



How to Add Checkbox Option for New Payment Method in Printouts

Overview:

Payment Method helps to identify what type of payment the customer and the company used for collection and payment to supplier respectively.

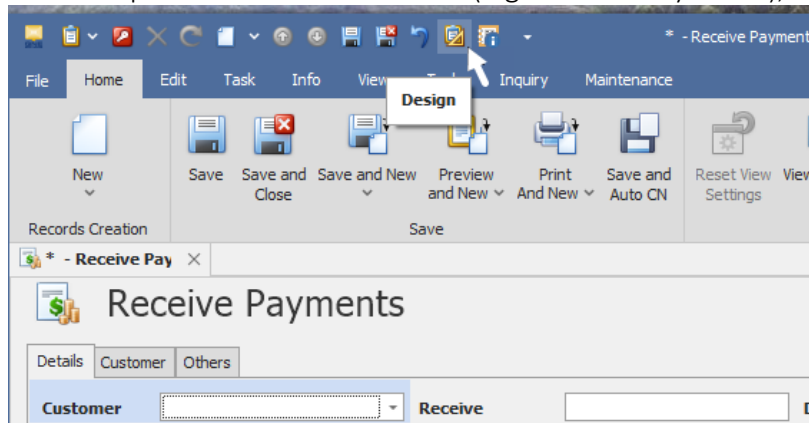
By default, the system only recognizes the switching for Checks and Cash only in Printouts.

Scenario:

To show dynamic changes in payment method upon printout with more than two options.

Procedure:

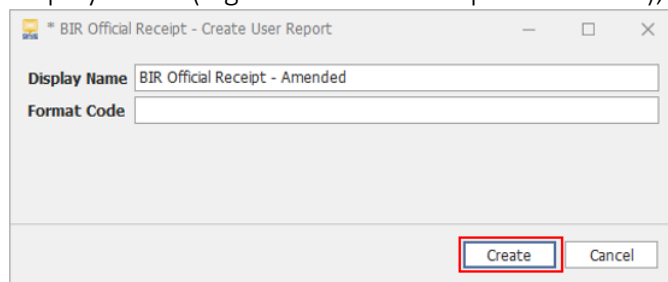
1. On the report or transaction screen (e.g. Receive Payments), click the Design button.



