

Payment methods

September 11, 2026

Payment methods

Payment methods

Payment methods are named, coded entries that you maintain in the Payment Methods reference list.

Use this page when you need to add, change, or remove an entry.

If you need to...	Go to...
Check the list and its fields	Find the Payment Methods list
Read the fields and dialog controls	Understand the list and form
Add or edit an entry	Add or edit a payment method
Delete, filter, import, or export	Handle delete, filter, import, and export branches
Resolve a save, delete, or refresh message	When maintenance goes wrong
Continue to a sibling reference list	After maintaining payment methods
Maintain delivery terms	Delivery Terms
Maintain units	Units
Maintain guarantee types	Guarantee Types
Maintain lost reasons	Lost Reasons
Maintain regret reasons	Regret Reasons
Maintain cancellation reasons	Cancellation Reasons
Maintain order cancellation reasons	Order Cancellation Reasons

Before you start

The Payment Methods list is a permission-controlled reference list: the actions available to you

depend on the permissions returned for your account.

Prerequisites

Before you begin	What to have ready
Add an entry	The Name and Code you want to enter.
Edit an entry	The payment-method row you want to change.
Delete an entry	The row you want to remove and permission to delete it.
Export the list	Permission to export it.
Import entries	Permission to import them.
Show the filter row	Access to the Settings menu.

The entry form is where you enter **Name** and **Code**. An action column is the action area at the end of a

row. The **New** action depends on add permission; the edit action in an existing row's action column

depends on edit permission; the delete action in a row's action column depends on delete permission;

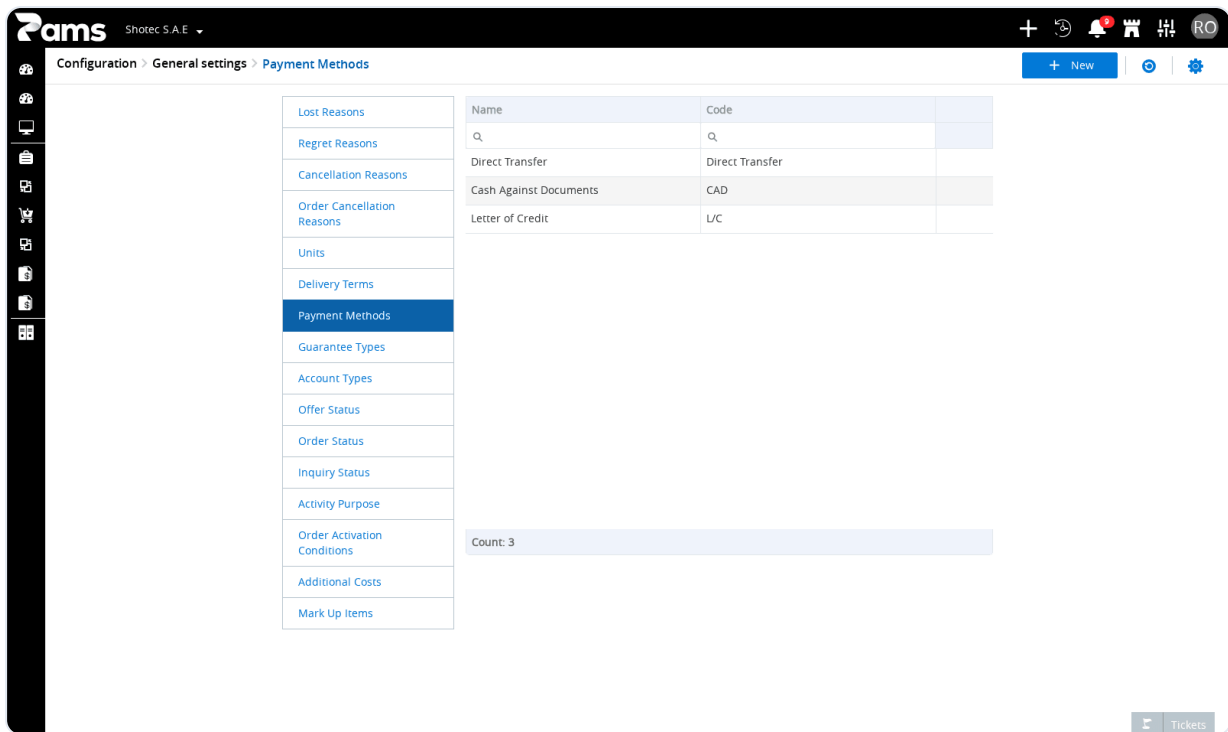
and the

Export and **Import** items depend on their respective permissions.

