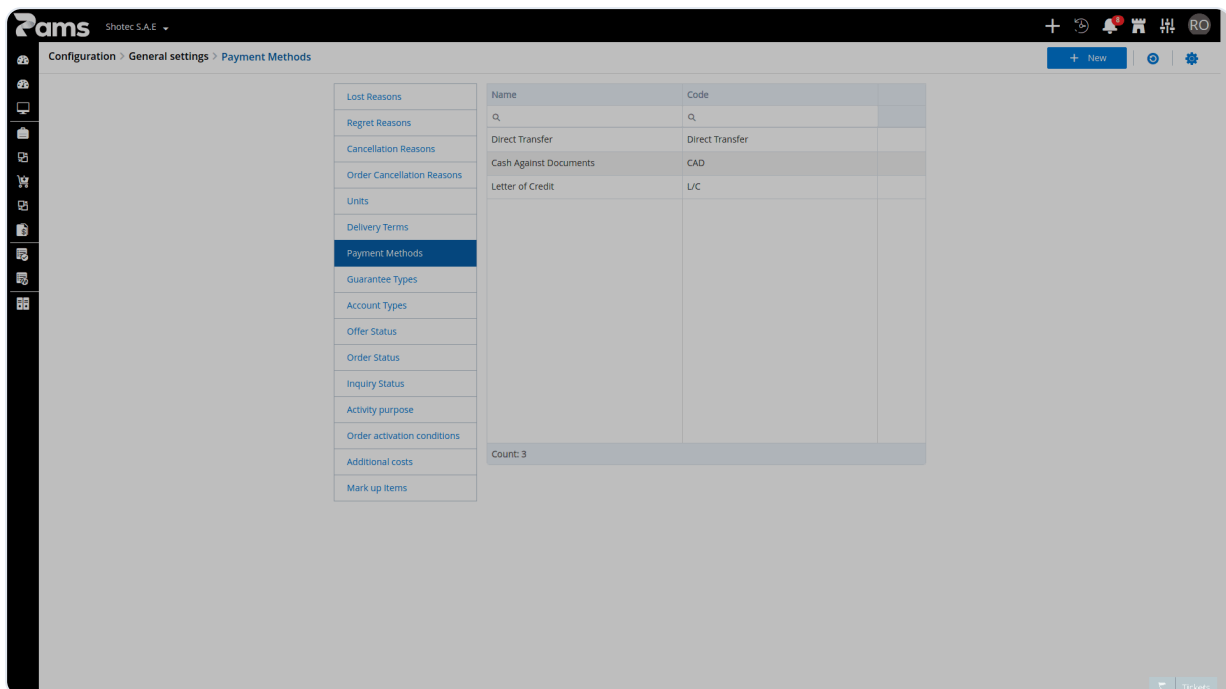


Configure Payment Methods

October 1, 2026

Configure Payment Methods

Administrator Guide > Configuration > General Settings*Payment Methods — Configurations > General Settings > Payment Methods*

Overview

Payment Methods define the payment options available for business transactions. Administrators use the **Payment Methods** configuration page to review the existing payment method records and begin adding a new payment method when required.

Use this page when your organization needs to maintain payment method names and codes, such as direct transfer or cash against documents.

Before you start

You must be signed in to access the **Payment Methods** configuration page.

Steps

1. In the navigation pane, select **Configurations**, select **General Settings**, and then select **Payment Methods**.
2. Review the payment method records in the list. Use the **Name** and **Code** columns to identify each configured payment method.
3. To begin configuring an additional payment method, select **New**.
4. Enter the required payment method information in the new record, using the available configuration fields, and complete the record according to your organization's payment method requirements.

Note: Payment method records are identified in the list by their **Name** and **Code**.

Tip: Use a consistent code convention so that payment methods can be distinguished easily in configuration lists.

Troubleshooting

- You cannot open the **Payment Methods** page → A signed-in user is required → Sign in and then open **Configurations > General Settings > Payment Methods**.
- You need to add another payment method → The required record does not yet exist in the list → Select **New** to begin creating a payment method record.

Result

The Payment Methods configuration list is available for reviewing existing payment method names and codes and for starting a new payment method record.

Related pages

- [Configure Order Status](#)
- [Configure Regret Reasons](#)
- **Configuration — Learning Path**
- [Configure Account Types](#)
- [Configure Activity Purpose](#)
- [Configure Cancellation Reasons](#)

- [Configure Cost Items](#)
- [Configure Delivery Terms](#)
- [Configure Guarantee Types](#)
- [Configure 2 Factor Authentication](#)
- [Configure Account Managers](#)
- [Configure Attachment Categories](#)
- [Configure Branches](#)
- [Configure Flags](#)
- [Configure Frequent Currencies](#)