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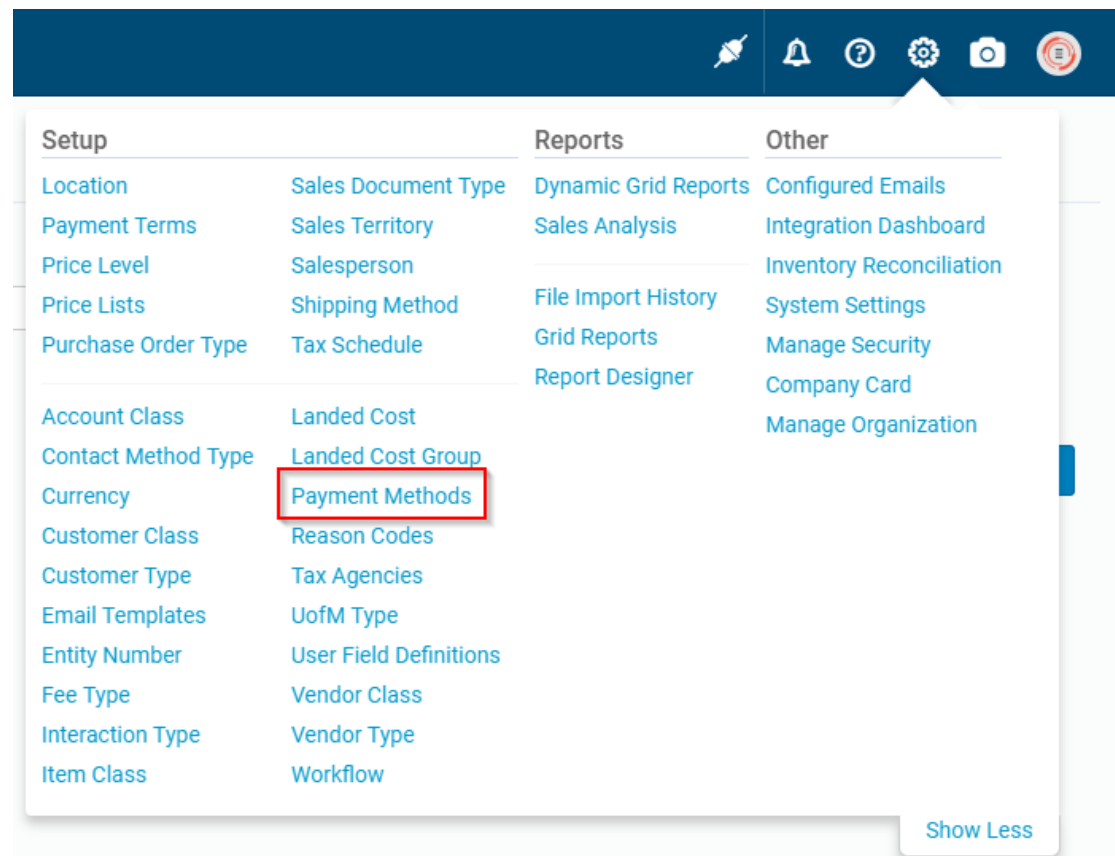
Payment Method

Megan De Freitas - 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.



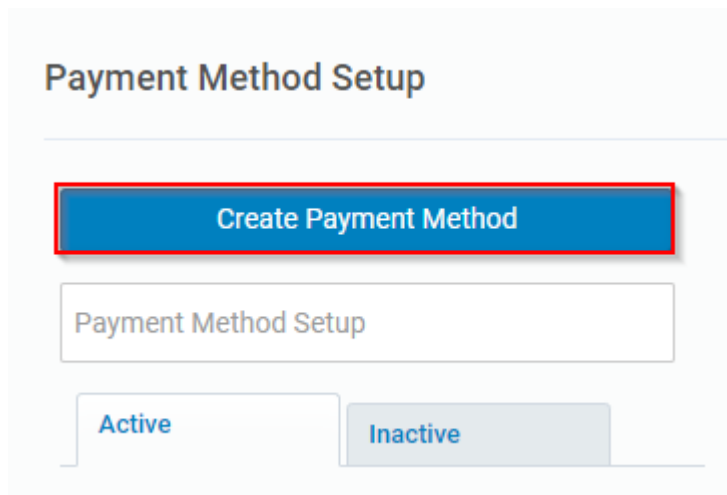
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Payment Methods

Create a Payment Method

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



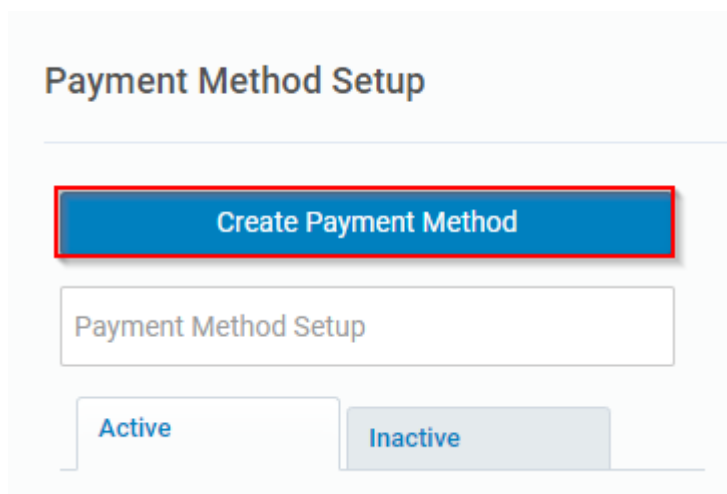
The screenshot shows the 'Payment Method Setup' interface. At the top is the title 'Payment Method Setup'. Below it is a blue button with the text 'Create Payment Method', which is highlighted with a red rectangular border. Underneath the button is a text input field containing the placeholder text 'Payment Method Setup'. At the bottom of the screen are two toggle buttons: 'Active' (highlighted in blue) and 'Inactive' (in grey).

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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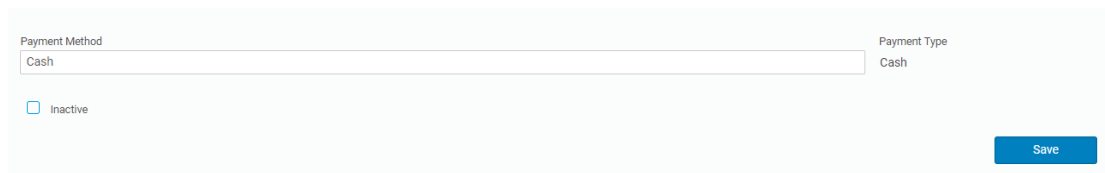
Edit a Payment Method

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



This screenshot is identical to the one above, showing the 'Payment Method Setup' screen with the 'Create Payment Method' button highlighted by a red border.

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.



The screenshot shows the 'Payment Method Setup' interface with the 'Cash' payment method selected. The 'Payment Method' field contains the text 'Cash'. The 'Payment Type' field also contains the text 'Cash'. There is an 'Inactive' checkbox which is currently unchecked. A blue 'Save' button is located at the bottom right 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



Payment Type

Payment



Payment Method



Searching...

American Express



Cash

Check

Diners Club

Discover

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