

# Credit Card Setup from the EFT Customer List

Last Modified on 01/20/2023 11:15 am EST

On the main application menu, expand the Client Management module, then select the EFT Customer menu option. The EFT Customers listing will be displayed. Click on the New button at the lower right of the form to setup a new credit card or bank account.

□

The remainder of the process is the same for setting up a credit card from a customer record. Click on the link for the remainder of steps to follow.

[Setup a Credit Card from a Customer Record](#)