

Bank Account

KONNECT ANALYTICS customer [Search] [User Icon]

Prasanth P@Konnect Demo*/Konnect Demo Admin

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Home (7) | Summary | Customer: Customer - 01 AB... ✕

Favourites [Dropdown] [Add Icon]

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Customer > Bank Account

Record saved

Bank Accounts

Client: Konnect Demo Organization: *

Customer Name: ABB India Ltd.

User/Contact: Customer 1 [Dropdown]

☒ Active Account Usage: Both [Dropdown]

Bank: State Bank_-1 [Dropdown] Bank Account Type: Cash [Dropdown]

Account No: 82849128491212 IBAN: [Text]

Reference

Account Name: Deposit Account Account Street: [Text]

Account City: Coimbatore Account Zip/Postal: [Text]

Account State: Tamilnadu Account Country: [Text]

Driver License: [Text] Social Security No: [Text]

Account EMail: [Text]

Address verified: Match Zip verified: [Text]

Customer Payment Profile ID: [Text] Payment Processor: [Text]

Critical Fields

1. Bank : We should select the bank name from the bank master.(Ex : State Bank)
2. Account Name : We should mention the Account Name .

Critical & onetime setup fields

Non-Critical Fields

1. User/Contact : We select the user contact name from the contact user tab.(Ex : Customer 1)
2. Account No : Used to maintain the Bank Account Number.
3. Bank Account Type : Used to select the Account type like Card,Cash,Checking,Current Account,Fixed Deposit ,OD,Recurring Deposit Account,Salary Account, Savings.
4. Account Usage : Used to maintain the usage like Direct Debit,Direct Deposit,Both,None.

Zoom condition's

Validation

Revision #3

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