

# Accounts - Add Payment Method / Make Payment Method Inactive

Last Modified on 11/26/2024 6:16 am PST

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.

The screenshot displays two overlapping windows from a software application. The top window, titled 'AR HISTORY', features a summary table with columns for 'CURRENT', '1-30 DAYS', '31-60 DAYS', '61-90 DAYS', '91-120 DAYS', '120+ DAYS', and 'TOTAL'. Below this table are several action links: 'Limit to open items', 'STATEMENT', 'INVOICE', 'AUTO APPLY', 'BALANCE WRITE OFF', and 'WALLET (0)'. The 'WALLET (0)' link is highlighted with a red rectangular box. The bottom window, titled 'ACCOUNT WALLET', contains a table with the following data:

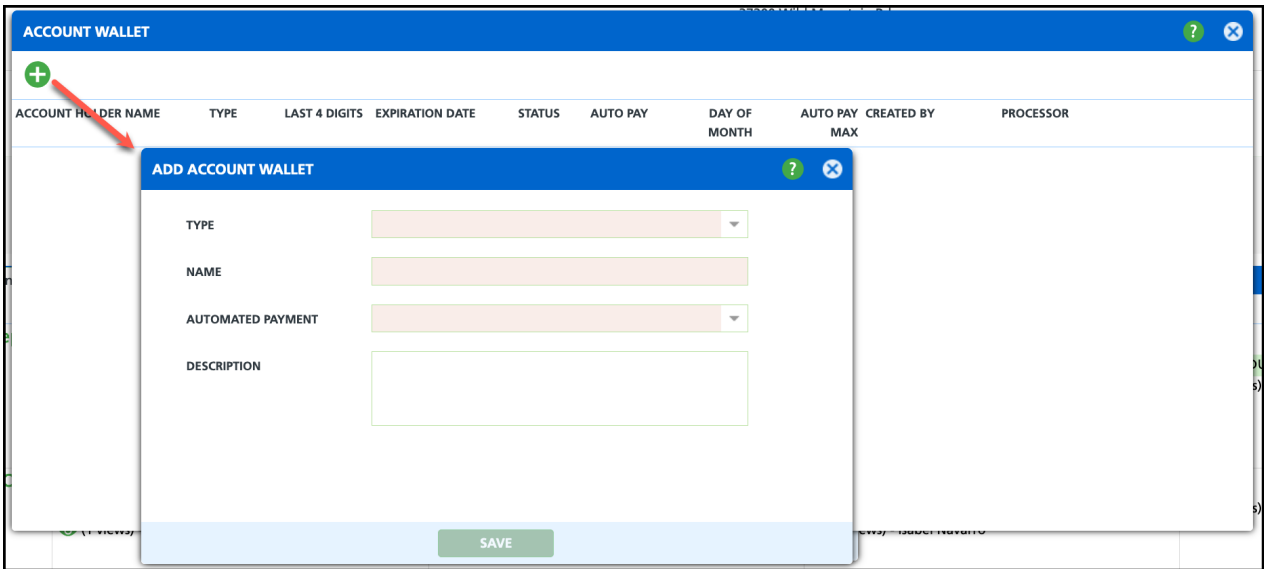
ACCOUNT HOLDER NAME	TYPE	LAST 4 DIGITS	EXPIRATION DATE	STATUS	AUTO PAY	DAY OF MONTH	AUTO PAY MAX	CREATED BY	PROCESSOR	View History
Miranda Thomas	Bank Account	5309		Active	At Billing			Isabel Navarro	Pineapple	<a href="#">View History</a>
Carrie George	Visa	1111	06/29	Active	No			Isabel Navarro	Pineapple	<a href="#">View History</a>

## Permissions

The following permissions are required to add payment methods:

Permission ID	Permission Name
5	View Account
6	View Site
41	View AR History
278	Add Account Wallet

