

# Adding a new Bank Account to CRM



This guide provides a straightforward method for adding a new bank account to your CRM.

By following the clear, step-by-step instructions, users can avoid common errors.



**Alert!** Only add accounts that are required and be sure of the data you are adding. If an error is made it can be edited. To remove an account contact CRM Support

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1. Navigate to <https://crm.iamproperty.com/Dashboards/Accounts>

**Morgan& Co Client Account**  
01-02-03 01234567

Balance	£ 321, 340.74	Reconciled	£ 304, 129.56
Unallocated Funds	£ 29, 441.07	Unreconciled	£ 17, 211.18

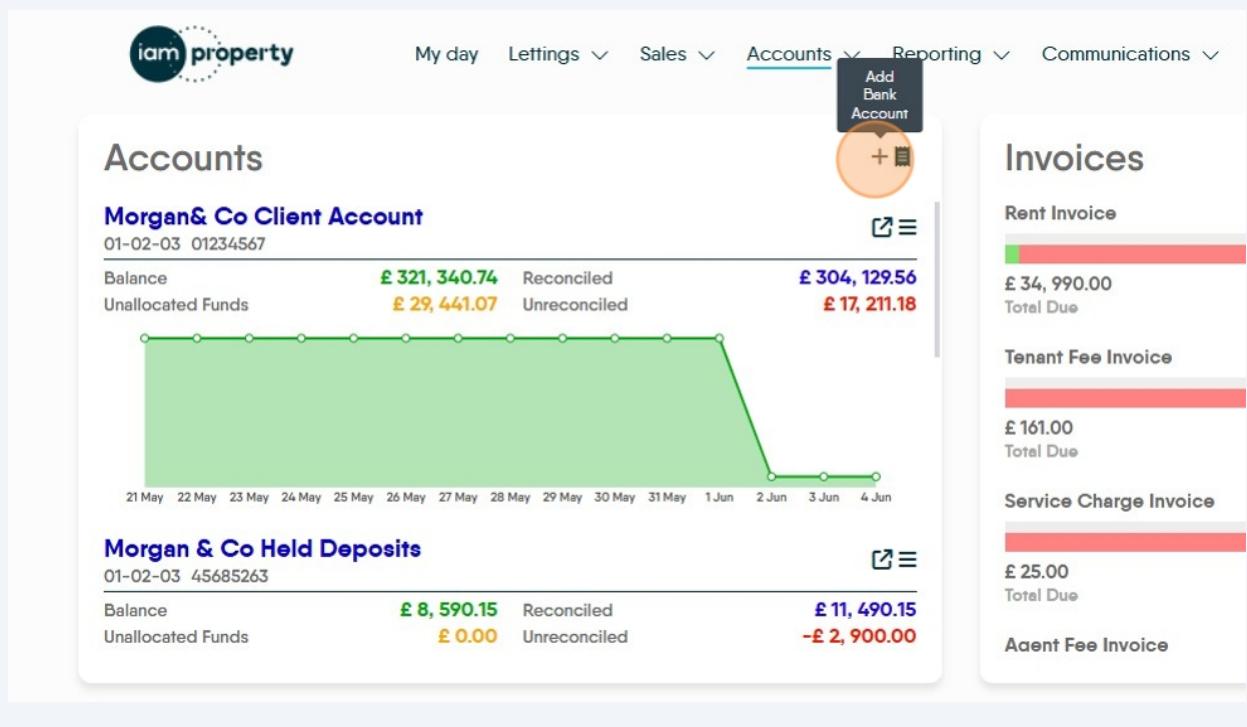
**Morgan & Co Held Deposits**  
01-02-03 45685263

Balance	£ 8, 590.15	Reconciled	£ 11, 490.15
Unallocated Funds	£ 0.00	Unreconciled	-£ 2, 900.00

