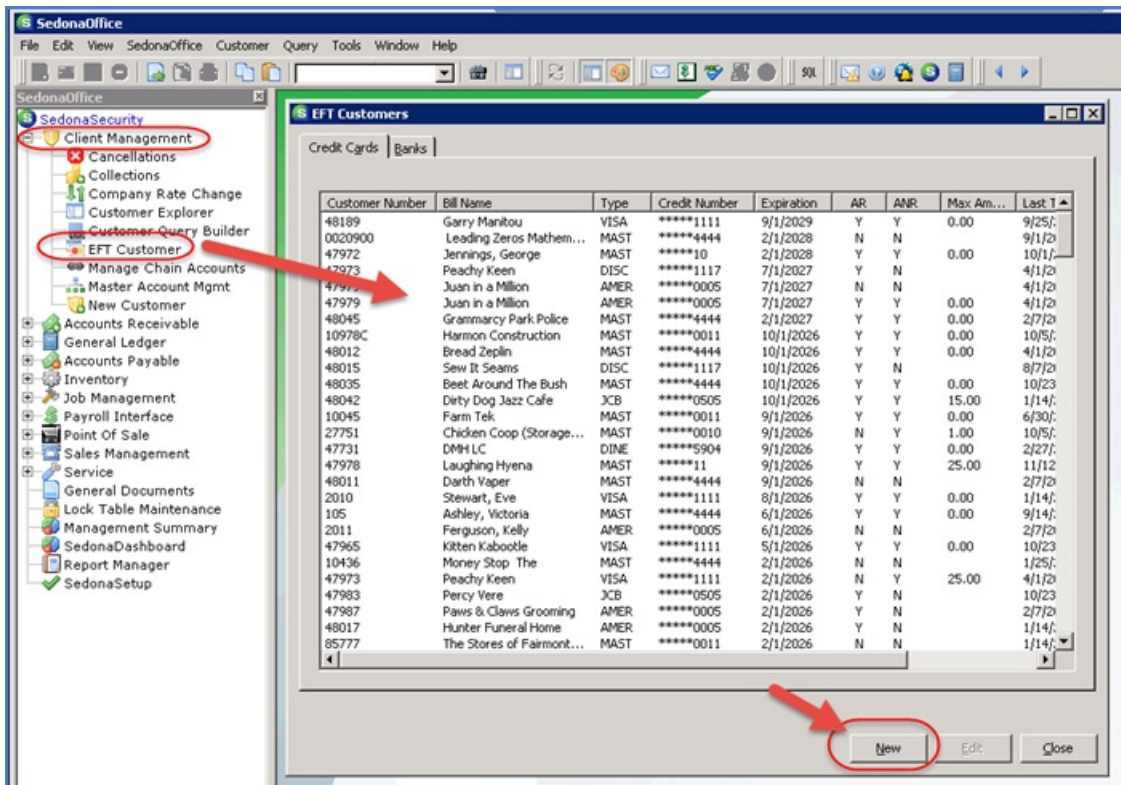


Customer Bank Setup from the EFT Customer List

Last Modified on 06/01/2026 1:07 pm EDT

On the main application menu, expand the Client Management module, and select the EFT Customer menu option. The EFT Customers listing opens. Click 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 customer bank account from a customer record. Click on the link for the remainder of steps to follow.

[Setup a Customer Bank Account from a Customer Record](#)