## Add Account Wallet



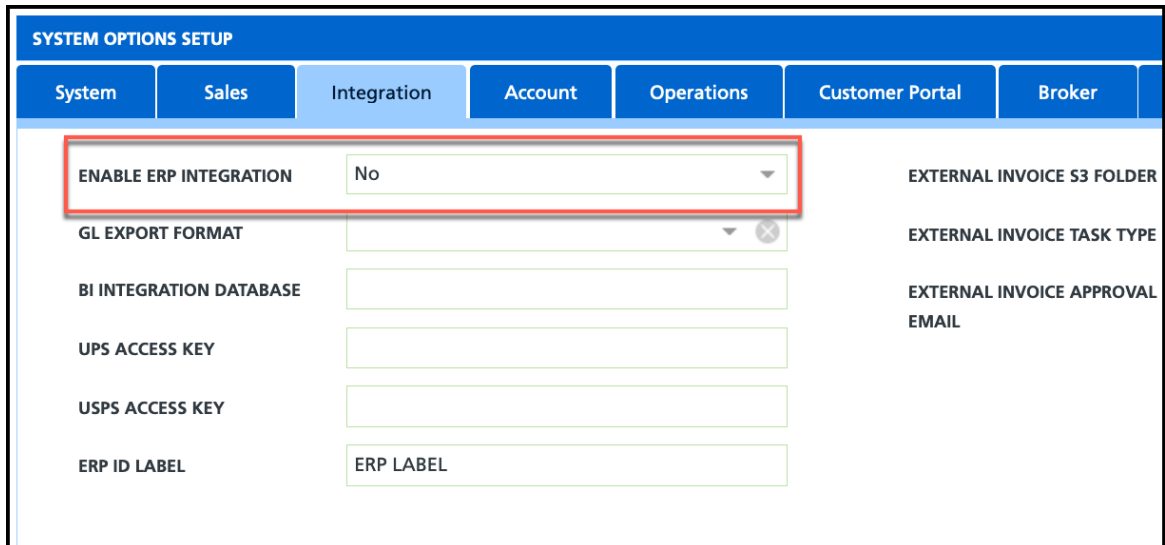
## Setup Requirements

The following settings must be enabled or the option to add a payment method will be hidden:

### System Options

**Pathway:** *Setup > System > System Options*

In the Integration tab of System Options, the **Enable ERP Integration** setting must be configured to any option other than 'External System' to ensure the Wallet feature is displayed. A selection here supersedes all other settings that enable the Wallet.



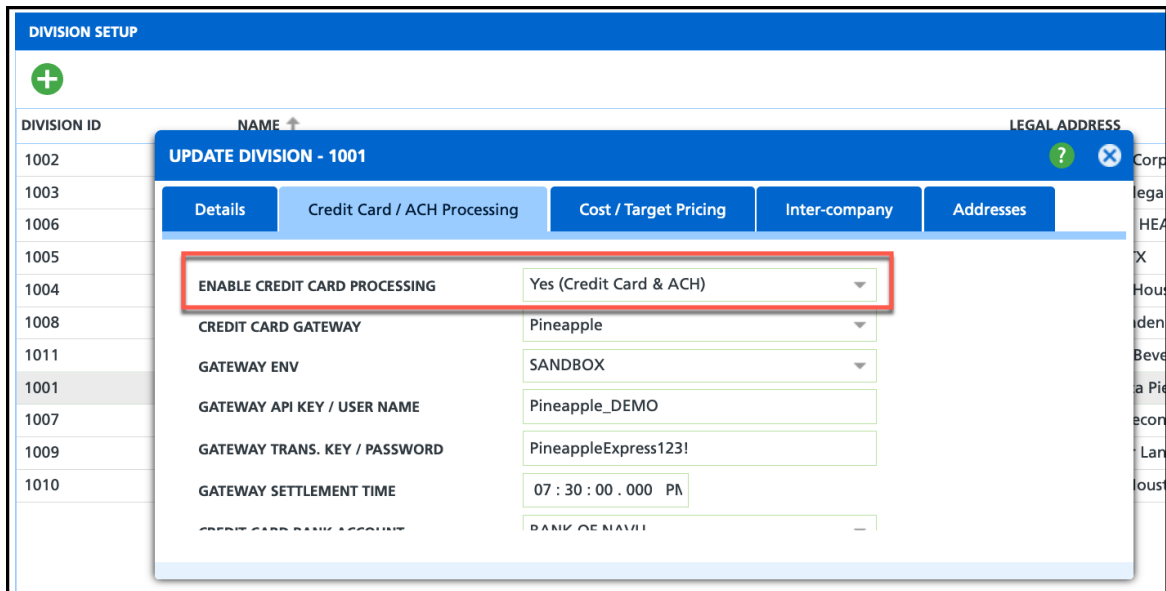
### Division

**Pathway:** *Setup > System > Division*

In the Credit Card / ACH Processing tab of Add/Update Division screens, set the *Enable Credit Card Processing* field to one of the available options:

- Yes (Credit Card & ACH)
- Yes (Credit Card Only)