**Invoices**

- Rent Invoice: £ 34, 990.00 Total Due
- Tenant Fee Invoice: £ 161.00 Total Due
- Service Charge Invoice: £ 25.00 Total Due
- Agent Fee Invoice

2 Click here.



**Accounts**

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21 May 22 May 23 May 24 May 25 May 26 May 27 May 28 May 29 May 30 May 31 May 1 Jun 2 Jun 3 Jun 4 Jun

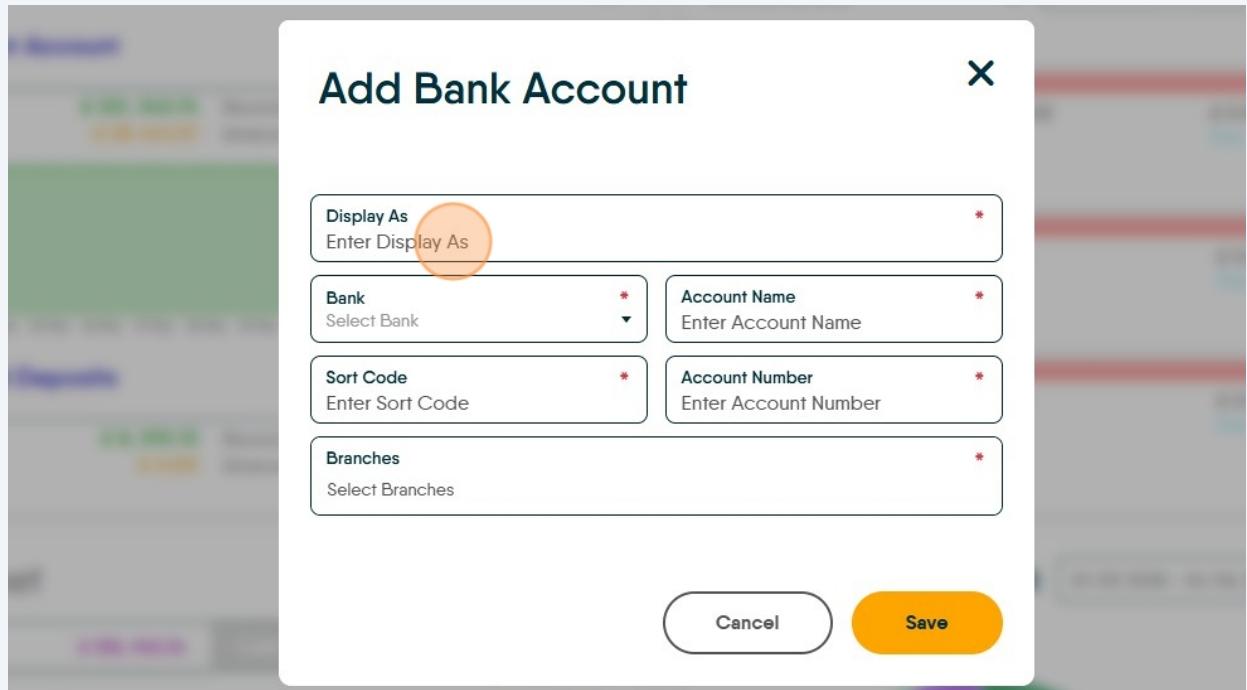
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**Invoices**

- Rent Invoice  
£ 34, 990.00  
Total Due
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£ 161.00  
Total Due
- Service Charge Invoice  
£ 25.00  
Total Due
- Agent Fee Invoice

3 Click the "Display As" field and add the name of your Bank Account or the name you wish to see in the CRM Accounts screen.

