

Bankline support guides:

Manage accounts and account sets

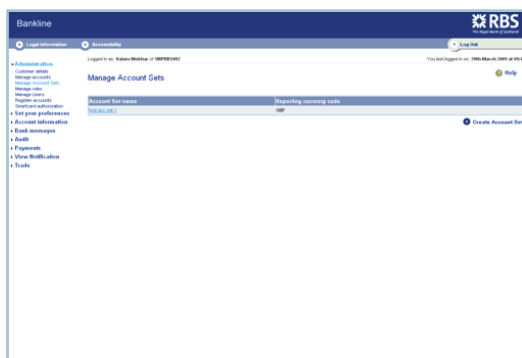
In this guide

- Learn how to view, edit and rename your accounts.
- Learn how to create account sets – accounts grouped for reporting purposes.

You will find these functions under [Administration > Manage Accounts](#) and [Administration > Manage Account Sets](#) in the left hand menu. You will need [Manage accounts](#) and [Manage customer account set privileges](#) to change these settings.

How to view and edit your accounts

- 1 From the [Administration](#) menu, select [Manage Accounts](#). This brings up a list of all the accounts you have registered in Bankline.



- 2 To view or edit an account, click on the relevant Account ID.
- 3 You can change the account alias. You can also choose to make the account confidential – this means only users with access to confidential accounts can see it (see [Set up users and give them roles](#) guide).

Please note the alias you use in Bankline will not affect the account name on your paper statements or chequebook.

Click [Continue](#).

- 4 [Confirm](#) your changes.

You can check your changes on the [Manage Accounts](#) screen.

If you can't see the changes you made in the first column, you may need to change your [Account ID preference](#) in [Customer Details](#) to use the alias as the account identifier. See the [Customise your Bankline service](#) guide for more information.

How to view and create accounts sets

Account sets offer a flexible and easy way to report the consolidated real-time balance of several accounts. For example, you may wish to view all of your US dollar accounts together, or accounts held at the same branch.

- 1 From the [Administration](#) menu, select [Manage Accounts Sets](#). This brings up a list of all the account sets you have already created.
- 2 To create a new account set, click [Create Account Set](#).
- 3 Enter a name and choose a reporting currency. Select the accounts you want to include, then click [Continue](#).
- 4 Check the box next to the users you want to have access to this account set. Click [Continue](#).
- 5 Check the details on the confirmation page, then click [Confirm](#).

How to edit account sets

- 1 From the [Administration](#) menu, select [Manage Accounts Sets](#).
- 2 From the list, click on the account set name you want to edit.
- 3 Check the details on the confirmation page, then click [Confirm](#).

You can now edit the name and change the reporting currency.

To change the accounts within the account set, check the boxes next to any accounts you want to add. Uncheck any you want to remove.

Click [Save Changes](#).

To edit the list of users who have access to an account set, before you click on [Save Changes](#), click on [Assign users to Account Set](#).