

Customer Bank Setup from the EFT Customer List

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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.

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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](#)