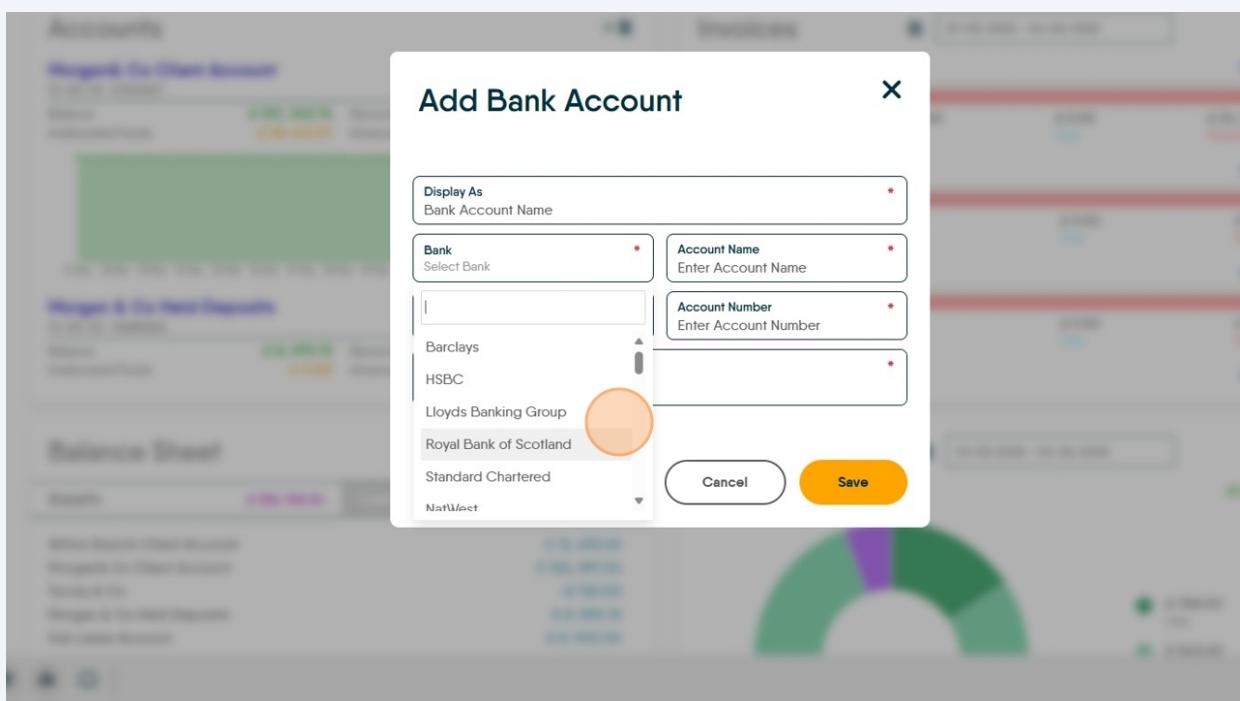
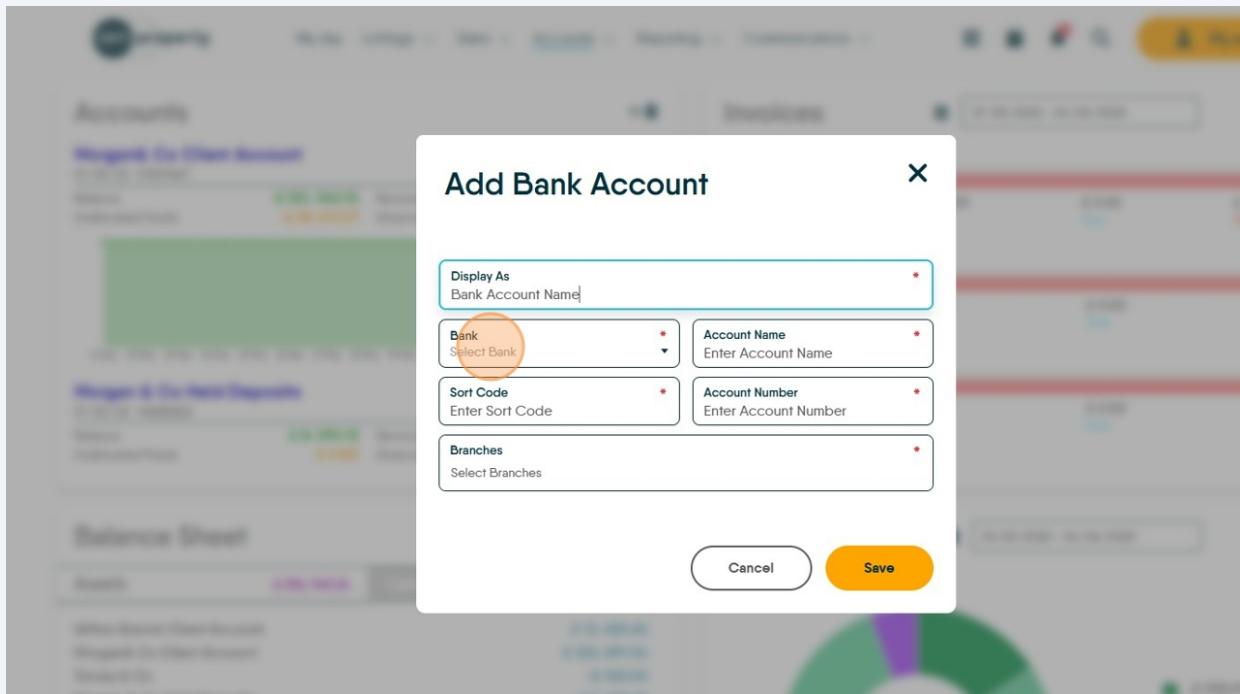