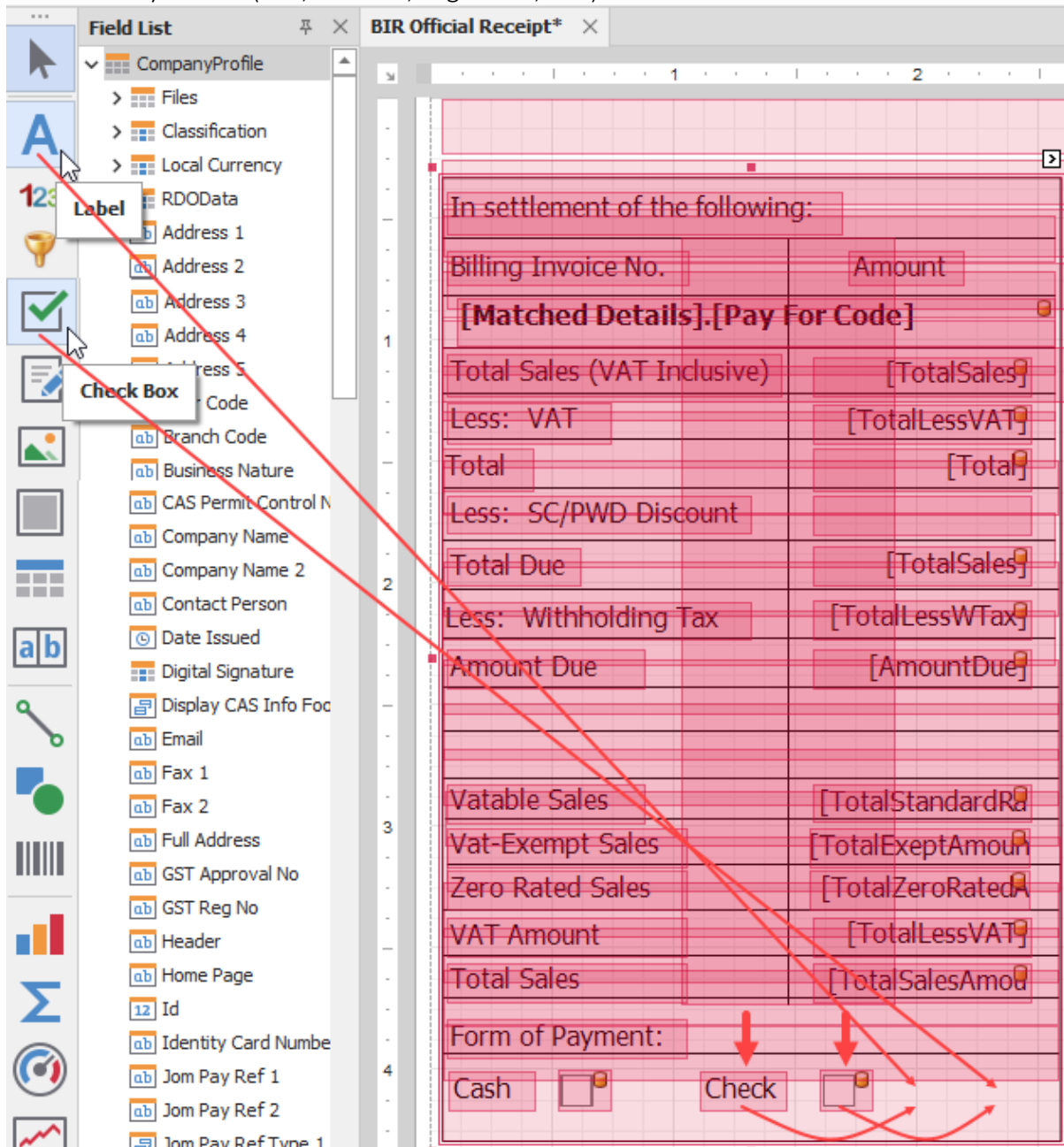
2. Select a default format you wish to modify/customize then click Amend. We can use the 'BIR Receipt' in this example.

Reports - Receipt V				
#	Name		Default	
<SR>01	BIR Official Receipt	System	☒	 
<SR>02	Receipt Voucher	System	☐	
<SR>03	Receipt Voucher - Full Page(Letter)	System	☐	

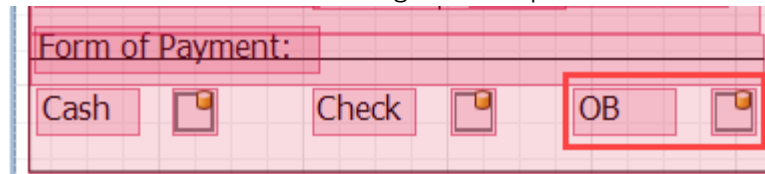
3. If it's the first time that you will be modifying the report format, you need to type a new Display Name (e.g. BIR Official Receipt - Amended), and click Create.



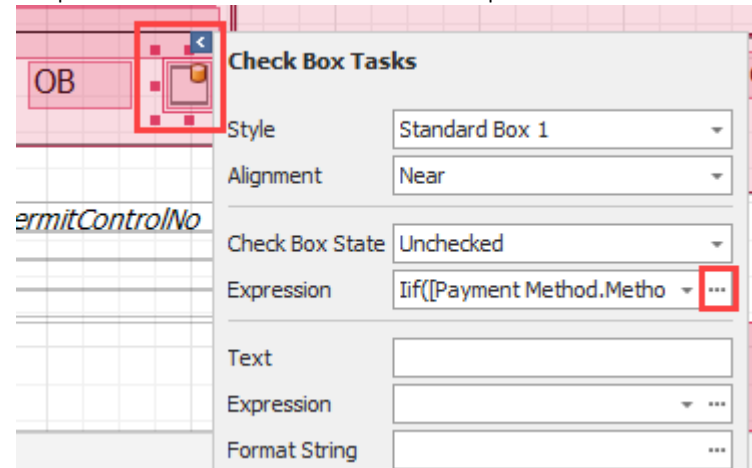
4. In Report Designer, copy and paste the Label and the Checkbox for the 'Check' payment method. You may also use the 'Label' and 'Checkbox' tools (drag & drop). Make the necessary format (size, location, alignment, etc.).



