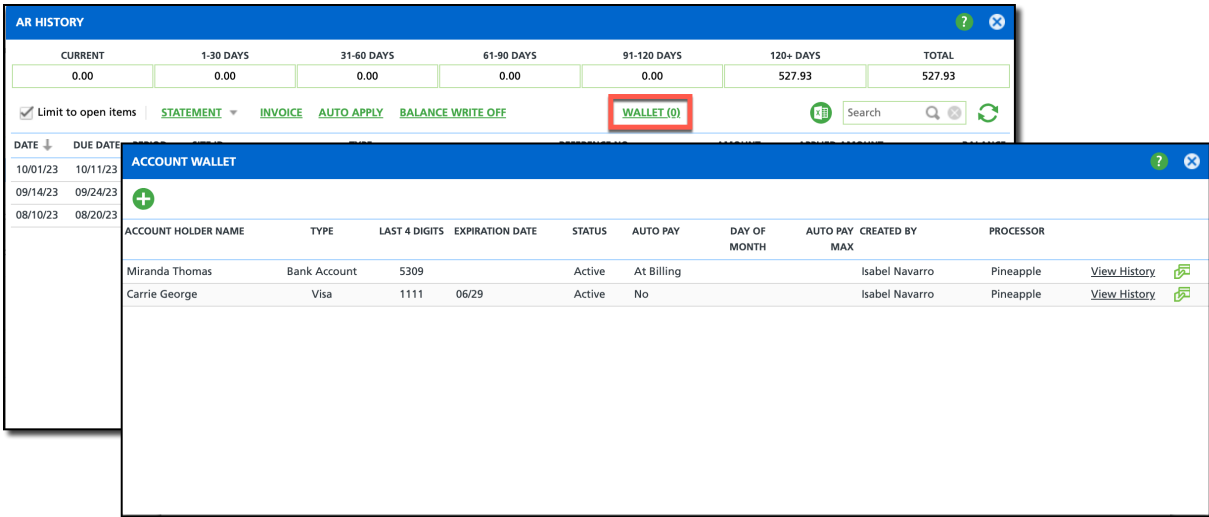


Accounts - Add Payment Method / Make Payment Method Inactive

Last Modified on 07/11/2024 9:31 am EDT

Pathway: [Accounts](#) > [Search](#) > [Accounts](#)

Manage payment methods for an account by using the Wallet link on the AR History screen. Displayed with the Wallet link is a numeric value in parentheses to indicate the current number of payment methods associated to the account.

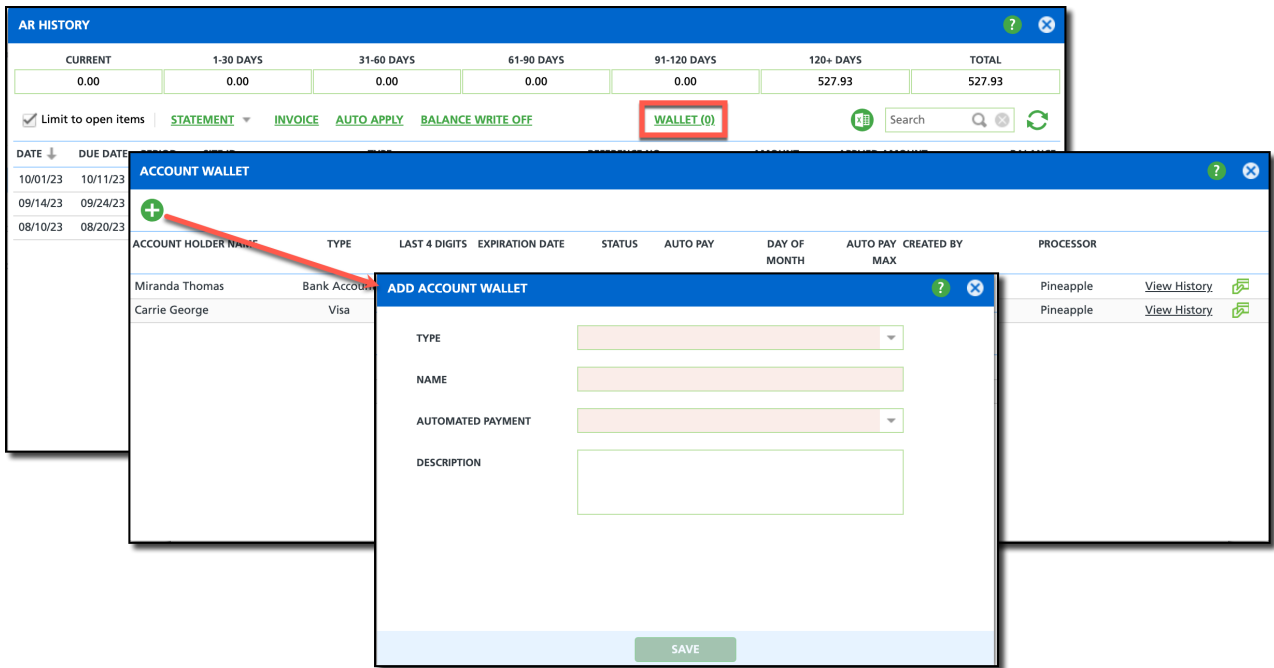


Permissions

The following permissions are required to add payment methods and edit their active status:

