

Account Class - Option to Disable Adding Stored Payment Method Added (15239) [Enhancement]

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A new field 'Disable Adding Account Payment Method' has been added to the Credit Card/ACH section of the Portal/Payment Processing tab. When enabled, the ability to save payment methods in AR History and the Payments tab of a work order will be disabled for accounts that belong to the assigned account class.

The screenshot shows the 'ADD ACCOUNT CLASS' interface with the 'Portal / Payment Processing' tab selected. The form is divided into two main sections: 'Account Portal' and 'Credit Card/ACH'. The 'DISABLE ADDING ACCOUNT PAYMENT METHOD' field in the 'Credit Card/ACH' section is highlighted with a red box and is set to 'Yes'. Other fields include 'ENABLE ACCOUNT PORTAL PAY PROCESSING FEE' (checked), 'ENABLE MANUAL PAY PROCESSING FEE' (unchecked), 'ENABLE AUTO PAY PROCESSING FEE' (unchecked), 'ENABLE ORDER PAY PROCESSING FEE' (unchecked), 'CREDIT CARD PROCESSING FEE TYPE' (None), 'CREDIT CARD FEE AMOUNT', 'CREDIT CARD PROCESSING FEE CHARGE CODE', 'ACH PROCESSING FEE TYPE' (None), 'ACH FEE AMOUNT', 'ACH PROCESSING FEE CHARGE CODE', 'AUTO PAY DECLINED FEE CHARGE CODE', 'AUTO PAY DECLINED FEE AMOUNT', and 'BILLING AUTO PAY AMOUNT'. A 'SAVE' button is located at the bottom of the form.

Field Name	Value
ENABLE PORTAL ACCESS	Yes
ACCOUNT PORTAL HOME PAGE	
ENABLE ADD SITES	No
NEW LOCATION TEMPLATE	
NEW LOCATION BUNDLE	
ENABLE ON CALL ORDERS	No
ENABLE REPORT ACCESS	
ENABLE SERVICE PHOTO DISPLAY	
ENABLE ACCOUNT PORTAL PAY PROCESSING FEE	<input checked="" type="checkbox"/>
ENABLE MANUAL PAY PROCESSING FEE	<input type="checkbox"/>
ENABLE AUTO PAY PROCESSING FEE	<input type="checkbox"/>
ENABLE ORDER PAY PROCESSING FEE	<input type="checkbox"/>
DISABLE ADDING ACCOUNT PAYMENT METHOD	Yes
CREDIT CARD PROCESSING FEE TYPE	None
CREDIT CARD FEE AMOUNT	
CREDIT CARD PROCESSING FEE CHARGE CODE	
ACH PROCESSING FEE TYPE	None
ACH FEE AMOUNT	
ACH PROCESSING FEE CHARGE CODE	
AUTO PAY DECLINED FEE CHARGE CODE	
AUTO PAY DECLINED FEE AMOUNT	
BILLING AUTO PAY AMOUNT	

Pathway: Setup > Account > Account Class