



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.

WA Relationship Authorisation Manager

My dashboard Accept or decline an invitation My authorisations My representatives My entities Pending requests

Welcome

If you are a first time or infrequent customer of the WA Relationship Authorisation Manager [please read this](#).

- Accept or decline an invitation**
Accept an invitation to act on behalf of a business or person. →
- My authorisations**
Businesses or people you are currently authorised to act on behalf of. →
- My representatives**
Invite and manage the people or businesses who are authorised to act on your behalf. →
- My entities**
Administer the business entities you represent or request access to a business. →

STEP 2.

Click on the “My entities” section tab..

WA Relationship Authorisation Manager

My dashboard Accept or decline an invitation My authorisations My representatives My entities Pending requests

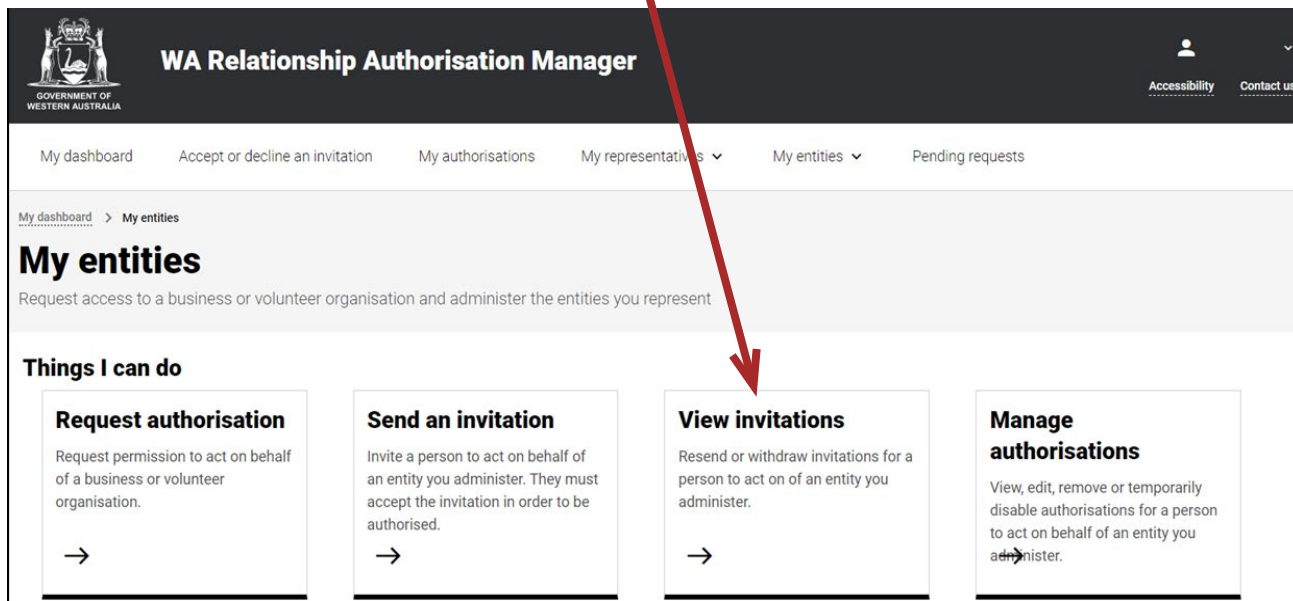
Welcome

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STEP 3.