Permission ID	Permission Name
5	View Account
6	View Site
41	View AR History

Add Account Wallet



Field Descriptions

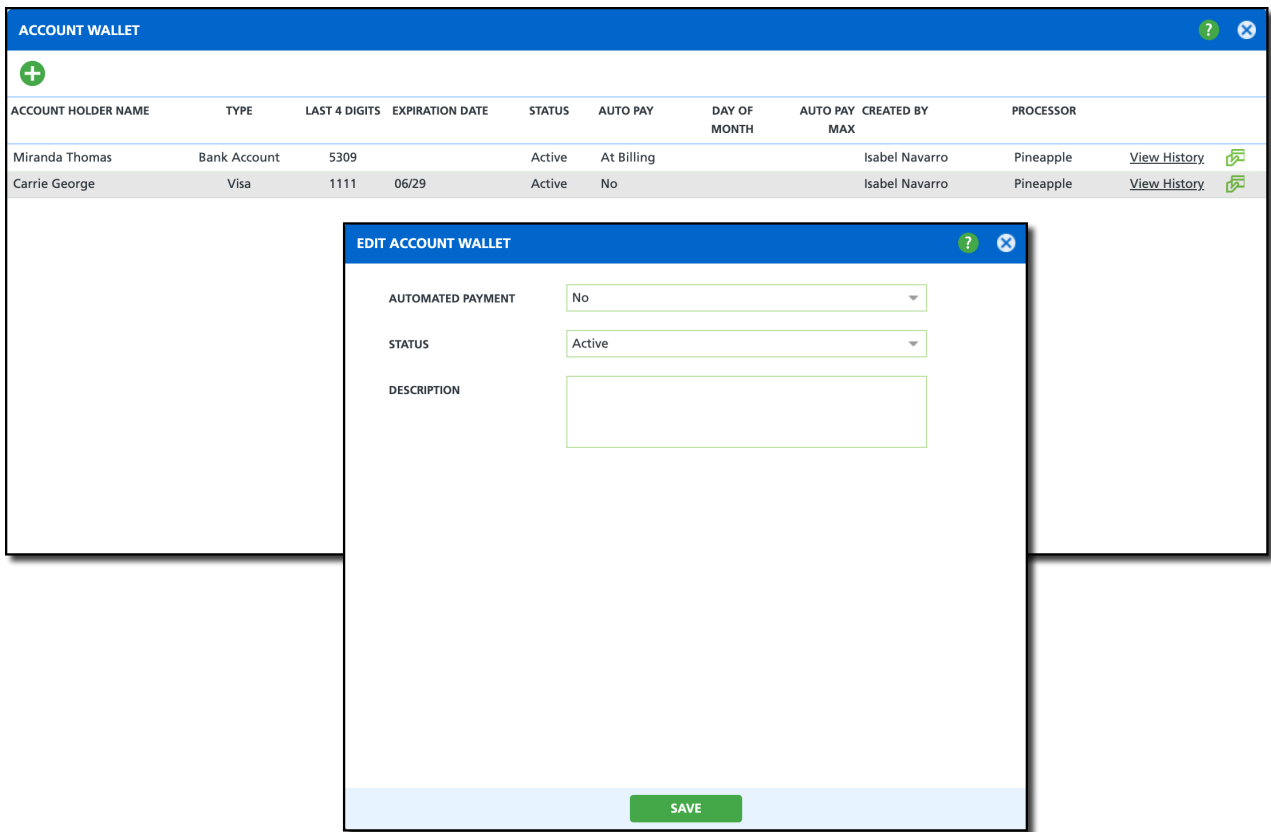
Field	Description
Type	Identifies the type of wallet that will be used: credit card or bank account.
Name	Identifies the name on the credit card or bank account.
Automated Payment	Determines if the payment method can be processed automatically with auto pay. <ul style="list-style-type: none"> No - If selected, disables auto pay for the wallet. Scheduled Day - If selected, a 'Day of Month' field is displayed to identify which day of the month auto pay should process using the wallet. At Billing - If selected, auto pay will use the wallet for payment processing at the time the account is billed.
Description	Option to add additional information associated to the payment method.

Add Account Wallet

1. From AR History, click on the 'Wallet' link to open the Account Wallet popup window. This will display a list of Active and Inactive payment methods for the account.
2. Select the green + icon to open Add Account Wallet popup window.
3. Complete the following required fields:
 - o Select the **Type** of payment method being entered, either Bank Account or Credit Card.
 - o Enter the **Name** of the person associated with the payment type.
 - o Select the **Automated Payment** option the payment method should follow.
4. Click **Save** when finished.

Edit Account Wallet

Update an account's payment method to either enable or disable auto-pay, or to activate/inactivate the selected payment method.



Field Descriptions

Field	Description
Automated Payment	Enables the payment method into auto pay. If no is selected, auto pay can not be processed with the payment method. Auto pay options include: <ul style="list-style-type: none"> • At Billing: auto pay will use the payment method to process payment at the time of billing. • Scheduled Day: auto pay will use the payment method to process payment on the chosen day of month. A 'Day of Month' field displays if this option is selected.
Status	Determines if the payment method is active and available for use.
Description	Additional details regarding the payment method.

Edit Payment Method

1. Double click on a payment method to open the 'Edit Account Wallet' popup window.
2. Edit the necessary fields for the payment method.
3. Click **Save** when finished.