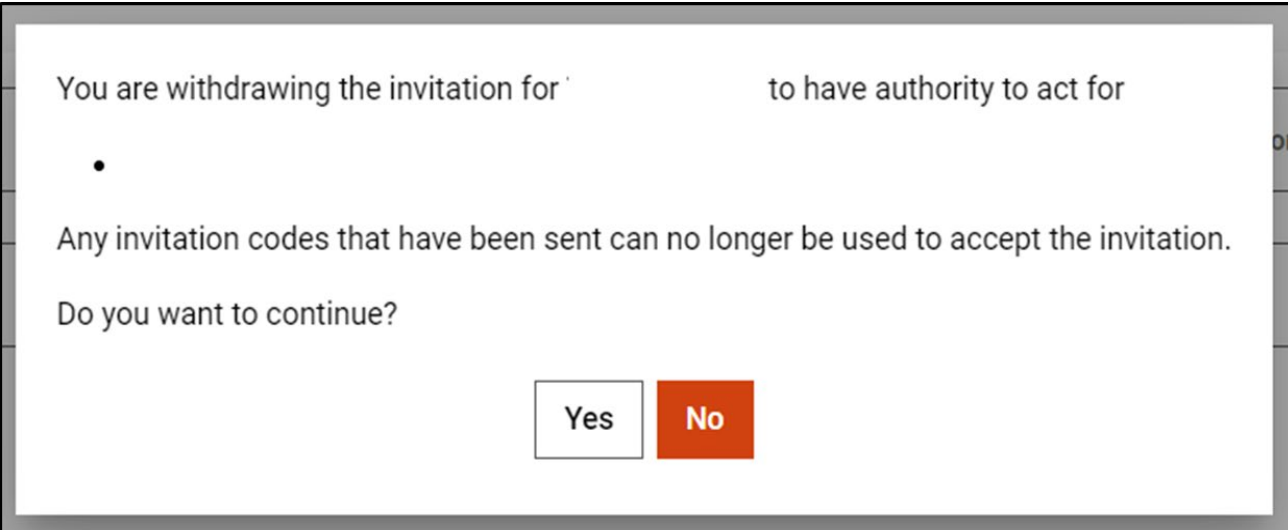

If you select "Withdraw", you will be asked to confirm if you want to withdraw the invitation. Click Yes to continue or No to retain the invitation. Withdraw is limited to pending invitations. Once withdrawn an invitation is finalised. To reinstate the invitation you will need to send a new invitation.
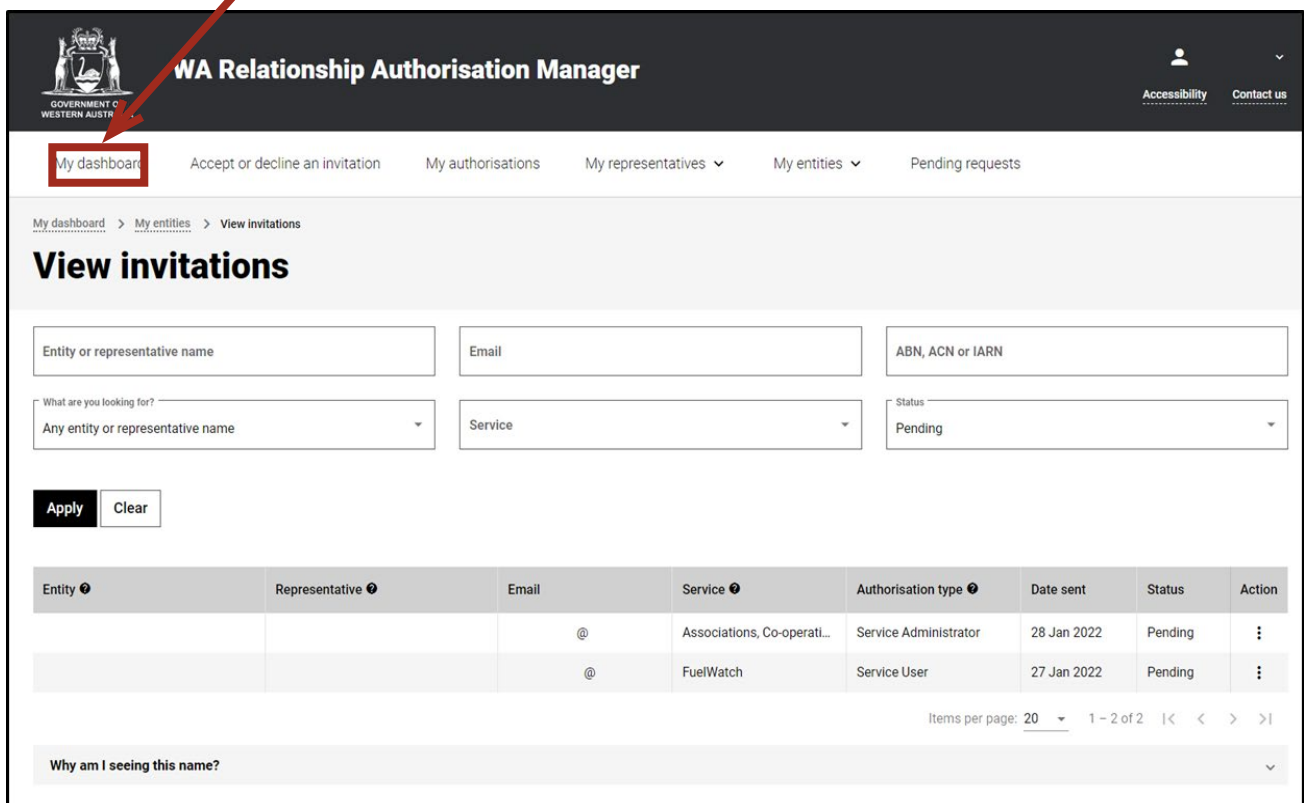

Once the invitation is withdrawn, it will no longer appear among the invitations on the "View invitations" page. The representative will receive an email advising them that the invitation has been withdrawn.

STEP 6.

To continue using the WARAM, click on the "My dashboard" tab located at the top of the page.

Alternatively you can sign out by selecting your name at the top of the page and clicking on the "Sign out" button or close the service via the x at the top of the browser.
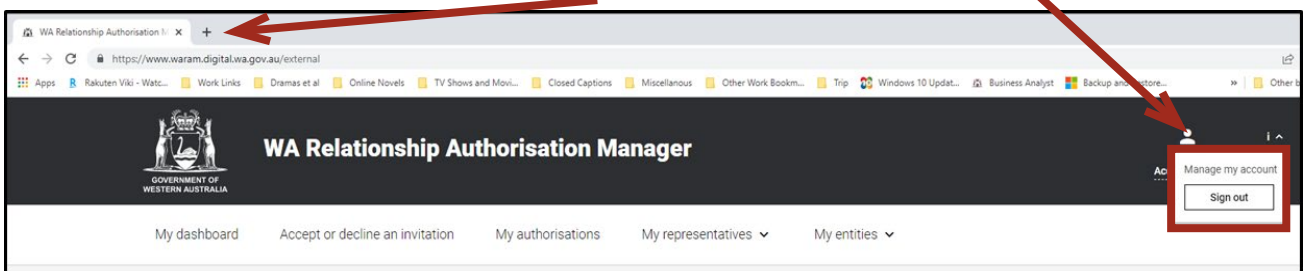
This completes the step-by-step instructions

Need further assistance?

Contact the [government agency which supports the service](#) you are trying to access.
Contact details are available:

1. the "Contact us" link found in the WARAM header; or

2. the "Need assistance?" section in the WARAM footer.