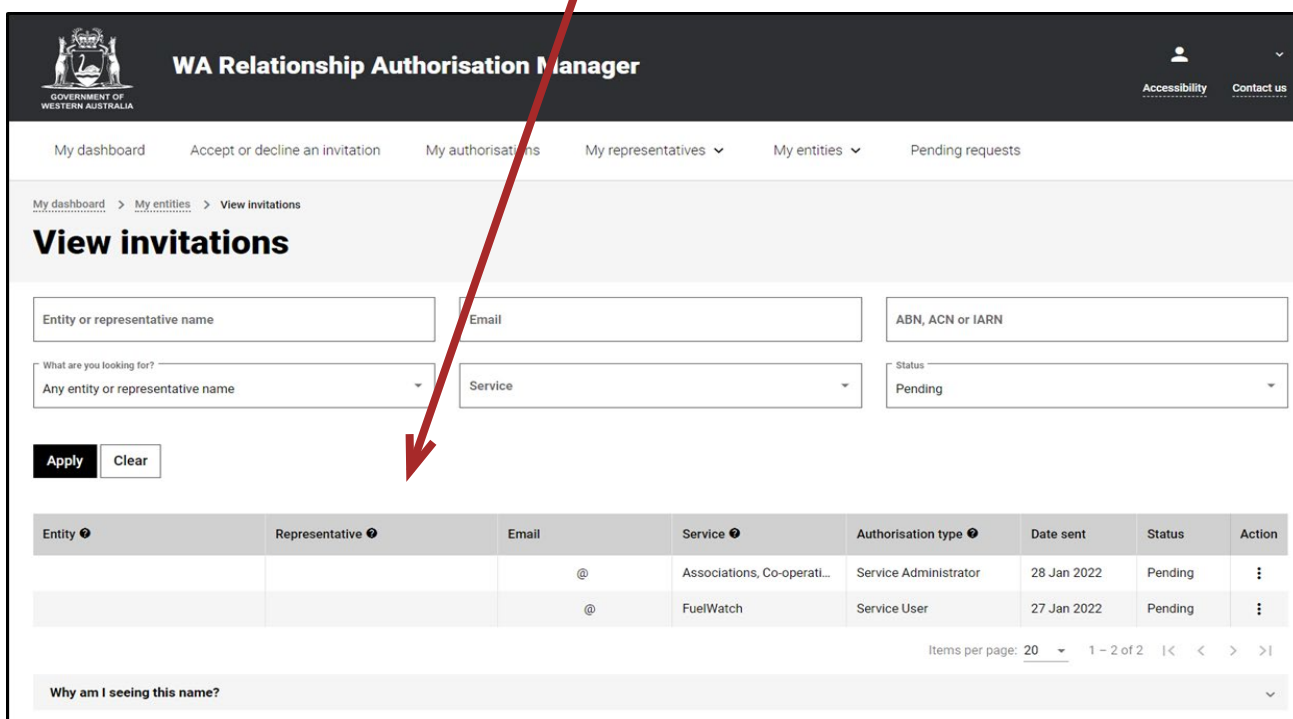
Click on the “View invitations” section tab.



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.



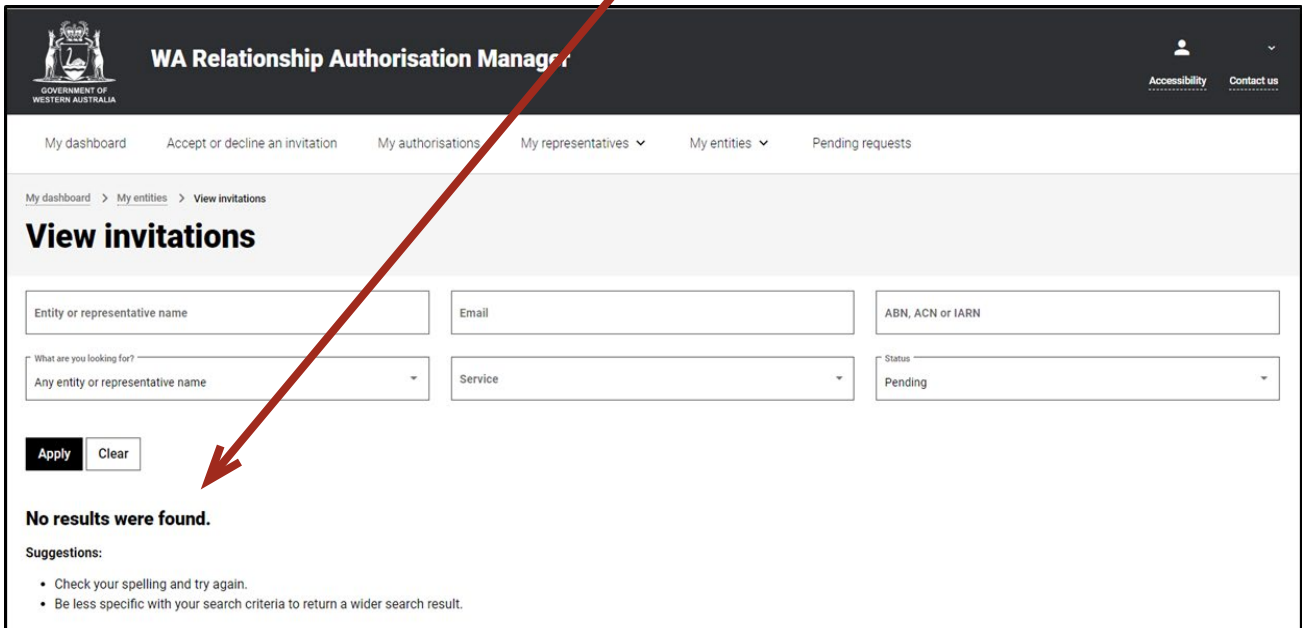
STEP 4. cont...

