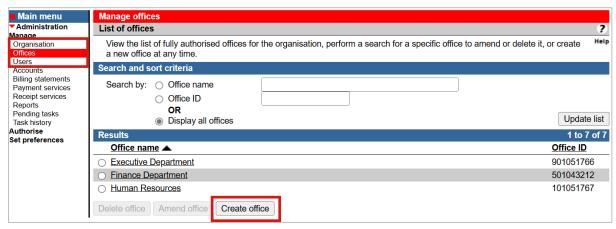# Corporate Online

Creating an office.

Follow this guide to create a new office within your Corporate Online Organisation.
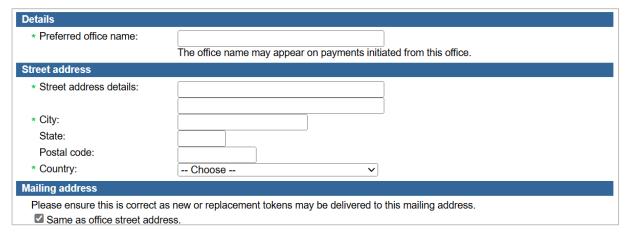
To perform this procedure, you require **Creator** access to Administration and a user role of **Super Administrator**.

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

2. Select **Create office**.

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

3. Complete the details as follows:
   - Enter the **Preferred office name** for the office. It should reflect the legal or trading name of the entity.
   - Enter a **Street address** for the office. The office address is used for all Westpac mail to Corporate Online users who nominate this office as their primary mailing address. This includes Welcome letters, PINs, and Secured Tokens. If you want mail sent to a PO Box, enter this as the Mailing address.

- Nominate the **Billing account(s)** for this office.
- Select to have fees for this office charged to a **billing statement** used for an existing office or select to establish a new billing statement for this office.
- Select **Continue**. Corporate Online displays the **Assign applications** screen.

4. Complete the screen as follows:
   - Select the applications to be assigned to the office from the not assigned list on the left and then select **Add**.
     OR
   - To select all applications, select **Add all**.
   - Select **Continue**.

What happens next depends on the applications assigned to the office, and what additional information Corporate Online needs you to specify. Tasks for completion may include:

✓ **Account groups** - Create the account groups for this office. These define how your users will be able to access account information for this office.
✓ **Receipt services** - Assign the receipt services you want accessible from this office.
✓ **Payment accounts** - Assign the accounts you want to be able to make payments from via this office.
✓ **Payment services** - Assign the payment services you want available for importing and creating files.
✓ **Foreign exchange** - Select whether you want to allow cross-currency payments to be made through the office.

5. Complete the details and select **Continue** on each screen. **Summary** is displayed.

Summary

The task is now ready for authorisation. If you also have authoriser access and your organisation permits self-authorisation:

6. Where an account not owned by your organisation has been nominated as an office billing account review and select in the box to agree to the **Authorisation and acknowledgment** terms.
7. Review the details of the task and then select **Authorise now**.

   If the "Create office" task requires no further authorisation, Corporate Online displays a **confirmation** screen. If the "Create office" task requires a second authorisation, the task will be displayed at "Part authorised' on the Pending tasks screen. Ask another Administrator who can authorise to sign in and select **Administration** > **Authorise** from the left-hand menu.

   Note: Once the new office has been approved and billing account(s) established, the Administrators involved in creating and authorising the new office will receive a confirmation message. Follow the steps in the confirmation message for how to assign the new office to your Corporate Online users.