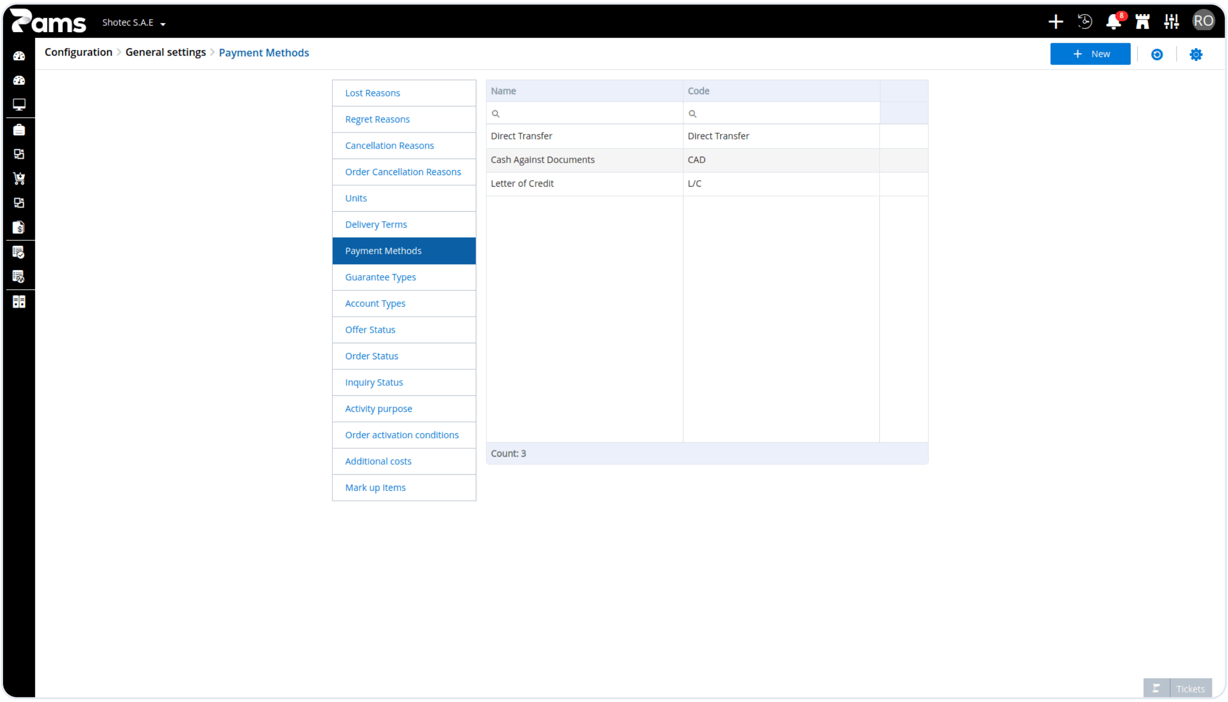
Payment Methods

August 8, 2026

Payment Methods

Applications › Configurations › General Settings



Payment Methods — Configurations › General Settings › Payment Methods

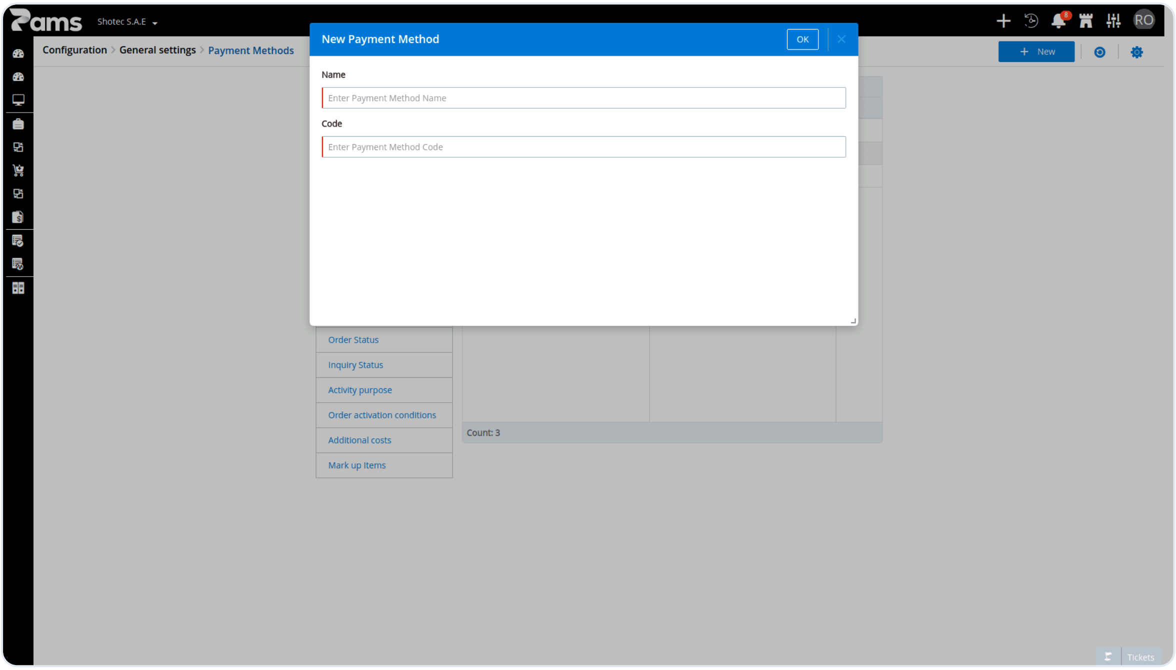
Overview

Payment Methods is the list used to review and maintain the payment method records available in the business. Sales, purchasing, warehouse, and finance users can use this page to find an existing method, begin a new method entry, export the displayed list, or