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.

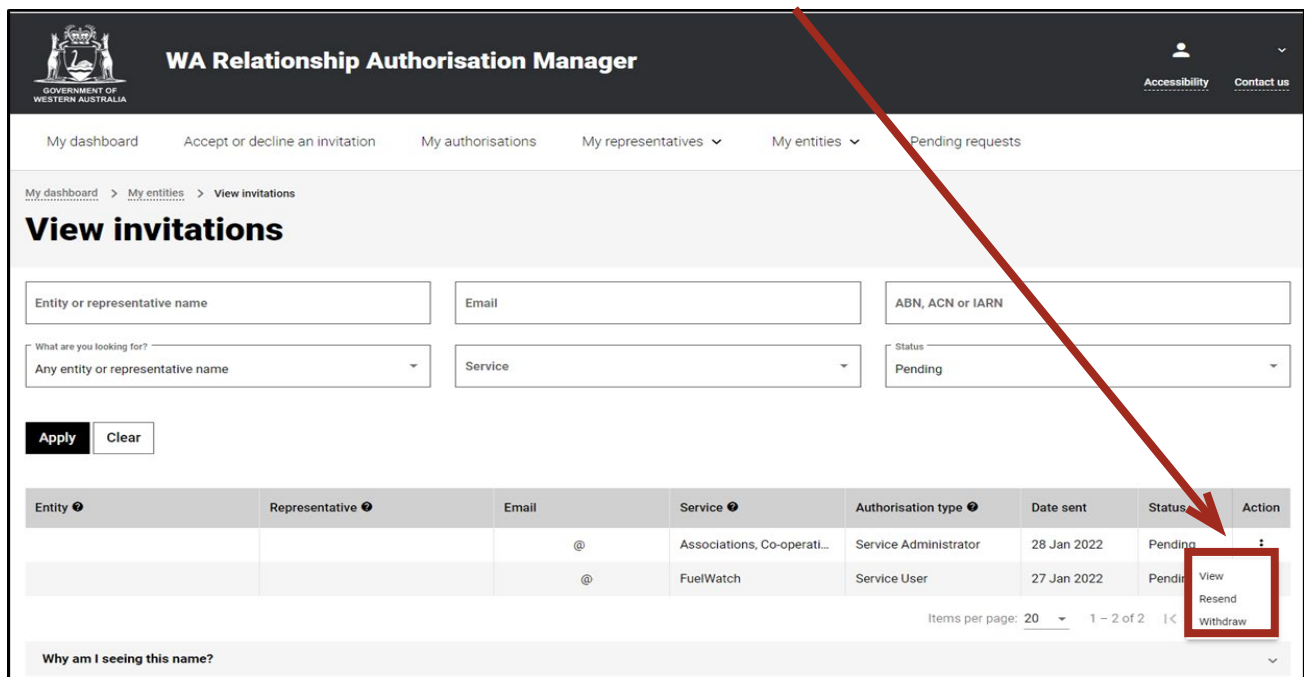
If there are no invitations the page will display “No results were found” and you should skip to Step 6. If there are invitations go to Step 5.



The screenshot shows the 'View invitations' page in the WA Relationship Authorisation Manager. The page has a dark header with the government logo and navigation links. Below the header, there are several tabs: 'My dashboard', 'Accept or decline an invitation', 'My authorisations', 'My representatives', 'My entities', and 'Pending requests'. The main content area is titled 'View invitations' and contains a search form with the following fields: 'Entity or representative name', 'Email', 'ABN, ACN or IARN', 'What are you looking for?' (with a dropdown menu), 'Service', and 'Status' (with a dropdown menu). Below the search form are 'Apply' and 'Clear' buttons. A red arrow points from the 'Apply' button towards the 'No results were found' message. The message states: 'No results were found. Suggestions: • Check your spelling and try again. • Be less specific with your search criteria to return a wider search result.'

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.