**Add Bank Account**

Display As Enter Display As	*		
Bank Select Bank	*	Account Name Enter Account Name	*
Sort Code Enter Sort Code	*	Account Number Enter Account Number	*
Branches Select Branches	*		

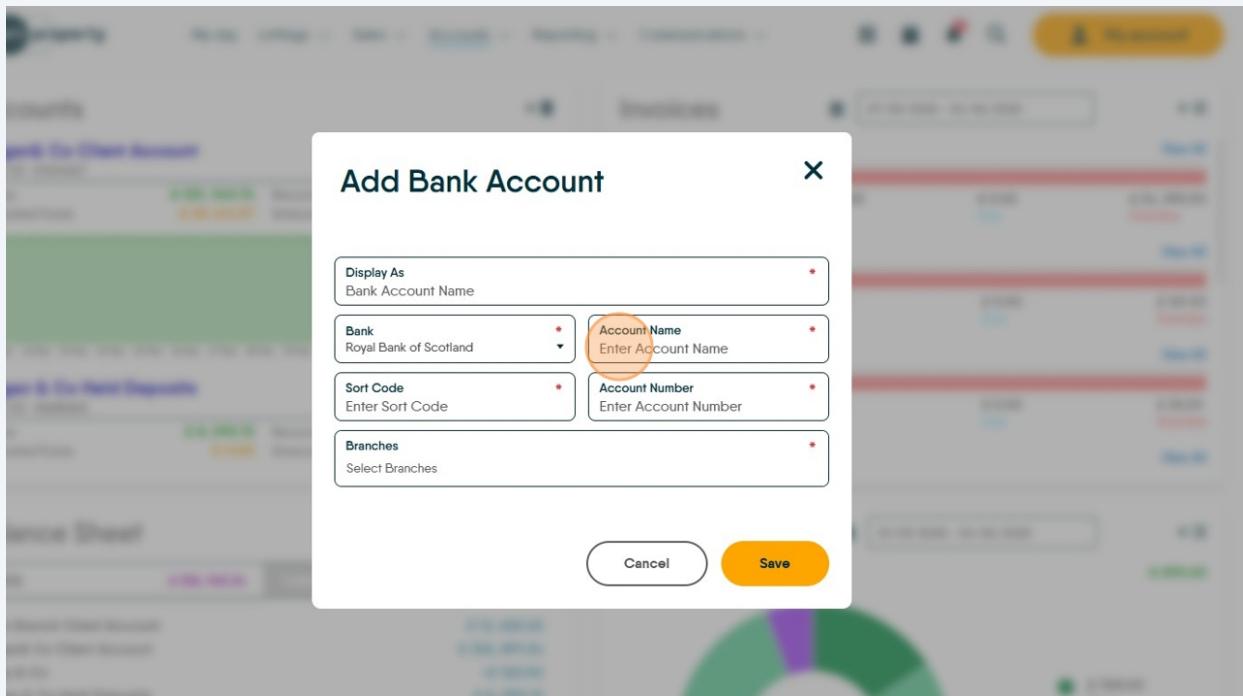