Find the Payment Methods list

The Payment Methods list is the screen where you locate an existing row or start a new entry.

The list contains three rows under the **Name** and **Code** columns.



Prerequisites

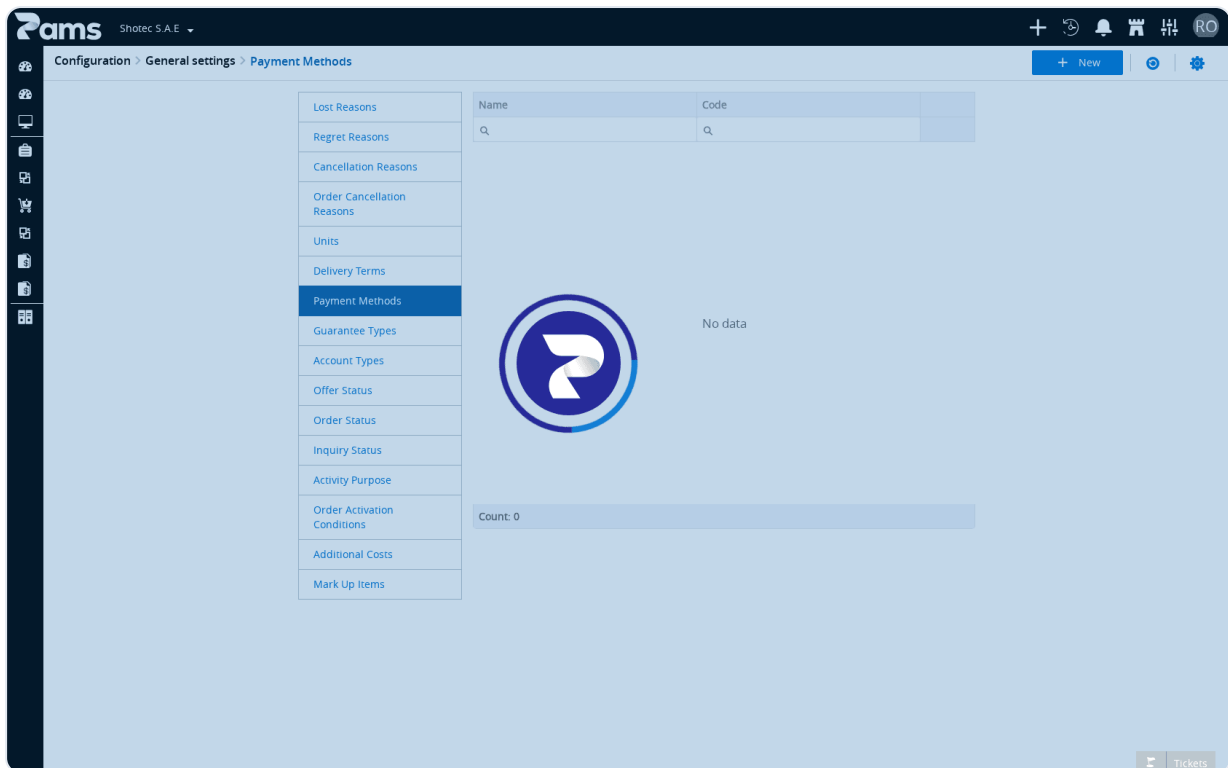
- You know the **Name** or **Code** you want to find.

Steps

- Open **Payment Methods** in the configuration navigation.
- Confirm that the page heading reads **Payment Methods**.
- Identify rows under the **Name** and **Code** columns.
- Choose how to continue.

If you want to...	Do this
Add an entry	Select New .
Edit an entry	Select an existing row.

- Select the icon whose title is **Refresh** to refresh the list.
- Select the icon whose title is **Settings** to open list options.



Result: You are on the Payment Methods list and can choose a row or **New**.

Understand the list and form

The list presents the payment-method values as **Name** and **Code** columns; the entry dialog

presents those same two values as required text fields.

