

Corporate Online.

Amending Account details

Follow this guide to amend the **Description** and **Statement delivery method** for an **Account**.
To perform this procedure you require **Creator** access to Administration and a user role of **Super Administrator**.

Getting started

From the left-hand menu, select **Administration > Manage > Accounts**.

Manage
Organisation
Offices
Users
Accounts
Billing status

Corporate Online displays the **List of Accounts** screen.

Results			1 to 20 of 9
Account number	Description ▲	Currency	
<input checked="" type="radio"/> AU03 032000431376	Account A	AUD	
<input type="radio"/> AU03 032000431384	Account B	AUD	
<input type="radio"/> AU03 035000152979	Account C	AUD	

Select the account to be amended and click **Amend account access**. **Summary** is displayed.

Amend account access

Sub-tasks			1 to 3
Task type	Status	Date submitted	
<input checked="" type="radio"/> Details	Completed	Not applicable	
<input type="radio"/> Online Accounts groups	Completed	Not applicable	
<input type="radio"/> Online Payments users	Completed	Not applicable	

Select the **Details** task and click **Amend**.

Amend

Amending account details

Corporate Online displays the **Account details** screen.

Account details	
Bank:	AU03 - Westpac Australia, Trading Accounts
Account number:	032000431376
Account name:	AN032000431376
Currency:	AUD - Australian Dollar
Status:	Open
3rd party:	No
Account description:	<input type="text" value="Account A"/>
Enabled for Online Accounts?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Enabled for Stop cheque?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Account segmentation enabled?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Real-time enquiries available?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Enabled for Online Payments?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Bank account statement delivery method	
The Bank account statement delivery method for this account is currently:	
<input type="radio"/> Mail and Online	
<input checked="" type="radio"/> Online only	
You can request a change to the <u>Bank account statement delivery method</u> at any time.	

Complete the details as follows:

- Update the **Description** of the account to be used on Corporate Online screens.
- **Enable** the account for features where applicable.
- Update the **Account statement delivery** method.
- Click **Continue**. **Summary** is displayed.

Continue

Summary

The task is now ready for authorisation.

- Where the task includes a request to amend the bank statement delivery method for an account not owned by your organisation review and click in the box to agree to the **Authorisation and acknowledgment** terms.
- If you also have authoriser access and your organisation permits self-authorisation, review the details of the task and then click **Authorise now**.

Authorisation and acknowledgment

- This includes a request to amend the bank statement delivery method for an account not owned by your organisation. By making this request you are authorising the bank to act on behalf to stop paper statements.

Authorise now

Corporate Online updates the task's status depending on the authorisation model used by your organisation for Administrative tasks and displayed the **Pending tasks** list. If the task is no longer displayed the process is complete. If the task is detailed as "Part authorised" another authorisation is required. Ask another Administrator who can authorise to sign in and select **Administration** > [Authorise](#) from the left-hand menu.