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Automatic filling of the payment method, bank account and card company

When an [invoice](#) or a [quote](#) is created, Brix fills in the **{Method of Payment}**, **{IBAN}** and **{Card Company}** fields itself whenever the choice is unambiguous. When the choice is not unambiguous, the field stays empty so that the user selects it deliberately. The same rule for the **{Card Company}** field applies in [till payments](#) and [POS sales](#). What is offered in a given department at all is defined in the [~ PAYMENT METHODS ~](#) tab of the [Departments](#) form.

Method of payment

- **One payment method entered in the department**
That payment method is filled into the document automatically as soon as it is created.
- **Several payment methods entered in the department**
The **{Method of Payment}** field stays empty and must be selected before the document is saved.
- **No payment method entered in the department**
No payment method can be selected; at least one must be entered in the department.



The entered payment method is stored with the **SAVE** button and does not wait for the document to be closed.

Bank account (IBAN)

The **{IBAN}** field is shown only when the payment method *Bank Transfer* is selected. Only the bank accounts entered in the department are offered.

- **One bank account entered in the department**
That IBAN is filled into the document automatically.
- **Several bank accounts entered in the department**
The field stays empty and the user must deliberately select one of the entered bank accounts.



The selected IBAN is remembered even when the payment method is changed. Switching to e.g. *Cash* removes the **{IBAN}** field from the screen, and switching back to *Bank Transfer* shows the previously selected IBAN again.



In [POS sales](#) and [till payments](#) bank transfer payments are not entered, so the **{IBAN}** field does not appear there.

Card company

The **{Card Company}** field is shown only when the payment method *Card* is selected. Only the card companies entered in the department are offered, one per POS terminal. The rule is identical to the one for the payment method and IBAN and applies in invoices, quotes, till payments and POS sales.

- **One card company entered in the department**

That card company is filled into the document automatically as soon as the payment method *Card* is selected.

- **Several card companies entered in the department**

The field stays empty, the drop-down list offers all entered card companies, and the user must deliberately select the one whose POS terminal took the payment.

- **No card company entered in the department**

The field offers nothing and a document with the payment method *Card* cannot be completed. A card company must be entered next to the payment method *Card* in the **~ PAYMENT METHODS ~** tab of the department.



An automatically filled card company behaves exactly like a manually selected one: in invoices and quotes it is stored with the **SAVE** button, in till payments and POS sales by closing the document.



In invoices and quotes the selected card company is remembered even when the payment method is changed. Switching to e.g. *Cash* removes the **{Card Company}** field from the screen, and switching back to *Card* shows the previously selected card company again. In till payments and POS sales the document is closed immediately upon payment, so there is no changing of the payment method on an already entered document.

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