**Payment Types & Credit Card Configuration**

*Choose, manage, and customise how your business accepts payments. moonstride enables you to set up a variety of payment methods and card types to match your operational needs—all in one convenient location.*

**Table of Contents**

1. Introduction
2. Managing Payment Types
   * Viewing & Filtering Payment Types
   * Adding a New Payment Type
   * Editing Payment Types
   * Deleting Payment Types
   * Changing Display Order
3. Managing Credit Card Types
   * Viewing & Filtering Credit Card Types
   * Adding a New Credit Card Type
   * Editing Credit Card Types
   * Deleting Credit Card Types
   * Changing Display Order
4. See Also

**1. Introduction**

moonstride’s payment module lets you define exactly which payment options your team can offer customers—including credit/debit cards, bank transfers, cash, refunds, or cheques. You can also specify card types, linking any required fees or commission settings, for precise control over your payment process.

**2. Managing Payment Types**

**Viewing & Filtering Payment Types**

**Navigation:** Go to **Widgets → Widget → Payment Type**.

* The Payment Type listing screen displays every method you’ve added.
* Filter your view to see all, only active, or only inactive payment types.
* Adjust the order in which payment types appear using the "Sort Order" column and **Save Sequence**.

*Insert screenshot here of Payment Type listing screen*

**Adding a New Payment Type**

To add a payment type:

1. Click the **Add** button.
2. Complete the following fields:
   * **Payment Type Name:** The display name for this method (e.g., Card Payment, Bank Transfer, Cheque, Refund).
   * **Code:** A short code for back-office reference.
   * **Description:** Add a brief description for clarity.
   * **Payment Method:** Choose whether it’s a manual collection or linked to a third-party payment gateway.
   * **Is Refund Type:** Tick this box if the type is used for processing refunds.
   * **Require Card Selection:** Tick if this payment requires choosing a card type (e.g., Visa, Mastercard).
   * **Status:** Set as active or inactive.
3. Click **Save**.

*Insert screenshot here of Add Payment Type form*

**Editing Payment Types**

* Click the **Actions** gear icon next to the payment type you want to update.
* Select **Edit**, make any necessary changes, and click **Save**.

**Deleting Payment Types**

* From the listing, click the **Actions** gear icon for the relevant type.
* Click **Delete**.
* Confirm in the alert dialog (OK/Cancel).

**Changing Display Order**

* To set the order in which payment types appear for selection, enter the appropriate number in the **Sort Order** column.
* Click **Save Sequence** (top right) to confirm.

**3. Managing Credit Card Types**

Before you can accept payments by card, specify which card types are permitted—this ensures correct processing, surcharge calculation, and accounting.

**Viewing & Filtering Credit Card Types**

**Navigation:** Go to **Widgets → Widget → Credit Card Type**.

* Review all card types set up in your system.
* Filter to show all, only active, or only inactive card types.
* Adjust display order using the **Sort Order** column and **Save Sequence**.

**Adding a New Credit Card Type**

To add a card type:

1. Click **Add** in the Credit Card Type listing screen.
2. Fill out:
   * **Name:** (e.g., Visa, Mastercard, Amex)
   * **Charge Type:** Set up any default charge or fee type for the card.
   * **Description:** (Optional) Usage notes or restrictions.
   * **Status:** Set as active or inactive.
   * **Applied On:** Choose whether the card charges apply to customer price or agent commission.
3. Click **Save**.

*Insert screenshot here of Add Credit Card Type form*

**Editing Credit Card Types**

* Click the **Actions** gear icon for the type you want to edit.
* Select **Edit**, update any details, and click **Save**.

**Deleting Credit Card Types**

* In the listing, click the **Actions** gear icon for the appropriate type.
* Click **Delete** and confirm your choice in the popup.

**Changing Display Order**

* Enter display numbers in the **Sort Order** column as preferred.
* Click **Save Sequence** to update the order seen at selection.

**4. See Also**

* [Configuring Payment Gateways](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Refunds and Payment Reconciliation](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Booking & Invoice Management](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [User Access and Security on Payment Data](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)

**Summary**

moonstride’s payment type and card configuration features ensure your finance process matches your business rules and customer needs. For advanced usage, such as integrating with payment gateways or applying surcharge rules, see our related articles or contact the support team.