Adding accounts & account management on Bankline

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NatWest

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In this guide we'll show you how to add, remove and manage your accounts. You'll need the relevant administration privileges to be able to follow the steps in this guide

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Introduction to accounts

Let’s start by looking at the different types of accounts you can add to Bankline:

Account Types

You can register the following account types on Bankline:

- Current accounts
- Deposit accounts, including notice accounts

Helpful tips

You can register a maximum of 999 accounts on one Bankline profile.

Remember Bankline charges relate to the number of accounts you have registered on your profile, for more information on charges visit Get to know Bankline.

Bankline has two classifications for accounts, own accounts and 3rd party accounts:

Own Accounts

On the Bankline application form, you’ll have given account details of which account to register. This is now classed as your ‘main’ account on Bankline.

Users with the relevant administration access can add any accounts that are in the same legal entity as your ‘main’ Bankline account by following the steps on the next page for ‘Adding your own accounts’.

Third Party Accounts

Third party accounts are any accounts that are **not** in the same legal entity as your ‘main’ account on Bankline.

Users with the relevant administration access can add third party accounts. You‘ll just need to get the owners of these accounts to give authorisation to add them to Bankline, by signing a third party account form. You can find instructions on the next page for ‘adding third party accounts’.

How do I register accounts?

Adding your own accounts

To register an account in the same legal entity as your main account:

1. Go to Accounts then 'Register accounts' then 'Register your existing accounts'.
2. Choose 'Domestic accounts' or 'International accounts'.
3. Accounts which already exist in the same legal entity as your main account will appear as a list.
4. Scroll through the pages by choosing the page numbers below the list or use the 'search for an account' box to find the account(s) you want to add.
5. Check the boxes to the left of the account(s) you want to register (you can select multiple accounts) and 'Continue'.
6. You'll then have to confirm that you're aware this may increase your charges and 'Submit'.

If you have dual administration switched on, you may need a second user with the relevant administration access to accept any of these changes.

You may now need to assign these account to any 'customer' or 'account specific' roles you have, take a look at How do I assign an account to a role?

Adding third party accounts (accounts not in the same legal entity)

To register a third party account:

1. Go to Accounts then 'Register accounts'.
2. Select 'Register new accounts' then 'Continue'.
3. Choose if the account is a sterling or currency account.
4. Answer if this is an account held by another company.
5. Enter the details of the account and then 'Add to list'.
6. Repeat for any other accounts you need to add.
7. Once all accounts are listed, you'll then need to confirm the names of the accounts match what is on their bank statement and 'Review request'.
8. Tick the two confirmation boxes and 'Submit'. If you have dual administration switched on, you may need a second user with the relevant administration access to accept these changes.
9. If you've answered 'yes' to the 'account held by another company, you'll now need to download and complete the third-party mandate form (you'll find out more in our Third-party account guide).

You'll be given a SR (service request) number, make a note of this and you can track the progress in Accounts and 'Account servicing requests'.

After the third party forms have been received and checked by us, or your service request has been actioned, all users with administration access to accounts will get an email confirming when the account has been added to Bankline. This will include information on how to add this to 'customer' and 'account specific' roles. Or take a look at:

How do I assign an account to a role?

How do I remove accounts?

Removing accounts

If you need to remove any accounts from Bankline, go to 'Accounts', 'Register accounts' and then follow these steps:

1. Choose 'De-register accounts' then 'Continue'.
2. Read the important information then select the account(s) you want to de-register (you can't de-register your main Bankline account, so you won't be able to select this).
3. Now 'Continue'.
4. Review your request, tick the box to confirm you understand what de-registering means and 'Submit'.

If you have dual administration switched on, you may need a second user with the relevant administration access to accept these changes.

Tips for adding accounts:

Any accounts you register on Bankline will automatically be available in '**master'** or **'all account'** roles'.

How do I manage my accounts?

Now you have all the accounts you need on Bankline, here are some ways you can help organise them:

Make accounts confidential and give accounts an alias (nickname)

Decide who can use confidential accounts, you can then mark an account as ‘Confidential’.

If you want a user to be able to see a confidential account, you’ll need to go to Administration then ‘Manage users’, select the user and scroll down to the ‘Security’ section and ‘Edit’. Indicate you want the user to see confidential accounts and ‘Review changes’ and ‘Confirm changes’

You’ll only have this option if you have users who can view confidential accounts.

From 'Accounts' go to 'Edit account names and confidentiality' then select the account you'd like to make confidential by checking the 'Confidential box’. You can also create an account alias (nickname) from here to make it easier to identify your different accounts in Bankline.

If you have dual administration switched on, you may need a second user with the relevant administration access to accept these changes.

Organise your accounts using account sets

An account set is a way for you to group any of your accounts together for reporting purposes. For example, you might want to view the overall balance of your Euro accounts or all accounts in a certain sector of your organisation.

To create account sets:

1. Go to ‘Accounts’, then ‘Account sets’.
2. Select ‘Create new account set’.
3. Give the set a name and choose the accounts you want to include.
4. Select the users you want to access the set and ‘Review’.
5. Check the details and ‘Confirm’.

If you have dual administration switched on, you may need a second user with the relevant administration access to accept these changes.

Staying safe when using Bankline

- **Always** log in from www.natwest.com/bankline.
- We’ll **never** ask for your **full** password when logging in (we’ll only ask for certain characters).
- We’ll **never** ask for **any** part of your password or smartcard codes over the phone.
- We’ll **never** text, email or WhatsApp you a QR code to scan.
- **Never** share passwords, PINs or smartcard codes with anyone. Each user should have their own to log in.

You can also find more help with Bankline in our Bankline Help and Support hub