

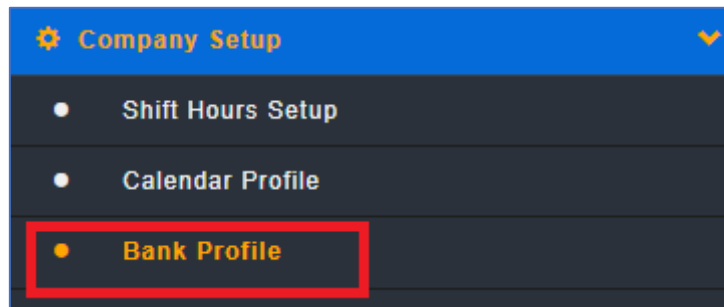
User Guide

How to Create New Bank Profile or Payee Bank




HOW TO CREATE NEW BANK PROFILE OR PAYEE BANK

1. Go to Company Setup → [Bank Profile](#).



2. Click .

A screenshot of the 'Bank Information' form. The form is divided into two main sections: 'Bank Information (*Denotes Required)' and 'Contact Information'. The 'Bank Information' section includes fields for 'Please select country', 'Bank Name', 'Acronym', 'Swift Code', 'Branch Name', 'Branch Code', 'Bank Code', 'Prefix', and 'Address'. The 'Contact Information' section includes fields for 'Contact person', 'Primary Email Address', 'Alternative Email Address', 'Mobile No.', 'Office Phone No.', and 'Fax No.'. There are 'Add' and 'Restore' buttons in the top right corner.

3. Select the (1) Bank that you wish to add.
4. Fill in (2,3) if you have the information else just leave it blank.
5. Once done, click .

A screenshot of the 'Bank Information' form with fields 1, 2, and 3 highlighted. Field 1 is the 'Bank Name' dropdown menu. Field 2 is the 'Address' text area. Field 3 is the 'Contact Information' section, which includes fields for 'Contact person', 'Primary Email Address', 'Alternative Email Address', 'Mobile No.', 'Office Phone No.', and 'Fax No.'. There are 'Save' and 'Cancel' buttons in the top right corner.

6. You may then go to *Employee Profile (Admin)* -> *Payment Info [tab]* and **assign** the Newly Created Bank for the employee.