Cancel Save

4 Click "Select Bank" select your bank from the drop down menu

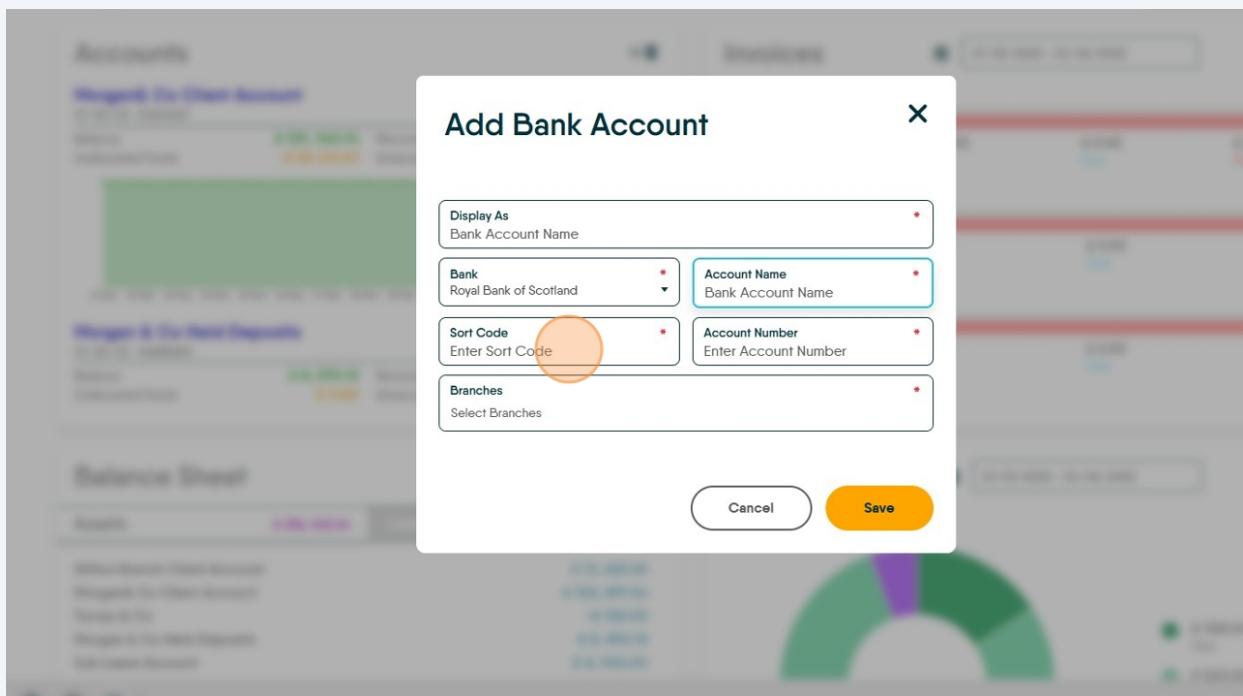


Tip! If your Bank is not in the list it can be added in the Accounts Lookup section of Configuration.