attach supporting files. Use it when you need to verify the name or code of a payment method before processing related business transactions.

> **Note:** The list displays payment method records by **Name** and **Code**.

Workflow

1. Open **Payment Methods** from **Configurations > General Settings > Payment Methods**. Review the available payment method records in the list.



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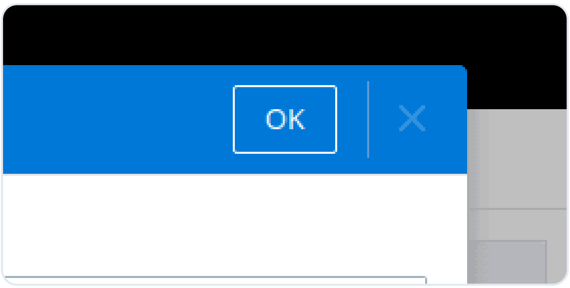
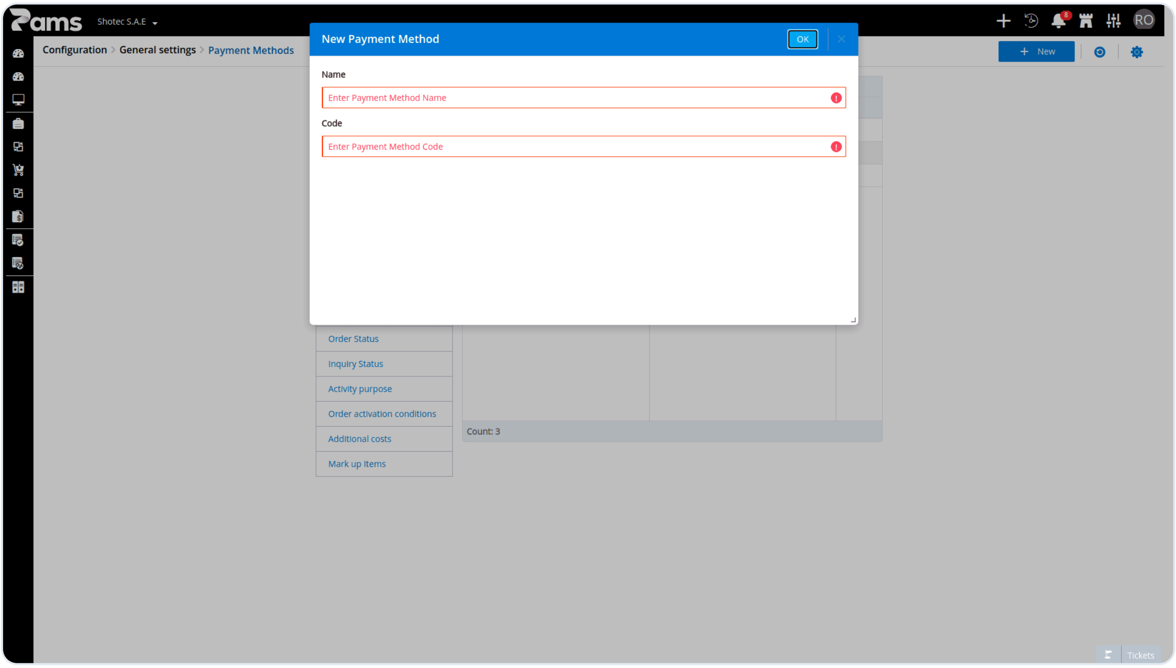


