1. Payment Methods

Create, edit, show, or hide the tender types employees use at checkout.

- How to create a payment method
- How to edit, hide, or retire a payment method

How to create a payment method

Create a payment method for each tender type employees must be able to select at checkout, such as cash, credit card, financing, or another accepted method.

Create the method

1. Open **Settings > Payment Methods**.
2. Select **Create** or **New Payment Method**.
3. Enter a clear name with at least four characters.
4. Choose whether the method should be visible or hidden.
5. Save the payment method.
6. Confirm it appears where employees select payment at checkout.

Naming tips

- Use the name employees already use for the tender.
- Avoid duplicate or nearly identical names.
- Do not use a card-processor name unless that is how the tender should be reported.

How to edit, hide, or retire a payment method

Keep old payment methods available for historical reporting while preventing employees from selecting them for new transactions.

Edit a payment method

1. Open **Settings > Payment Methods**.
2. Select the method to edit.
3. Correct the name or visibility setting.
4. Save the changes.

Hide an old method

Set the payment method to **Hidden** when it should no longer appear at checkout. Hiding is usually safer than deleting because past transactions can continue to reference the original method.

Before changing a method used by an integration, confirm that the processor or accounting workflow does not depend on its existing name.