

Neilon Job Management Invoice

Bank Accounts Setup

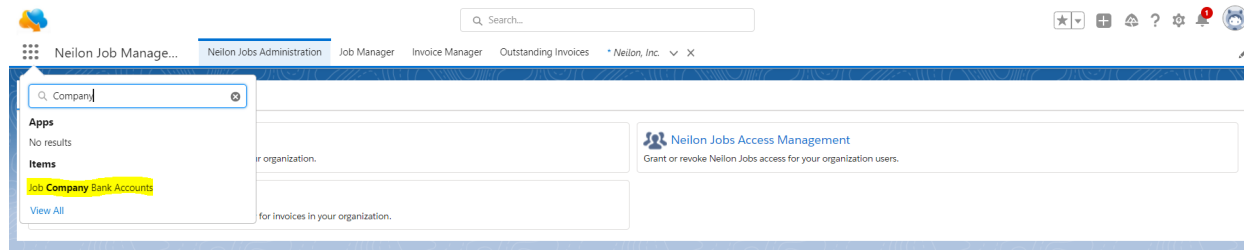
Introduction

Company Bank Accounts are bank account details in which customers will be allowed to do payment. You can have multiple company bank accounts in your org and users can select the right bank account for the customer at the time of creating a new invoice.

- **Create New Company Bank Accounts**

Follow below steps to create Company Bank Accounts in your Salesforce org.

- Open App Launcher
- Search for **Job Company Bank Accounts**



- Click **New**
- 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

* Account Number

Address

* Bank Name

Bank Address

Bank Branch

IBAN

ABA Number

- Click **Save**
- **Set default Company Bank Account for new invoices**

Follow below steps to set default Company Bank Account for new invoice in your Salesforce org.

1. Go to Neilon Jobs Administration > Invoice Configuration
2. Provide name of Job Company Bank Account name you want to set as default bank account in **Default Invoice By**

The screenshot shows the 'Invoice Configuration' page within the 'Neilon Jobs Administration' section. The page title is 'INVOICE CONFIGURATION' with a close button (X). Below the title, there is a sub-header 'Invoice Configuration' with a description: 'Configure default invoice templates, default invoice by for Invoices in your organization.' To the right of this sub-header are two buttons: 'Save' and 'Reset to System Default'. The main content area is divided into two sections: 'Invoice Detail' and 'Invoice Email Templates'. Under 'Invoice Detail', there is a 'Default Invoice By' dropdown menu with 'Neilon Technologies LLP' selected. Under 'Invoice Email Templates', there are two dropdown menus: 'Default End of Month Invoice Template' with 'EOM Invoice Generic' selected, and 'Default Prepaid Invoice Template' with 'Prepaid Invoice Generic' selected.

3. Click **Save**