Create a CSV to Collect Payments via Third Parties

Finance · https://mountainstream.co/docs/csv-third-party-payments/

[A screenshot shows navigation on a dashboard. Step 1 highlights the FINANCE menu, step 2 shows Payment Collection CSV in a dropdown for those looking to create a CSV to collect payments via third parties, and step 3 indicates a green + Add new button.]

[Screenshot of a Payment Collection CSV setup form in Melio, with purple annotations explaining field requirements—such as values from Finance > Settings—when you Create a CSV to Collect Payments via Third Parties and match column names to the payment gateway.]

Get Started