The screenshot shows the 'View invitations' page with a list of invitations. The search form is visible at the top. Below it, there is a table with the following columns: 'Entity', 'Representative', 'Email', 'Service', 'Authorisation type', 'Date sent', 'Status', and 'Action'. The table contains two rows of data. The first row has 'Entity' and 'Representative' columns, and the 'Email' column contains '@'. The 'Service' column contains 'Associations, Co-operat...'. The 'Authorisation type' column contains 'Service Administrator'. The 'Date sent' column contains '28 Jan 2022'. The 'Status' column contains 'Pending'. The 'Action' column contains a three-dot menu icon. The second row has 'Entity' and 'Representative' columns, and the 'Email' column contains '@'. The 'Service' column contains 'FuelWatch'. The 'Authorisation type' column contains 'Service User'. The 'Date sent' column contains '27 Jan 2022'. The 'Status' column contains 'Pending'. The 'Action' column contains a three-dot menu icon. A red arrow points from the three-dot menu icon in the 'Action' column of the second row to a dropdown menu that is open, showing the options: 'View', 'Resend', and 'Withdraw'. The 'View' option is highlighted with a red box. Below the table, there is a 'Why am I seeing this name?' dropdown menu. At the bottom right of the table, there is a pagination control showing 'Items per page: 20' and '1 - 2 of 2'.

Entity	Representative	Email	Service	Authorisation type	Date sent	Status	Action
		@	Associations, Co-operat...	Service Administrator	28 Jan 2022	Pending	⋮
		@	FuelWatch	Service User	27 Jan 2022	Pending	⋮

STEP 5 cont...

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 This entity is also known as

ABN

Representative ⓘ

Name Email

Authorisation details ⓘ

Service Authorisation type
Associations, Co-operatives and Charities WA Service Administrator