The list also contains a hidden payment-method identifier and an action column. The identifier is

used by the system but is not an entry value for you to edit. The filter row is controlled by

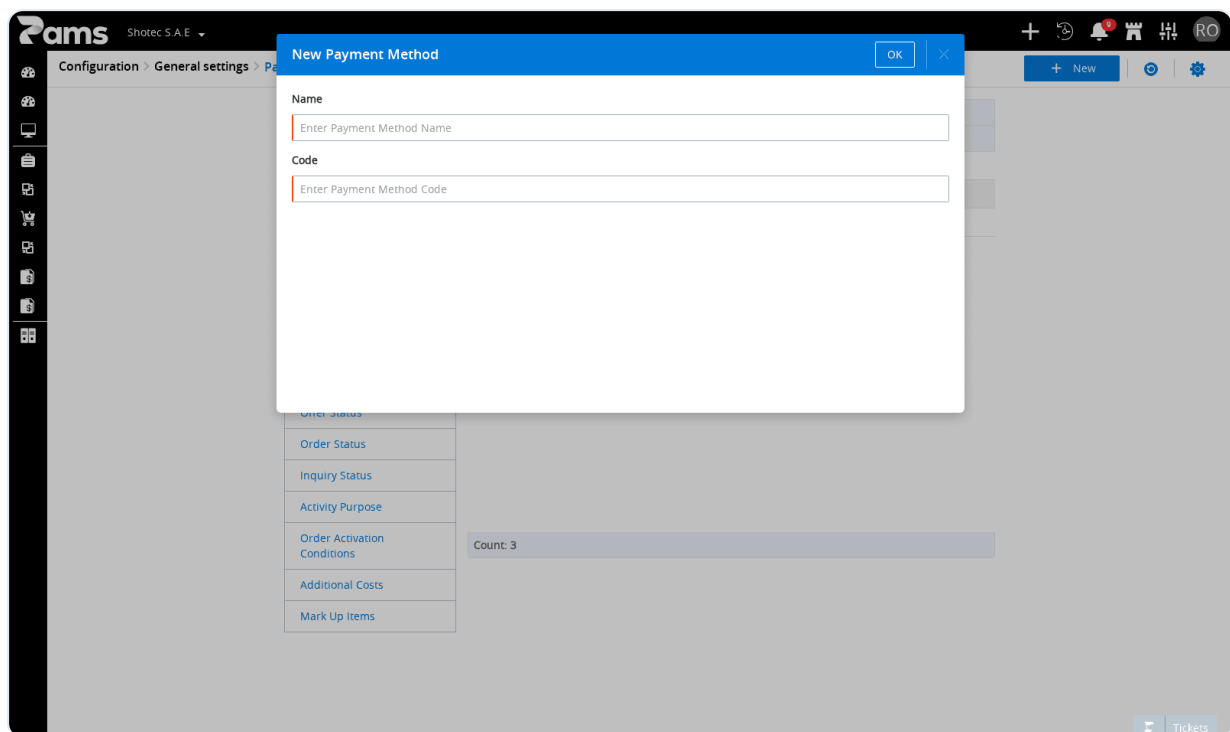
Filter Row in the **Settings** menu. The form appears when a payment method is selected.

What you see	What it is for
Name	The payment method's name.
Code	The payment method's code.
Filter Row	Shows or hides the grid filter row.
OK	Confirms the open entry dialog.
Table Layout	Header control beside Settings .

What you see	What it is for
PaymentMethodID	A hidden identifier, not an editable value.
Sibling reference-list labels	Destinations for other configuration lists, including Units , Delivery Terms , Lost Reasons , Regret Reasons , Cancellation Reasons , and Order Cancellation Reasons .

When the import branch is opened, the shared popup contains a file control. The **Import** menu item is permission-controlled.

To edit an existing row, use the action control at the end of that row. The visible columns are **Name** and **Code**. No additional column chooser is available.



Add or edit a payment method

Use the form to maintain the **Name** and **Code** values for an entry.

Prerequisites

- You have permission to add or edit payment methods.
- For an edit, you have an existing row selected.

Steps

1. Choose the action that matches your task.

Task	Action
Add an entry	Select New .
Edit an entry	In an existing row, select the edit control in the action column.

