



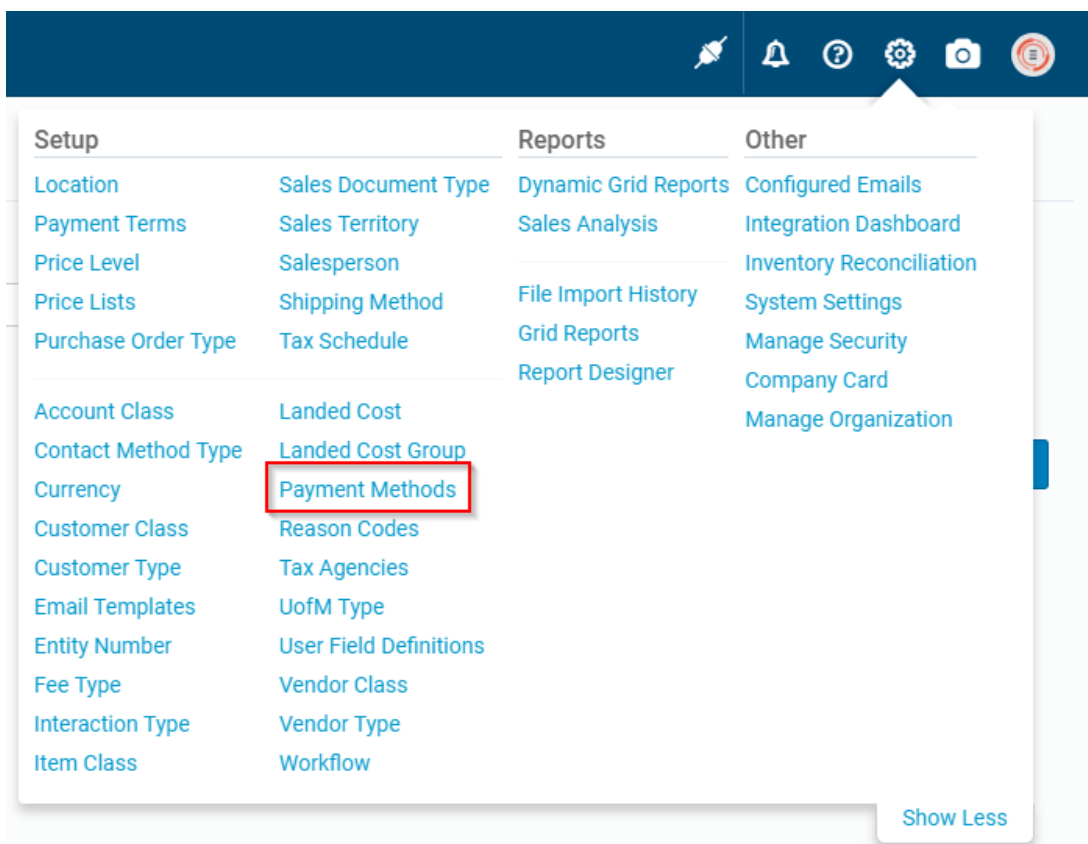
Payment Method

Megan De Freitas - 2024-12-02 - 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.



Navigation Menu

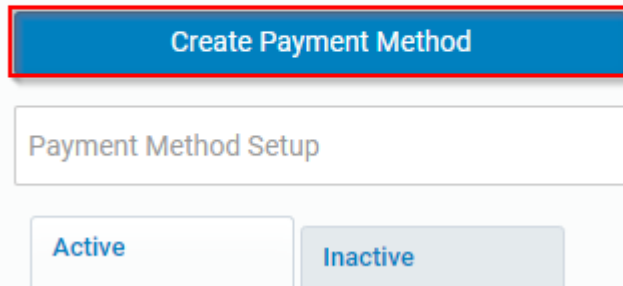
- [Payment Methods](#)
 - [Create a Payment Method](#)
 - [Edit a Payment Method](#)
- [See it in Action](#)

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.

Payment Method Setup



The screenshot shows the 'Payment Method Setup' interface. At the top, there is a blue button labeled 'Create Payment Method' which is highlighted with a red border. Below this button is a text input field containing the placeholder text 'Payment Method Setup'. At the bottom of the screen, there are two radio buttons: 'Active' (which is selected) and 'Inactive'.

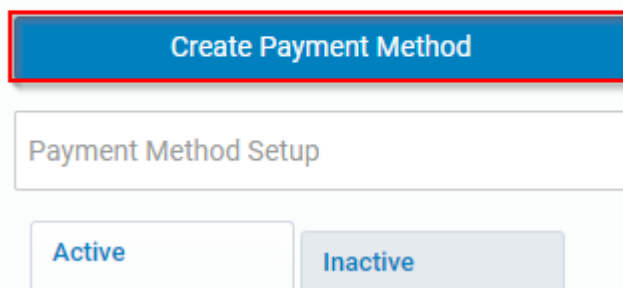
The Create Payment Method drawer will appear. Give your Payment Method a name and assign it a Payment Type, then click **Save** to close the drawer and create your Payment Method.

[Back to Navigation Menu](#)

Edit a Payment Method

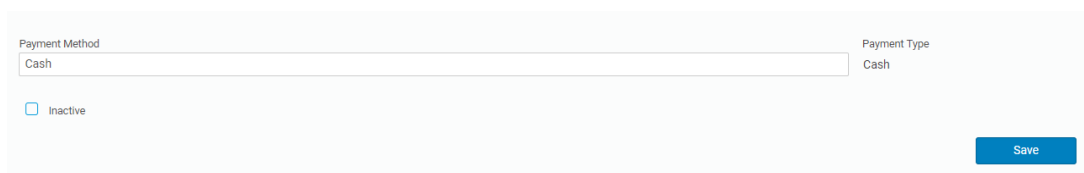
To edit an existing Payment Method, first select the Payment Method from the list on the left-hand side of the Payment Method screen.

Payment Method Setup



This screenshot is identical to the one above, showing the 'Payment Method Setup' interface with the 'Create Payment Method' button highlighted in red.

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' form. The 'Payment Method' field is a text input containing 'Cash'. The 'Payment Type' field is a text input containing 'Cash'. Below these fields, there is a radio button labeled 'Inactive' which is selected. A blue 'Save' button is located in the bottom right corner of the form.

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

[Back to Navigation Menu](#)

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

[Back to Navigation Menu](#)