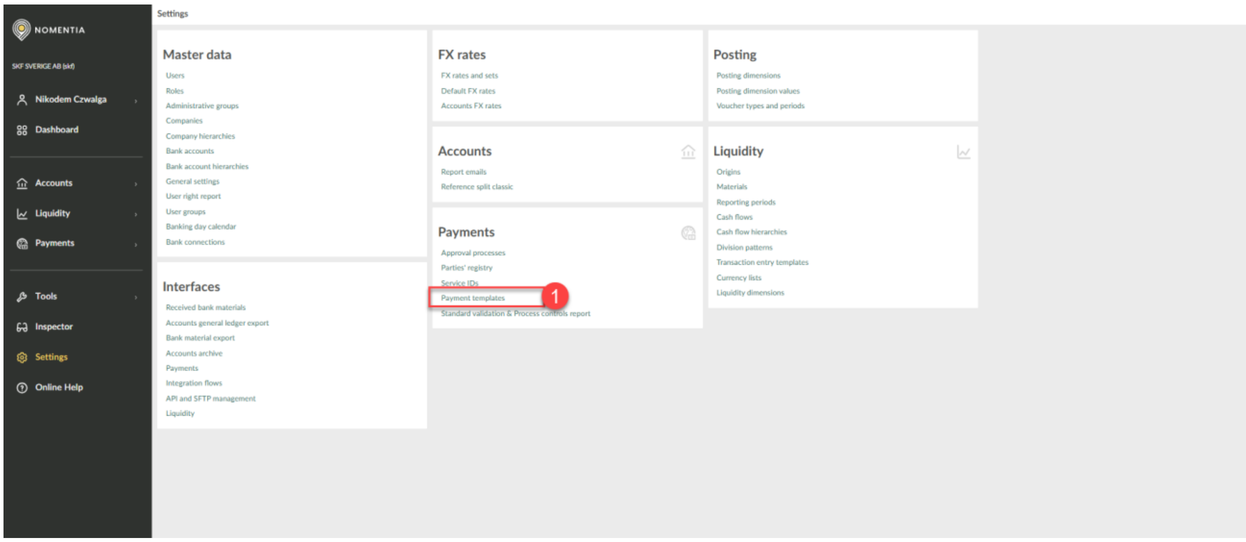
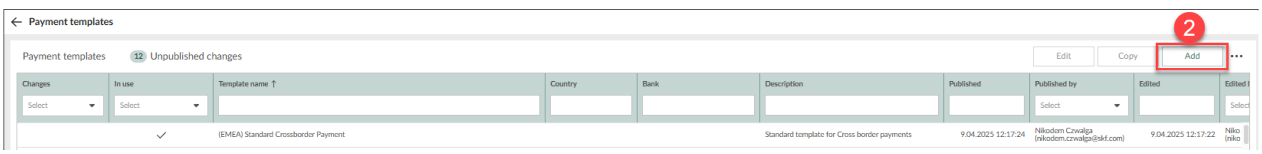
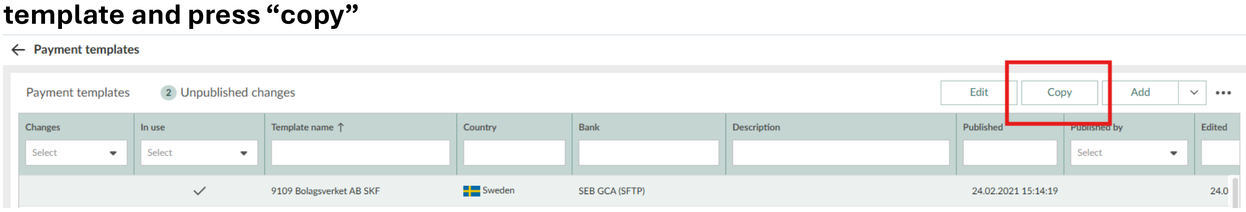
How to create a payment template

