

# Bankline support guides:

## Manage account preferences and services

### In this guide

- Learn how to set which balances are displayed across all summary balances and which subtitles are displayed.
- Learn how to use Account services to order cheque books, credit books and certificates of interest.
- Learn how to create, edit and delete your accounts sets.

You cannot manage account information preferences without the relevant privileges, which the Bankline Administrator needs to set up. Any user with an account information privilege can use Account services (see guides [Getting Started and Administration](#)).

### How to set your preferences for balances and subtotals

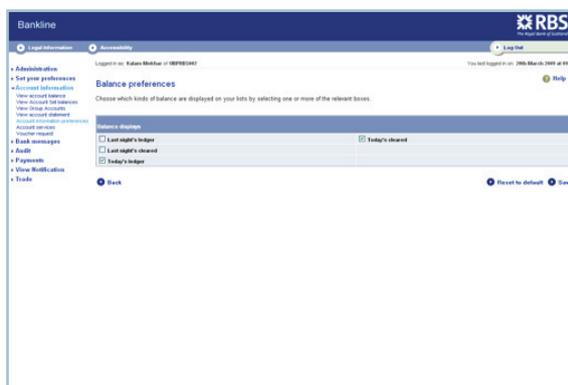
Use this to customise how the information for your accounts is displayed.

- 1 Select [Account information](#) from the lefthand menu, then click on [Account information preferences](#).

- 2 You can now choose from the following options:

#### A) Balance preferences:

- To edit these, either click on [Balances preferences](#) or on [Set which balances are displayed across summary balances](#). This brings up the 'Balance displays' panel. Check the boxes for the balances you want to include: last night's ledger, today's cleared, last night's cleared or today's ledger.
- Click [Save](#). You also have the option to [Reset to system default](#).



#### B) Subtotal preferences:

- To edit these, either click on [Subtotal preferences](#) or on [Decide how you would like your subtotals to be displayed](#). This brings up the 'Subtotal displays' panel. Check the boxes for the subtotals you want to include: Sort code, currency, accounts in credit, accounts in debit.
- Click [Save](#). You also have the option to [Reset to system default](#).



## How to order chequebooks, credit books and certificates of interest

- 1 Select [Account information](#) from the lefthand menu, then click on [Account services](#).

Or from the Account information page, click on [Order chequebooks, credit books and certificates of interest](#).

This brings up a list of your accounts.

- 2 Click on the underlined account number for the relevant account. This brings up the order form.

- 3 For chequebooks and credit books, check the boxes for what you want to order and state how many. For a certificate of interest, specify the period.

For either option, you also need to choose a method of delivery - your statement address, account-holding branch or other branch.

Click [Order](#) to submit.

- 4 Check your order and then click [Confirm](#). You can also [Cancel Order](#) or click on [Back](#) if you need to change anything.

You will see confirmation that your order has been sent. Chequebooks and credit books usually arrive within one week. Certificates of interest may take up to two weeks.

## Learn how to create, edit and delete your account sets

- 1 Select [Account Information](#) from the left hand menu then click on [Account Information Preferences](#).

- 2 Click on [Create, edit and delete your account sets](#).

From here you can create a new account set which enables you to group accounts together and display consolidated balances. This is useful for gaining a consolidated position for certain types of accounts (for example, in the same currency) or for different parts of your business.

From this screen you will see any existing account sets, and can select the account set name to edit or delete.

- 3 To create a new set, click on [Create Account Set](#).

Create an account set name and select the required reporting currency. You will see a list of accounts that you have permissions to view, select all the accounts you wish to include and click [Continue](#).

- 4 Check the details of your new account set and click [Create Account Set](#) to confirm.