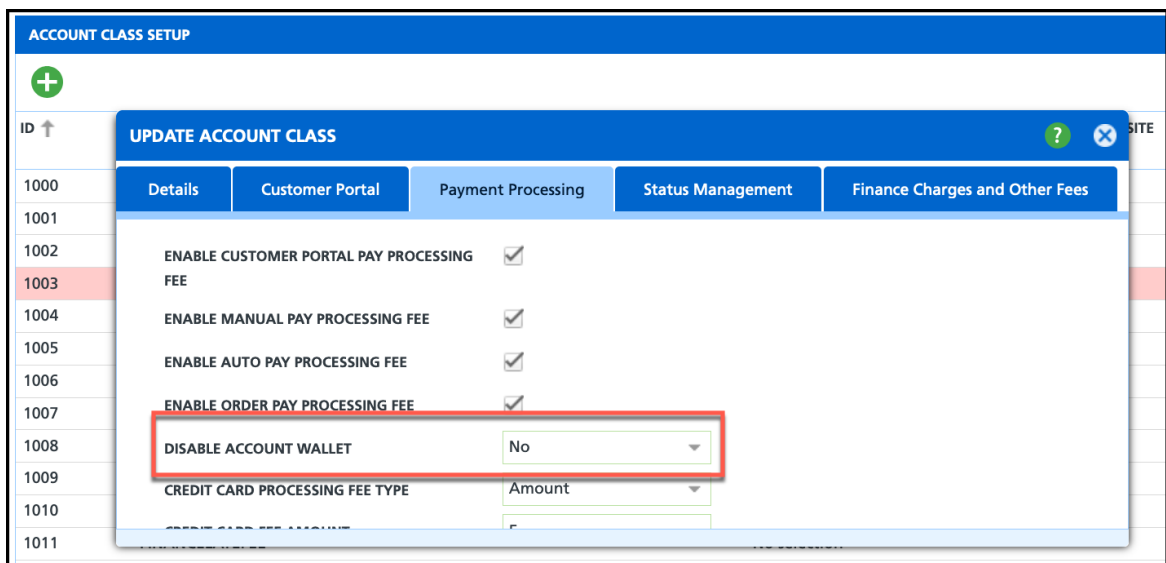
If this field is set to 'No,' the Add icon in the Account Wallet popup will be hidden.



### Account Class

**Pathway:** [Setup](#) > [Account](#) > [Account Class](#)

In the Payment Processing tab of the Add/Update Account Class screens, set the Disable Account Wallet field to 'No' for the Add option to appear in Wallet. This setting also enables a 'Save for Reuse' checkbox in the Add Payment popup when using a credit card to pay on a work order (*Service Record > Payments > Add Payment*).



### 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.

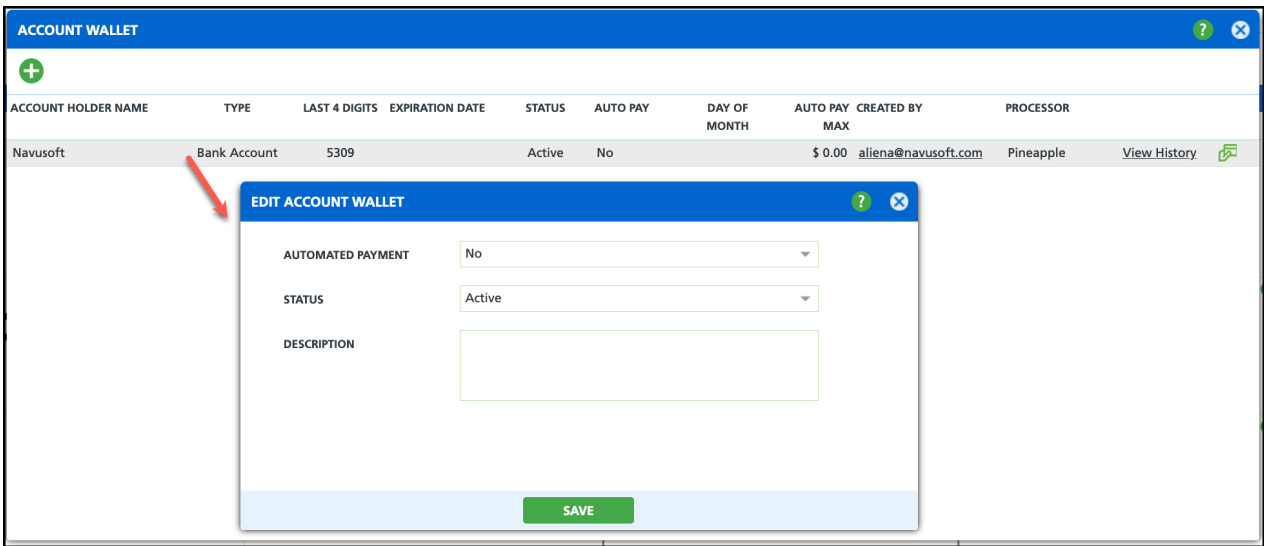
<b>Automated Payment</b>	<p>Determines if the payment method can be processed automatically with auto pay.</p> <ul style="list-style-type: none"> <li>• No - If selected, disables auto pay for the wallet.</li> <li>• Scheduled Day - If selected, a 'Day of Month' field is displayed to identify which day of the month auto pay should process using the wallet.</li> <li>• At Billing - If selected, auto pay will use the wallet for payment processing at the time the account is billed.</li> </ul>
<b>Description</b>	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:
  - Select the **Type** of payment method being entered, either Bank Account or Credit Card.
  - Enter the **Name** of the person associated with the payment type.
  - 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
<b>Automated Payment</b>	<p>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:</p> <ul style="list-style-type: none"> <li>• <b>At Billing:</b> auto pay will use the payment method to process payment at the time of billing.</li> <li>• <b>Scheduled Day:</b> 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.</li> </ul>

<b>Status</b>	Determines if the payment method is active and available for use.
<b>Description</b>	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.
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