

Create an account

Create a financial account

Version 7.18



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PRODUCTS: [BANK CUSTOMER JOURNEY](#) [LENDING](#) [BANK SALES](#)

The [*Financial accounts*] section is used to store information about the bank accounts of your customers. Here, you can update and retrieve any important data about a bank account, including its number, customer's name, the current status of the account.

To add a bank account:

1. Open the [Financial accounts] section and click [New financial account].
2. On the opened card setup page, specify the general information about the account:

Account number	Unique financial account number. The field is required.
Contract	The contract for which the financial account was opened. The field is required.
Customer	An individual or legal entity whose account this is. The field is required.
Product	Name of the banking product that is connected to the financial account. The field is non-editable and is populated automatically with the product specified in the contract. The field is required.

3. On the [General information] tab, specify the main bank account information:

Type	Account type, for example, "Deposit", "Card", "Credit". The field is required.
Currency	The currency of the account. The field is required.
Balance	Actual financial account balance.
Branch	Name of the branch or office in which a financial account is opened. Fields lookups contain the lists of legal entities of the "Our bank" type.
Office	

4. Populate the following fields on the [Status] detail on the [General information] tab.

Opened on	Dates on which the current financial account was opened and activated.
Activated on	
Status	Status of the current financial account, for example, "Active", "Blocked", "Closed". By default, the "Active" value is set. The field is required.

5. If necessary, add the [cards](#) that are connected to this bank account to the [Cards] detail.
6. On the [Attachments and notes] tab, add more information about the bank account, as well as attachments and links to the web resources related to the bank account.
7. Click [Save].

As a result, a new financial account record will be added to Creatio.