

<u>Knowledgebase</u> > <u>Settings</u> > <u>Payment Method</u>

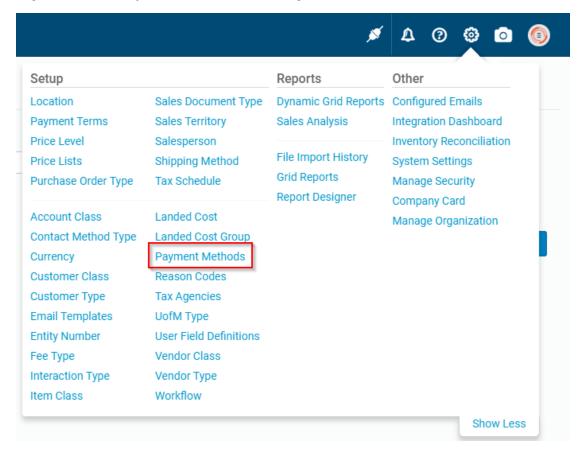
Payment Method

Cavallo Support - 2025-08-06 - Settings

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.



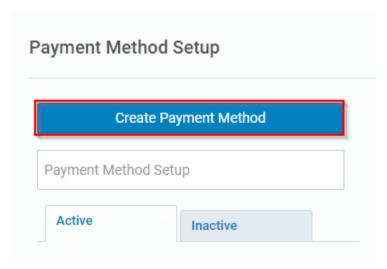
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Payment Methods

Create a Payment Method

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

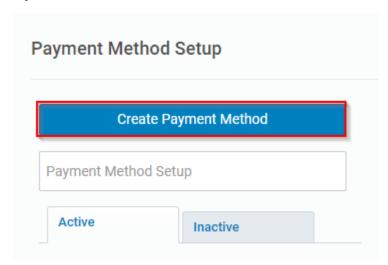


The Create Payment Method drawer will appear. Give your Payment Method a name and assign it a Payment Type, then click **Save** to close the drawer and create your Payment Method.

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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.

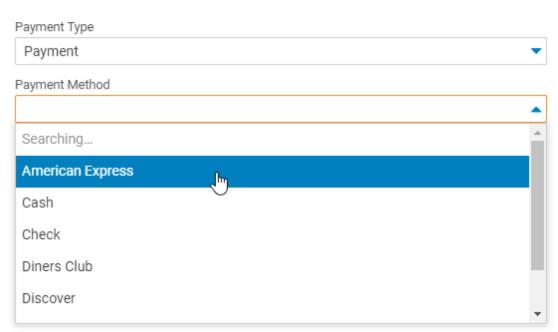
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See it in Action

Payment Methods are used when creating new payments in the Payments tab of a sales document.

New Payment





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