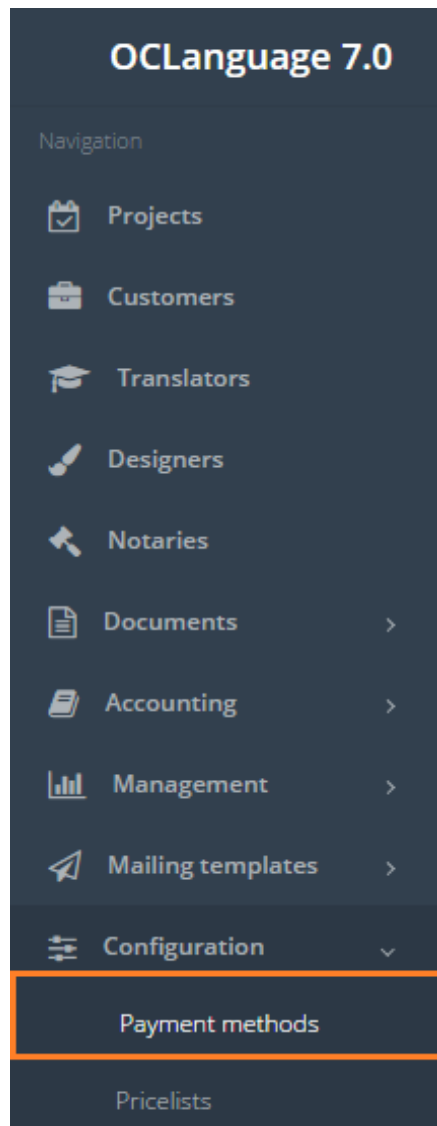


3.7. Payment methods

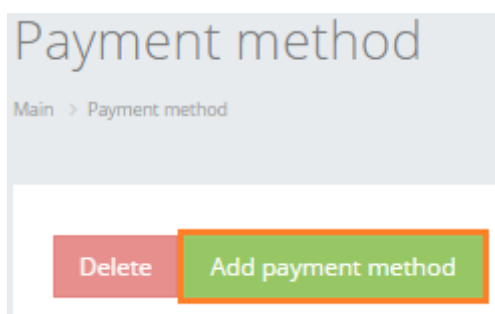
To open the system configuration click “Configuration” -> “Payment methods” on the Navigation pane.



Payment methods table data contains all payment services that a translation agency works with. Payment methods are revealed in the following system sections:

- Translator’s data
- Customer payment data
- Project data (under Tasks section)
- Payment section
- Income report.

To add a new payment method click “New payment method”.



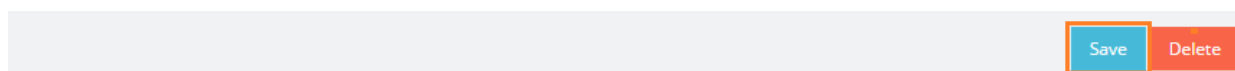
In the table below you can see the description of fields related to payment methods.

Field	Description
Name	Name of payment method
Type	Choose payment type between “Bank” and “Electronic money”
Requisite fields (name)	Bank Identifier Code
Correspondent account	Specify the name of requisite field (for example, SWIFT code, WMID etc.) once this is saved, all of these fields will appear in the translator’s data.
Additional information	Fields for additional information to be stored in payment method details, for example: Name: home site Value: www.hsbc.com
Fields details	Field setup for translators’ payment data, for example, field name might be Card account, Ledger account, SWIFT and once this is saved, all of these fields will appear in the translator’s data.
The order of display	Priority of revealing payment methods. 1 — highest priority (reserves 1 st place in the list of payment methods)
Status	Check this box to include a payment method in the translator’s data.

After fields are filled, click “Save”.

Priority

Status



In general view of the payment methods you can see all methods of payment. The column “Order of display” shows the priority of revealing all payment methods, one after another.

Payment method

Main > Payment method

Delete Add payment method

☰ Search

<input type="checkbox"/>	Name	Type	Priority	Status
<input type="checkbox"/>	Bank account	Bank transfer	1	Active
<input type="checkbox"/>	Moneybookers	Electronic money	1	Active
<input type="checkbox"/>	Webmoney	Electronic money	1	Active
<input type="checkbox"/>	Yandex Money	Electronic money	1	Active

Click on the text to browse the Payment method data.

Payment method

Main > Payment method

Delete Add payment method

☰ Search

<input type="checkbox"/>	Name	Type	Priority	Status
<input type="checkbox"/>	Bank account	Bank transfer	1	Active

In order to remove a particular Payment method, check the box next to the payment method that you want to delete and click “Delete”.

Payment method

Main > Payment method

Delete Add payment method

☰ Search

<input type="checkbox"/>	Name	Type	Priority	Status
<input checked="" type="checkbox"/>	Bank account	Bank transfer	1	Active
<input type="checkbox"/>	Moneybookers	Electronic money	1	Active

User can filter the data in the Payment methods database by using 3 methods:

1. Type letters or numbers in “Search” field and click “Enter”

Payment method

Main > Payment method

Delete Add payment method

☰ PayPal

<input type="checkbox"/>	Name	Type	Priority	Status
<input type="checkbox"/>	PayPal	Electronic money	1	Active

The system searches payment methods according to the payment method name only.

! Please note that data filter can be removed by deleting the text in the “Search” field and clicking “Enter”.


2. Filter data by sorting data from A to Z and vice versa by clicking on the column name.

Payment method

Main > Payment method

Delete Add payment method

<input type="checkbox"/> Name ▲	Type	Priority	Status
<input type="checkbox"/> Bank account	Bank transfer	1	Active
<input type="checkbox"/> Moneybookers	Electronic money	1	Active
<input type="checkbox"/> PayPal	Electronic money	1	Active

3. Review the columns that you want to see in the Payment methods table. To add or remove a particular column from the table, simply click  and select the columns that you want (or do not want) to view in the Payment methods database. This feature is especially relevant, if there are big databases with many columns and/or relatively small monitor/tablet/smartphone screen.

! Please note that the system will save these settings for upcoming user sessions.

Payment method

Main > Payment method

Delete Add payment method

<input type="checkbox"/> Name	Type	Status
<input type="checkbox"/> Bank account	Bank transfer	Active
<input type="checkbox"/> Moneybookers	Electronic money	Active

Name
 Type
 Priority
 Status