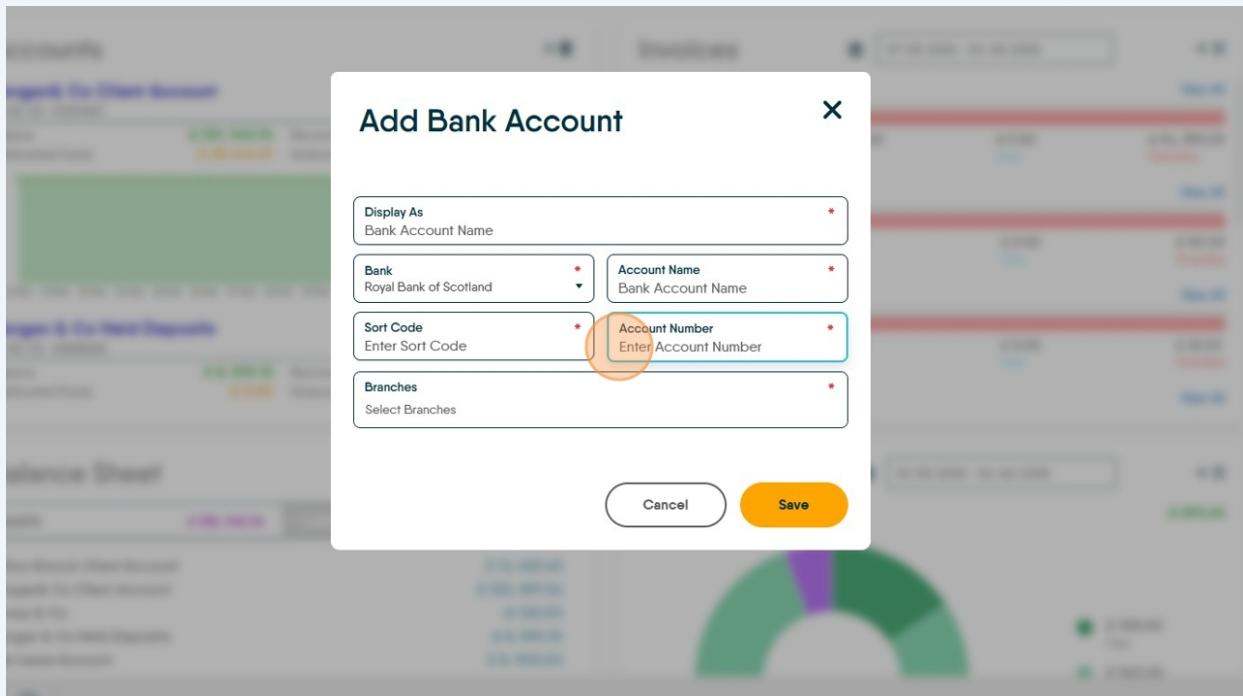
5 Click the "Account Name" field and add the name of your bank account.