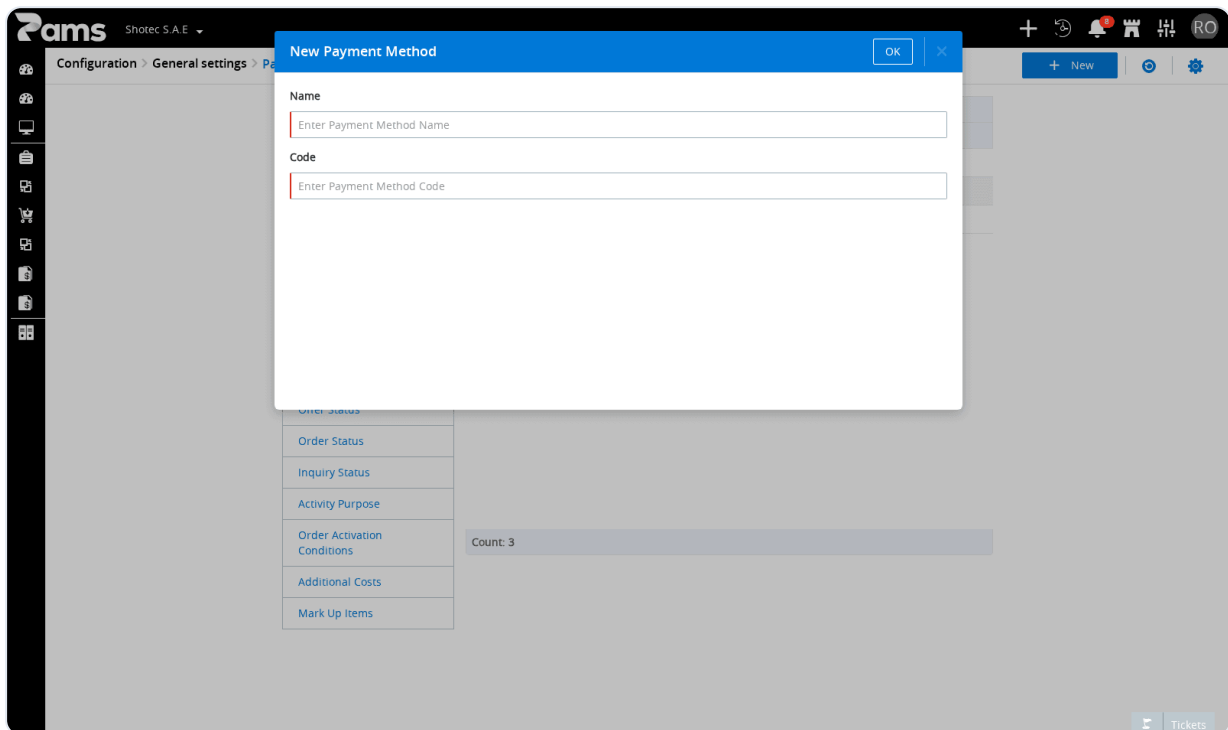
2. Confirm that the **Name** and **Code** fields are present in the **New Payment Method** dialog.

3. Enter the payment method name in **Name**.

4. Enter the payment method code in **Code**.

5. Confirm the dialog, then choose the outcome you want.

If you want to...	Select...
Submit the entry	OK , then Save .
Close without saving	OK , then Cancel .



Result: The entry form closes after the save action, and a successful save produces the message

Data saved Successfully .

Handle delete, filter, import, and export branches

These branches change what you can do from the list: deletion acts on a selected row, filtering changes the list view, and export opens a separate list-format dialog.

Delete an entry

Prerequisites

- You have permission to delete payment methods.
- You have identified the row to remove.

Steps

1. Open the row's delete menu.
2. Read the confirmation message `Are you sure you want to delete this item?`.
3. Choose the result you want.

If you want to...	Select...
Keep the row	Cancel
Remove the row	Delete

Result: The row remains when you select **Cancel**; a successful deletion produces `Data Deleted Successfully`.

