Setting default payment accounts for payment methods

Payment Accounts · https://spos.pk/docs/setting-default-payment-accounts-for-payment-methods/

A default payment account links each payment method, such as cash, bank transfer or JazzCash, to the account where the money should be recorded. Setting defaults means every sale and purchase payment goes to the right account automatically, and your cash and bank balances stay correct.

Setting default payment accounts for payment methods

1. Go to the payment accounts or payment methods settings in Smart POS and open the list of payment methods.
2. For each payment method, choose the payment account it should use by default, for example the cash drawer for cash and your bank account for bank transfers.
3. Check that every payment method you use at the till has a default account set, including card and mobile wallet methods.
4. Save the settings, then record a test sale with each payment method to confirm the payment lands in the right account.
5. Check the payment account balances afterwards to confirm the test payments were recorded in the accounts you chose.

Tip: Review your default payment accounts whenever you open a new bank account or add a payment method, so no payment is ever recorded against the wrong account.