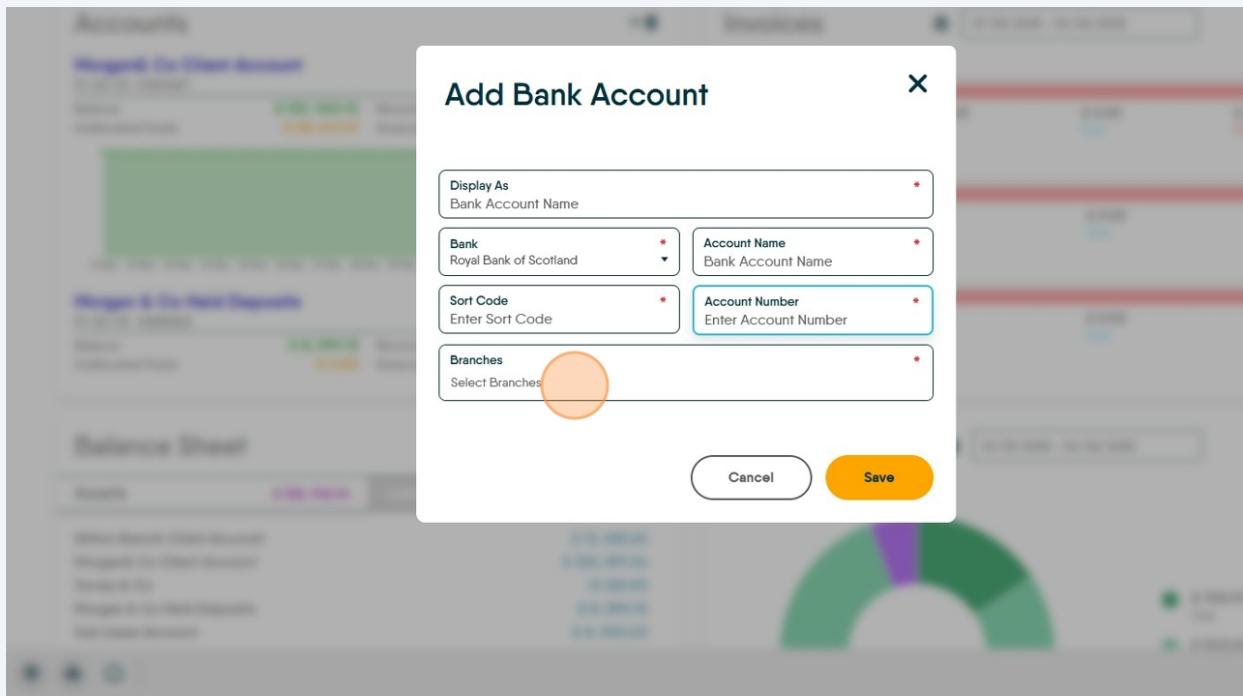
6 Click the "Sort Code" field and add the Bank account sort code



