

Description

Extension creates new entity 'Bank' and adds extra fields to 'Account'.

Installation

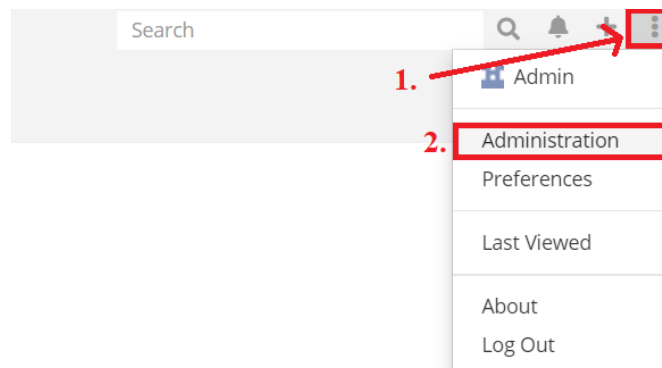
In order to install EspoCRM extension:

1. Login as an administrator.
2. Go to Administration > Extensions.
3. Upload your extension package (zip file).
4. Click Install button.





You can find more information here: <https://docs.espocrm.com/administration/extensions/>

Setting up an Account layout

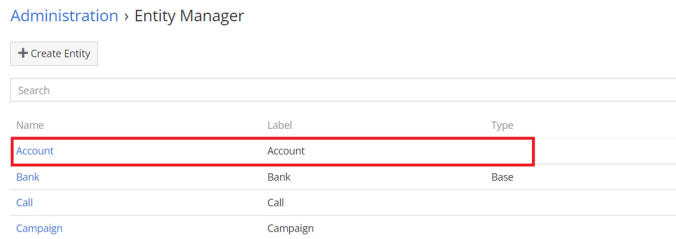
1. Go to the administrator panel.



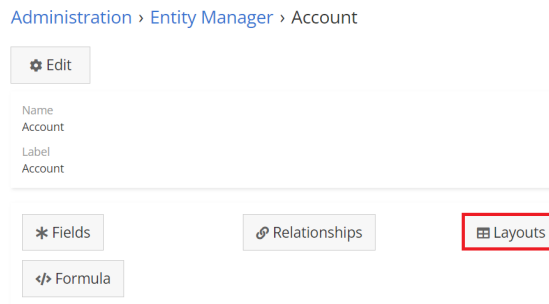
2. Go to the Entity Manager section.

Customization	
 Entity Manager	Create and edit custom entities. Manage fields and relationships.
 Layout Manager	Customize layouts (list, detail, edit, search, mass update).
 Label Manager	Customize application labels.
 Template Manager	Customize message templates.

3. Click on Account entity.

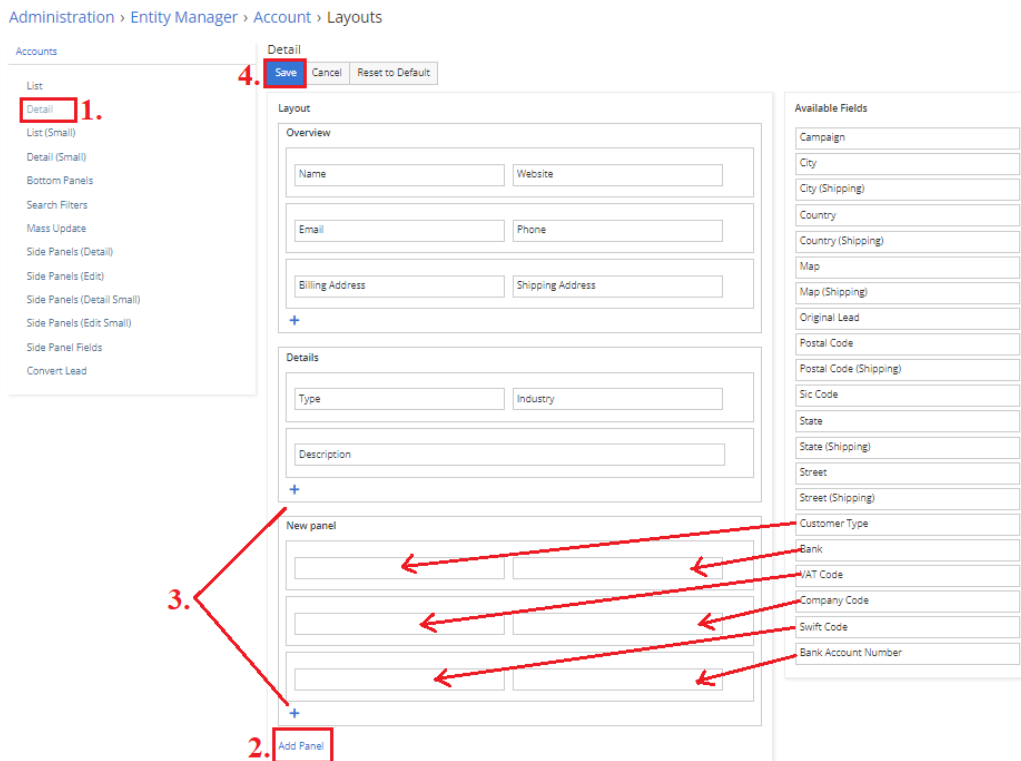


4. Click on Layouts button.



5. Click on detail tab and on Add Panel button.

6. Drag and drop Customer Type, Bank, VAT Code, Company Code, Swift Code, Bank Account Number fields into empty spaces. Save it.





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Bank Entity

1. Navigate to Bank and press + Create Bank.

Banks

+ Create Bank

All ▾ 🔍 ...

2. Fill in the form with requested data. Save it.

[Banks](#) > create

Save Cancel ...

Overview

Name *

Bank Code

Description

Assigned User *

Admin



Teams

Select

