Review and edit user permissions in Corporate Online

This guide includes step-by-step instructions on how to check that your user permissions on legacy are up-to-date and meet your requirements ahead of your move to Commercial Banking Online.
Review and edit user account access permissions

Follow the steps below to check that your users’ account access permissions are up-to-date and meet your operational requirements.

1. Sign into Corporate Online
2. Navigate to Account Access
3. Review which of your users have access to which accounts by
   1. selecting a User Group and then selecting
   2. which Username you wish to review
   OR use the other option to review users by Account Type.
4. Review and edit the accounts the user has access by ticking or un-ticking the accounts as required.
5. Select Save.

Repeat Steps 3-6 for each Username within each User Group as required.
Review and edit user payment permissions

Follow the steps below to check that your users’ payment permissions are up-to-date and meet your operational requirements.

1. Select **Permissions**.
2. Navigate through the various tabs to review and edit the payment permissions the user has by ticking or un-ticking the permissions as required.
3. Select **Save**.

Repeat Steps 1-3 for each **Username** within each **User Group** as required.
Find out more

We hope you have found this Guide clear and easy to understand but remember, our Helpdesk team are always ready to answer any query you may have.

You can reach them on 0345 300 6444† between 8am – 6pm, Monday to Friday excluding bank holidays.

† Telephone calls may be recorded for security purposes and monitored under our quality control procedures.

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