7 Click the "Account Number" field add the Bank Account number

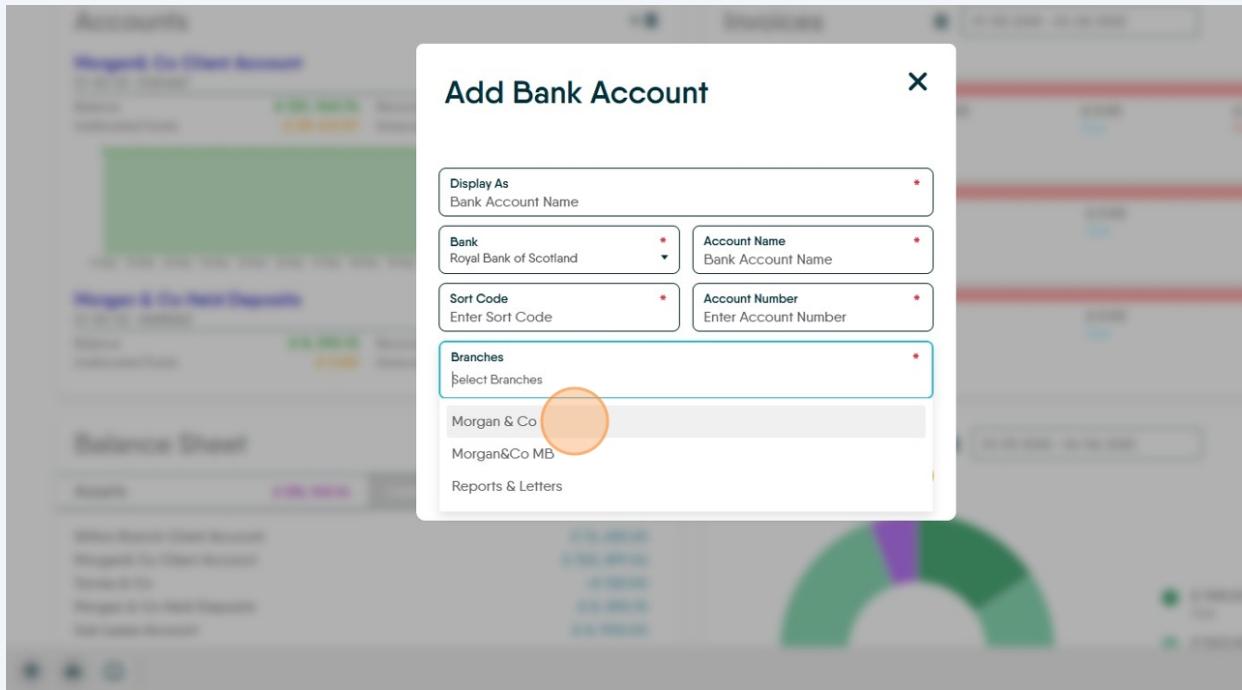


8 Click here and set the Branches of your agency that this account relates to.



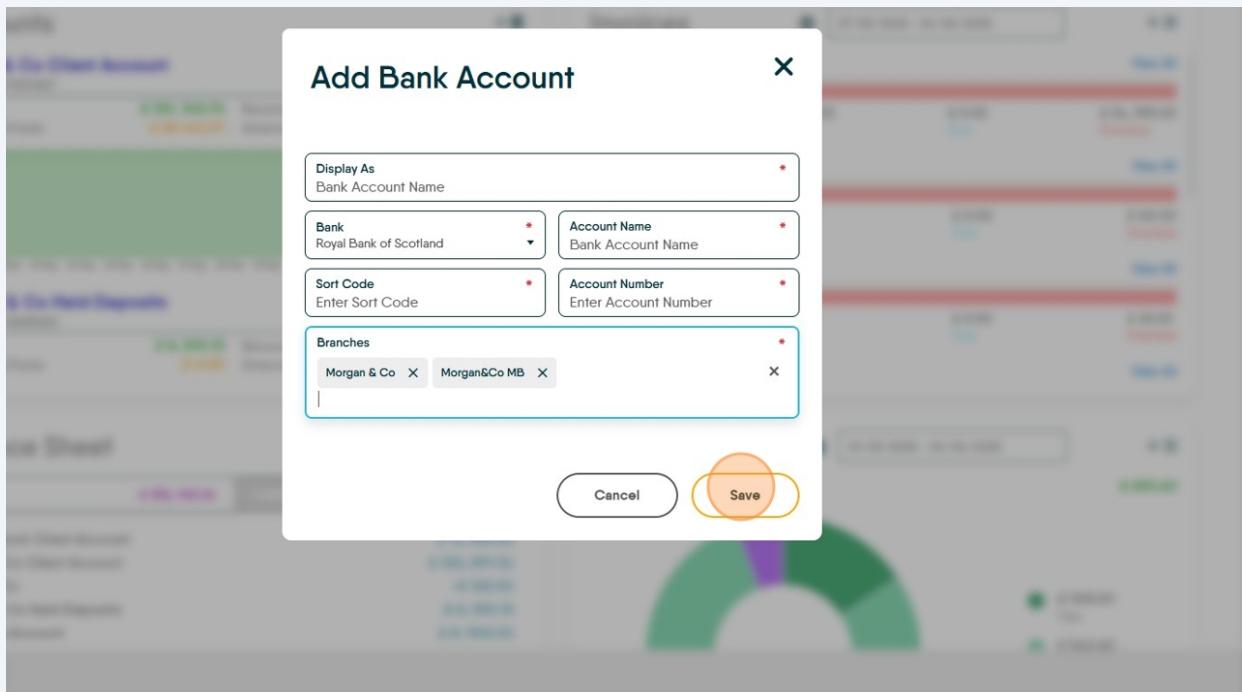
9

Click and select from the drop down menu. This menu only shows the branches that are currently active on YOUR login, to see other branches of your agency click the 'Bento' menu at the top of the screen and select 'Active Branches'



10

Click "Save"



## 11 The new account will show in the Accounts menu.

## 12 Click here.