Mobile - Manage My Bank Accounts

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Permissions

You will require an Access Role with the following permissions:

- Bank Accounts

> We'll explain how to add a new bank account for expense reimbursements as well as how to manage existing bank accounts.

Adding a Bank Account

1. Tap the **Navigation Menu** 🔵 and then tap **My Profile**.
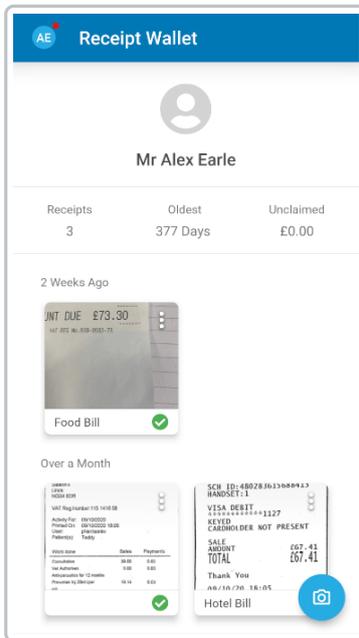
2. Within the 'My Details' section, tap**My Bank Accounts**. This will display a list of your bank accounts.
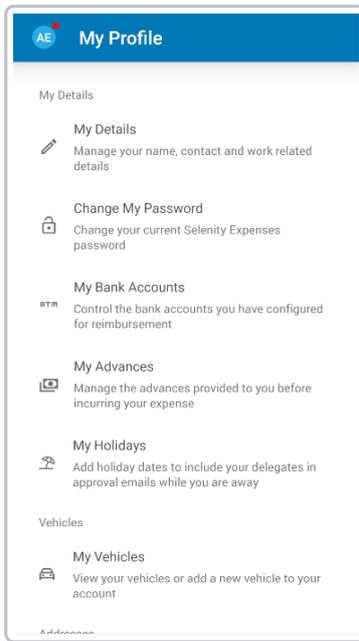
3. Tap ⊕ .

4. Complete the following fields:

Field	Description
Account Name	Enter the name of the account.
Account Number	Enter the account number. This should consist of 7/8 numbers.
Sort Code	Enter the account sort code. This should consist of 6 numbers.
Account Type	Select the bank account type.
Reference	Enter a reference for the account. This will help you differentiate between multiple accounts.
Currency	Select the currency for this bank account.
Country	Select the country that this bank account is located in.
IBAN	For non-UK accounts, enter an international bank account number.
Swift Code	For non-UK accounts, enter the international bank identifier.

> **Note:** A validation service is used to ensure invalid UK account numbers and sort codes cannot be entered. Upon entering an invalid account number or sort code, you will not be able to save the bank account until the details are corrected.

5. Tap SAVE to store your bank account.

Manage Bank Accounts

- Tap an account to view or edit the associated details.

- Within **My Bank Accounts**, tap the menu ⋮ and then tap **Archive** or **Delete**.
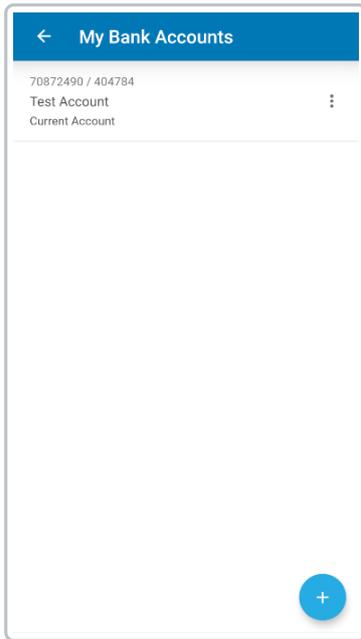
Note: You will only be able to delete bank accounts which have not been used on an expense. Any bank account can be archived/unarchived.