Filter or export the list

Prerequisites

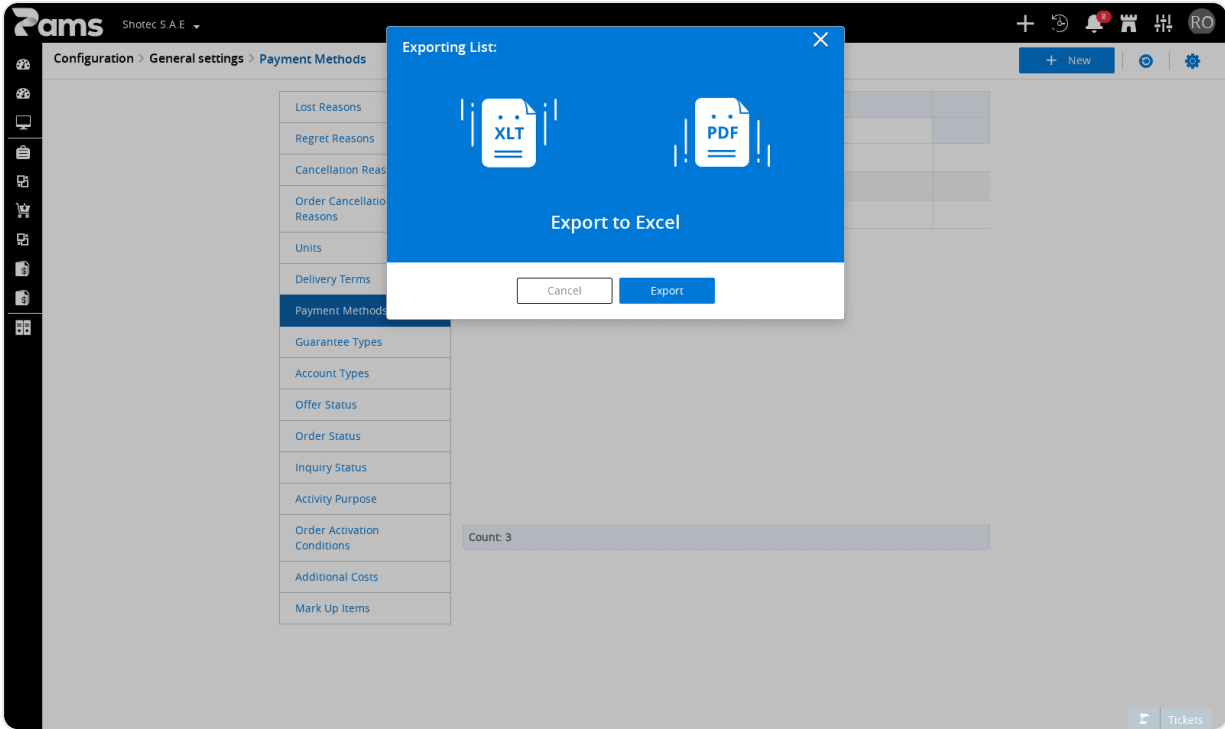
- You are on the Payment Methods list.
- You have permission for the action you choose.

Steps

1. Select **Settings**.
2. Choose one option from this table.

If you want to...	Select...	What appears
Show or hide the grid filter row	Filter Row	The filter row changes visibility.
Open the export choices	Export	The Exporting List: dialog opens.
Leave the export dialog	Cancel	The dialog closes.
Run the displayed export choice	Export	The export action runs.

3. In the **Exporting List:** dialog, select **Export to Excel** when that option is displayed.
4. Select **Cancel** to leave the dialog without running the displayed export choice.



Result: The filter row is shown or hidden, or the export dialog closes after you leave it.

The **Import** item is available only when import permission allows it.

When maintenance goes wrong

Use the message text to identify what happened after a list action.

What you see	When it appears	What to do
Data saved Successfully	After a successful save.	Check the list for the maintained entry.
Data Deleted Successfully	After a successful deletion.	Check that the row is no longer in the list.
Updated around a minute ago	When the refresh tooltip calculates about one minute since the last refresh.	Select Refresh when you need the list refreshed.
Updated <minutes> minutes ago	When the refresh tooltip calculates more than one minute since the last refresh.	Select Refresh when you need the list refreshed.

The availability of **New**, edit, delete, **Export**, and **Import** depends on the corresponding

permission. The entry form is available when a payment method is selected. Required markers on

Name and **Code** appear in the opened form.

After maintaining payment methods

The Payment Methods page remains the place to check the list after a maintenance action.

Prerequisites

- You have completed or stopped the action you started.

Steps

1. Select **Refresh** to reload the list.
2. Check the **Name** and **Code** columns for the entry you maintained.
3. Choose the sibling list that matches your next task:

If you need to maintain...	Continue to...
Units	Units
Delivery terms	Delivery Terms
Guarantee types	Guarantee Types
Lost reasons	Lost Reasons
Regret reasons	Regret Reasons
Cancellation reasons	Cancellation Reasons
Order cancellation reasons	Order Cancellation Reasons

Result: The list is refreshed, and you can continue with the next reference-list task.