5. Rename the Label to 'OB' for Online Banking for example.

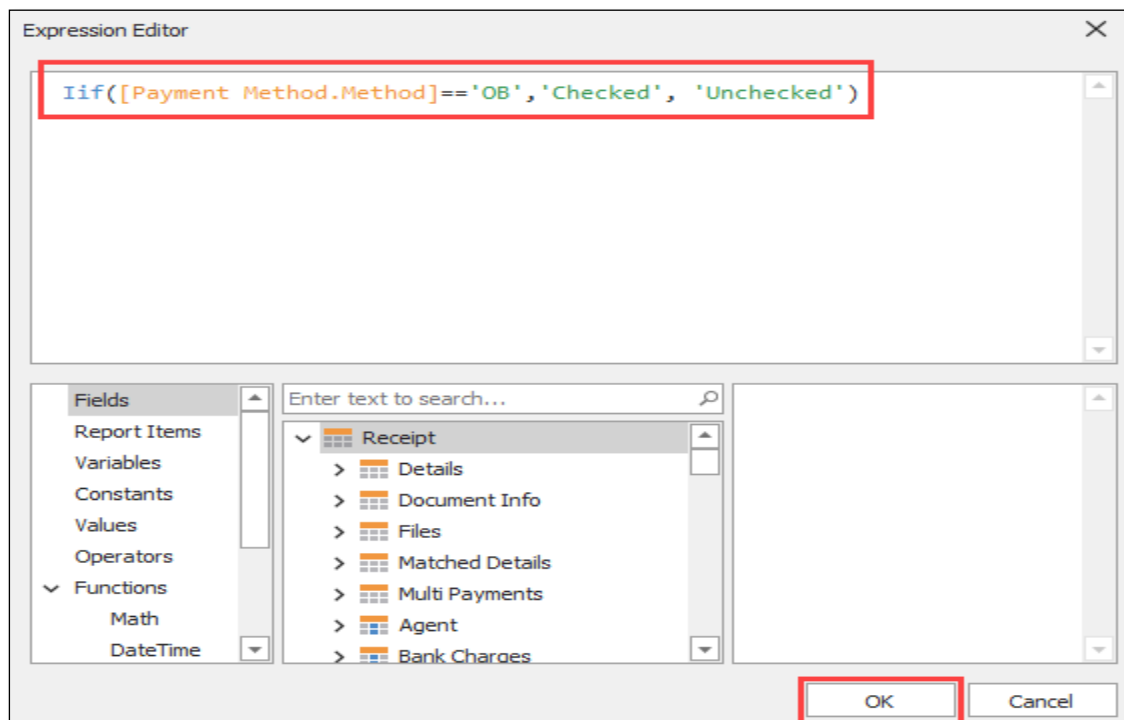


6. Click the checkbox for 'OB' and click on the small arrow to show more options. Click the 3-dot button for Expression and this will show the Expression Editor.



