

Neilon Project Management Invoice

Company Bank Accounts Setup

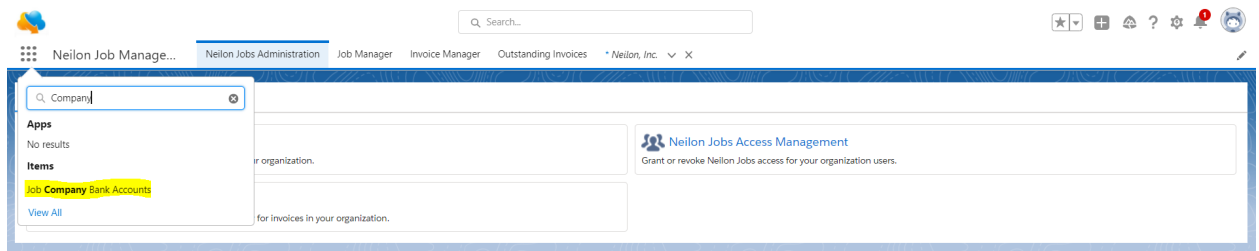
Introduction

The Company Bank Accounts are bank account details for customers to make payments. You can have multiple company bank accounts in your org and users can select the right bank account for the customer when creating a new invoice.

Create New Invoice Company Bank Accounts

Follow the below steps to create invoice company bank accounts.

1. Open App Launcher.
2. Search and open **Job Company Bank Accounts**.



3. Click **New**.
4. Provide Bank Account details like Account Holder Name, Account Number, IBAN, SWIFT Code, Phone, Email, Company Logo, Term & Condition etc.

New Job Company Bank Account

Information

* Job Company Bank Account Name

Neilon Technologies LLP

* Account Number

23234231215784342

Address

Street 13, Vasant Vihar, New Delhi, India

* Bank Name

State Bank Of India

Bank Address

Street 45, Ahmedabad, Gujarat, India

Bank Branch

Satellite

IBAN

23147

ABA Number

651323

Cancel

Save & New

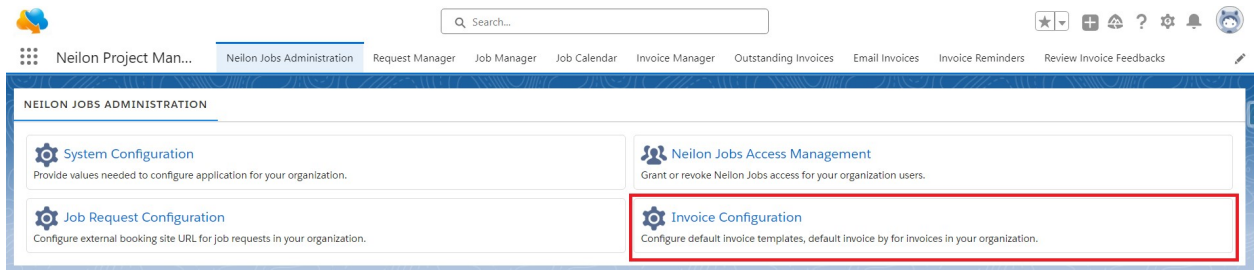
Save

5. Click **Save**.

Set Default Invoice Company Bank Account for New Invoices

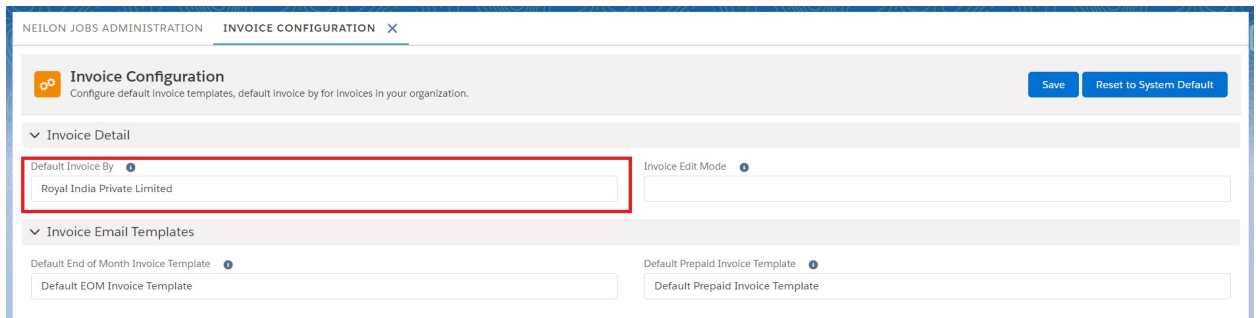
A job company bank account name set in the **Default Invoice By** will be auto-populated in the **Invoice By** field of the invoice while creating a new invoice. Follow the below steps to set the **Default Invoice By**.

1. Navigate to the **Neilon Project Management** application from the App Launcher.
2. Go to the **Neilon Jobs Administration** tab.
3. Click on **Invoice Configuration**.



- Put the job company bank account name in the **Default Invoice By** field which you want to use as default job company bank account for the invoice while creating a new invoice.

Note: If you have not created the job company bank account, then create it by following the **Neilon Project Management Invoice Bank Accounts Setup** guide.



- Click on the **Save** button to save the configuration.