Start date End date
28 January 2022 29 January 2022

Invitation sent details

Date sent
28 January 2022 11:14:52 am

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

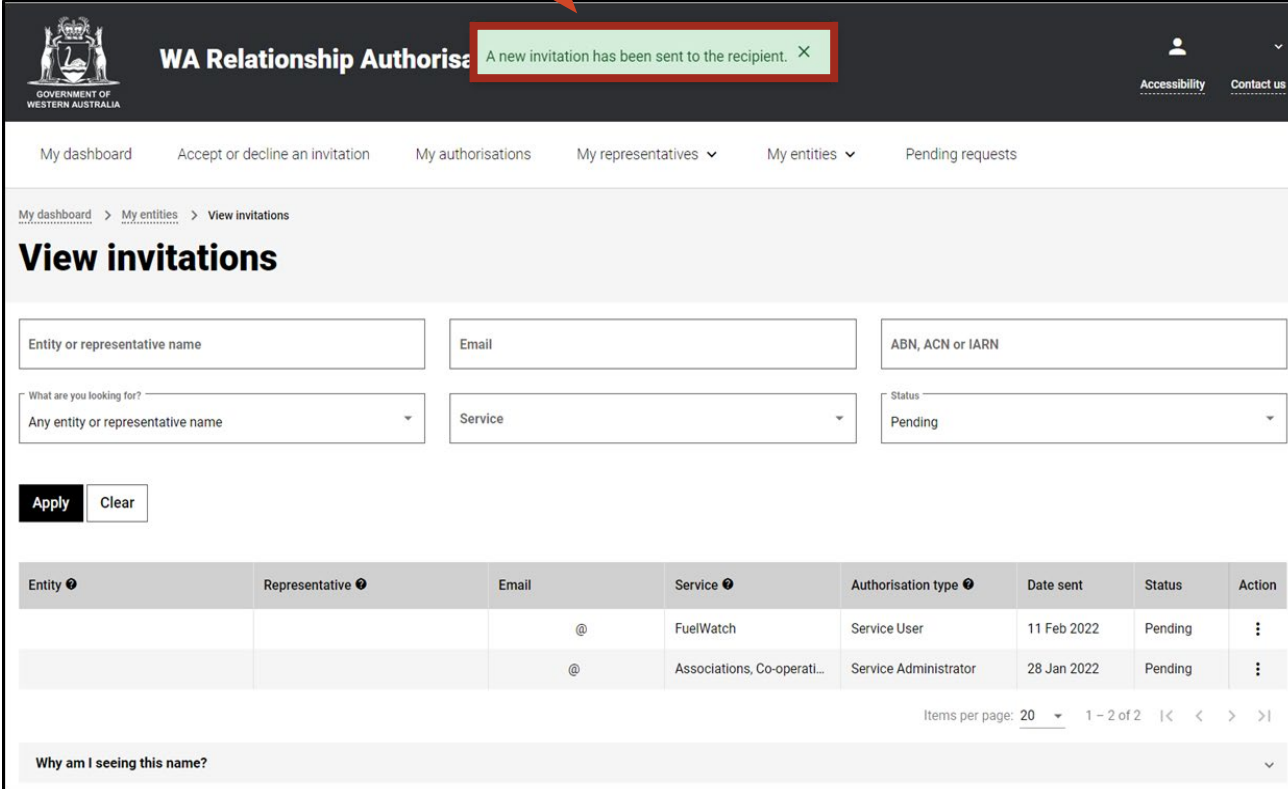
•

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?

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.

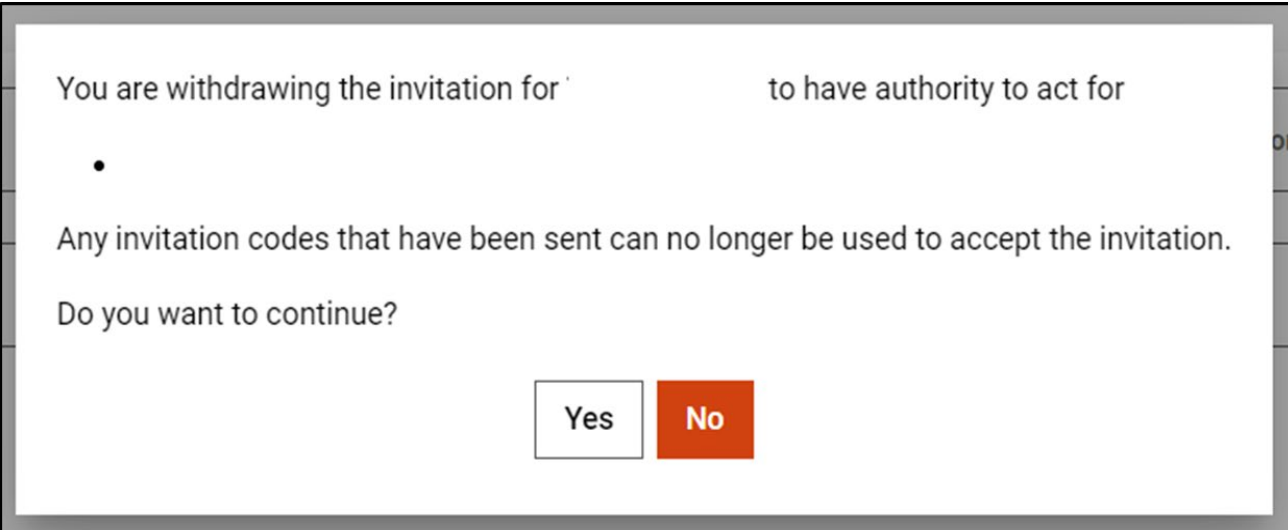


The screenshot shows the 'View invitations' page in the WA Relationship Authorisation system. A red box highlights a green notification message at the top: 'A new invitation has been sent to the recipient. X'. Below the notification is a search and filter section with fields for 'Entity or representative name', 'Email', 'ABN, ACN or IARN', 'What are you looking for?', 'Service', and 'Status'. There are 'Apply' and 'Clear' buttons. Below this is a table of invitations:

Entity	Representative	Email	Service	Authorisation type	Date sent	Status	Action
		@	FuelWatch	Service User	11 Feb 2022	Pending	⋮
		@	Associations, Co-operati...	Service Administrator	28 Jan 2022	Pending	⋮

At the bottom of the table, there is a pagination control showing 'Items per page: 20' and '1 - 2 of 2'. Below the table is a link: 'Why am I seeing this name?'.

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](#).



The dialog box contains the following text:

You are withdrawing the invitation for ' [redacted] ' to have authority to act for [redacted].

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Any invitation codes that have been sent can no longer be used to accept the invitation.