7. Change the expression and click OK.

Expression: `Iif([Payment Method.Method]='OB','Checked', 'Unchecked')`

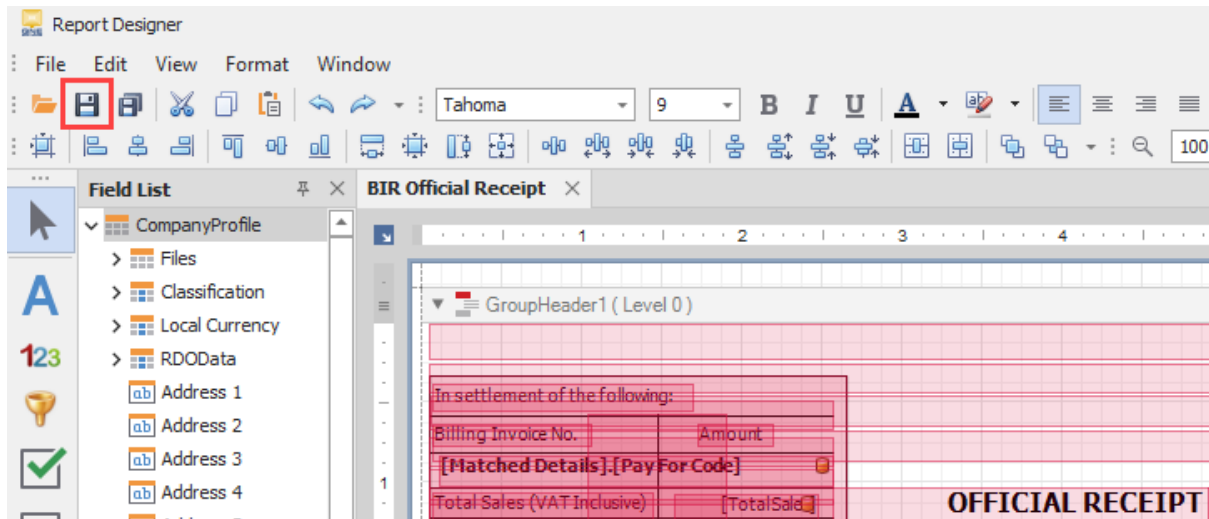


Note:

Do the same thing to the checkbox for 'Check' payment method using the expression below, else it will remain checked if the user will not choose Cash.

```
lif([Payment Method.Method]== 'Cheque', 'Checked', 'Unchecked')
```

8. Once done, click **Save**.

**Application:**

1. Create a new Payment Method, *OB - Online Banking*.

Payment Method Maintenance

Method	OB	☒ Is Active	☐ Is Default
Description	Online Banking		

2. Create Receive Payment and choose OB as Payment Method.

Receive Payments

Details Customer Others

Customer	101-A001	Receive	ADVANCE TRADING CORPORATION	Doc Date	
Currency	PHP	Agent	CINDY	Receipt #	
Rate	1.00000000	Bank Charges	0.00	Cheque/Ref No.	
Deposit To	BANCO DE ORO	Payment Method	OB	Amount	

3. Preview the OR printout using the created custom format (BIR Official Receipt - Amended).

In settlement of the following:		OFFICIAL RECEIPT	
Billing Invoice No.	Amount		
INV00001		DATE <u>October 01, 2022</u>	
Total Sales (VAT Inclusive)	1,120.00		
Less: VAT	120.00	Received from <u>ADVANCE TRADING CORPORATION</u> with TIN <u>780-090-909</u> 0000	
Total	1,000.00		
Less: SC/PWD Discount		and address at <u>35, WEST OF AYALASE, JIL PUYAT, MAKATI CITY</u>	
Total Due	1,120.00		
Less: Withholding Tax		engaged in the business style of _____, the sum of	
Amount Due	1,120.00		
		ONE THOUSAND ONE HUNDRED TWENTY ONLY	
Vatable Sales	1,000.00		
Vat-Exempt Sales		(Php <u>1,120.00</u>) in partial/full payment for <u>PAYMENT FOR INV 0005</u>	
Zero Rated Sales			
VAT Amount	120.00	Sr. Citizen TIN	
Total Sales	1,120.00		
Form of Payment:		By: _____ Cashier / Authorized Representative	
Cash ☐	Check ☐		
	OB ☒	OSCA/PWD ID No. _____ Signature _____	
		No. OR2210/001	



For further concerns regarding this matter, please contact support to assist you or create ticket thru this link <https://support.qne.com.ph>