Adding a bank account number to the payment section under bookings

3 years ago · Updated

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▼ For Headquarters, Supervisor, Sales Manager user access roles only
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Project > (Project Name) > Edit > Payment Setup

You can always add your company's bank account number to the payment section of your bookings thus, allowing your agents/sales staff to be able to refer to it at any time.

1. Click **Projects** at the Showroom homepage
2. Click on the specific project you would like to add the bank account number in
3. Click **Edit** at the top right hand corner
4. Click **Payment Setup** on the left menu bar
5. Under the **Bank Accounts** section, click **Add**
6. Select your desired bank from the left drop down menu
7. Input the bank account number in the text box on the right
8. Click  to add the details entered into the project
9. Click **Save** on the top right hand of the screen to finalize your changes

Note: The account number will only appear when either bank transfer or cheque is the method of payment during the booking process.

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