Create a Payment Type

How to Create a Payment Type in Muhasib ERP

Overview

This guide will help you create a payment method and associate it with the intended payment account.

The method becomes selectable and may auto-select its account when the company setting is enabled.

Who can do this

You need access to Payment Type Add and Payment Account visibility.

Before you start

Create the payment account and define the method's business meaning and checking process.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Muhasib Financials/setup → Payment Types.

Create a Payment Type

Step 1: Choose New Record

Step 2: Enter Short and Long Description

Step 3: Select the associated Payment Account

Step 4: Save

Step 5: Test the type in a disposable eligible transaction

Test the type in a disposable allowed transaction.

Check your work

Confirm transaction payment, account activity/statement, payment-channel report, and GL use the intended account.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- If account selection is absent, check Pay Account permission.
- Do not map multiple methods to an account without checking policy.

Related guides

- Create a Payment Account
- Configure This Workstation's POS Experience
- Review the Payment Channel Report

What to do next

> **Create a Payment Account**.

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