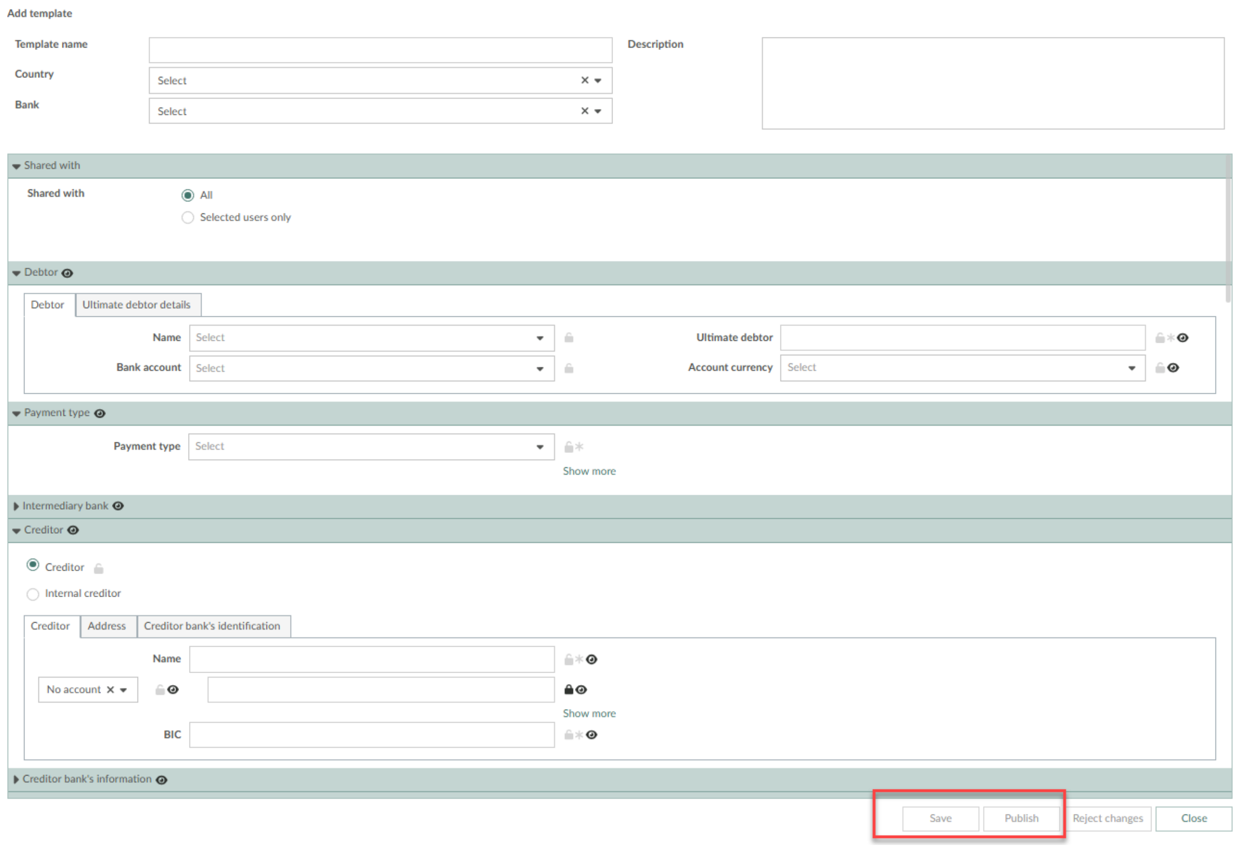
To create a payment template, go to “settings” and then to “payment templates”.





To start creating a payment template press on “add” and start filing the template. There is also a way to copy existing template and use it as a base for a new one. To do so, open the existing template and press “copy”





You can see small icons next to each section or to each information in the payment template like an eye icon, or the key lock icon.

Eye icon – if you don't want someone who use the template later to see a specific field while creating manual payment, then you can press on the eye it will then become a crossed eye icon

Key lock – if you want to lock some of the information in the payment, like the debtor bank account (to always be i.e. the main bank account); someone who will create a manual payment from that template won't be able to change that information.

Important thing while creating a manual payment template is to "save" and "publish" the template.