



Payment Method

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Overview

Payment Methods allow you to set up different means of accepting payment from customers.

To get started, select **Payment Methods** from the Settings menu.



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Payment Methods

Create a Payment Method

To create a Payment Method, click the **Create Payment Method** button in the upper left-hand side of the screen.



The Create Payment Method drawer will appear. Give your Payment Method a name and assign it a Payment Type, then click **Save** to close the drawer and create your Payment Method.

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Edit a Payment Method

To edit an existing Payment Method, first select the Payment Method from the list on the left-hand side of the Payment Method screen.



Once you've selected the Payment Method you want to edit, make your changes in the information fields on the right-hand side of the screen.



When you've finished making your changes, click **Save**.

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See it in Action

Payment Methods are used when creating [new payments](#) in the Payments tab of a sales document.



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