2. Decide whether you need an existing record or a new one:

   - To locate an existing method, enter a name or code in **Search**, then select **Apply filter** to update the displayed list.
   - To begin entering a payment method that is not already listed, select **New**.



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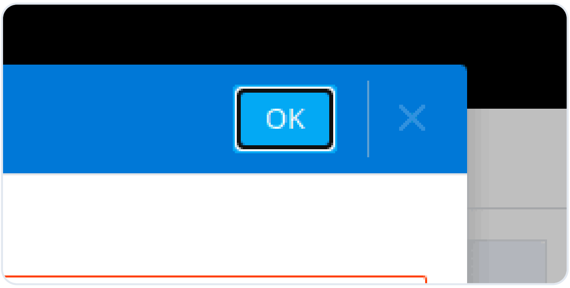

> **Tip:** Search by the most distinctive part of the payment method name or code to reduce the number of displayed records.

3. When you have started a new entry, complete the information presented in the entry window. Select **Ok** when it is available to confirm the entry, or select **Cancel** to leave without proceeding.
4. Decide whether you need to distribute or retain supporting information:
   - Select **Export** to export the currently displayed payment method list.
   - Select **Attach**, or drop a file in **or Drop a file here**, to add a supporting file.
   - Select **Tickets** when you need to access the available ticket action for the payment method page.

> **Warning:** Apply the required search criteria before selecting **Export** so that the exported content reflects the records you intend to use.

Examples

A finance user needs to verify the payment method for a transaction that must be paid against shipping documents.

1. Open **Payment Methods** from **Configurations > General Settings > Payment Methods**.
2. Enter `CAD` in **Search** and select **Apply filter**.
3. Confirm that the filtered list shows the payment method with the name **Cash Against Documents** and the code **CAD**.
4. If a copy of the filtered result is required for review, select **Export**.
5. If supporting documentation must be retained with the page, select **Attach** or use **or Drop a file here** to add the file.

Tips

> **Tip:** Use **Cancel** when you decide not to continue with a new payment method entry.

> **Note:** Use **Export** after filtering when you require a focused list rather than all displayed payment methods.

Troubleshooting

- **Symptom:** The required payment method is not visible.
  Likely cause: The list is not filtered for the relevant name or code.
  Fix: Enter the available name or code in **Search** and select **Apply filter**.
- **Symptom:** The list remains too broad after searching.
  Likely cause: The search text is too general.
  Fix: Search using a more specific name or code value, then select **Apply filter** again.

- **Symptom:** A file was not added as intended.
  Likely cause: The attachment action was cancelled or the file was not dropped in the upload area.
  Fix: Select **Attach** again, or place the file in **or Drop a file here**.

Related pages

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- Getting Started with Configurations
- Configurations — Learning Path
- 2 Factor Authentication
- Account Managers
- Dynamic Validation
- Manage Demo Data
- Base Of Inspection
- Inspection Checklist