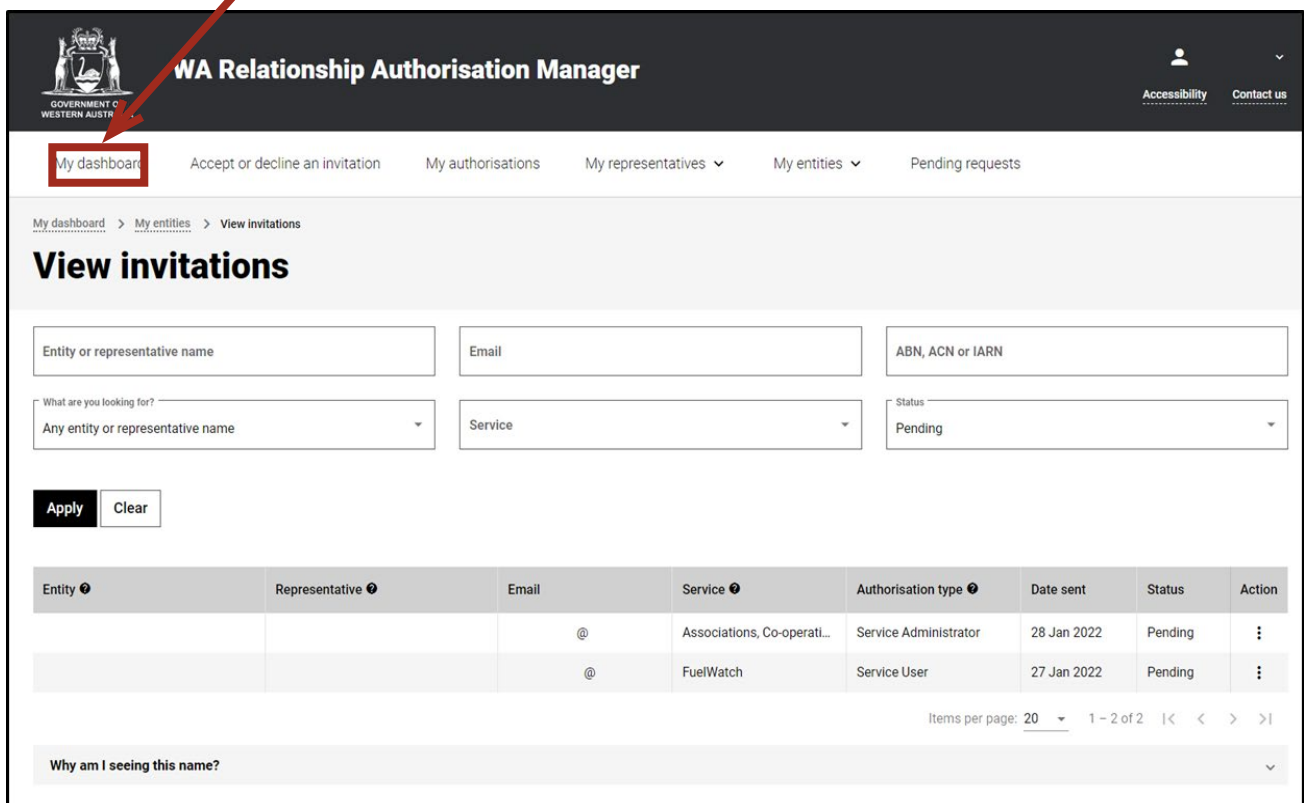
Do you want to continue?

Yes No

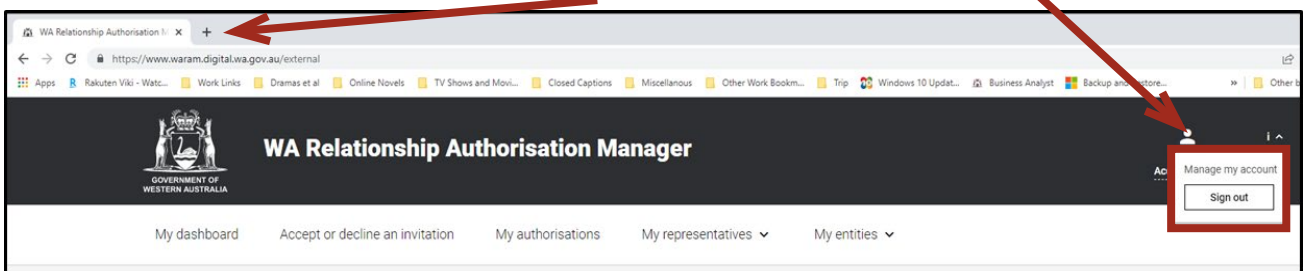
Once the invitation is withdrawn, it will no longer appear among the invitations on the “View invitations” page. The representative will receive an email advising them that the invitation has been withdrawn.

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.