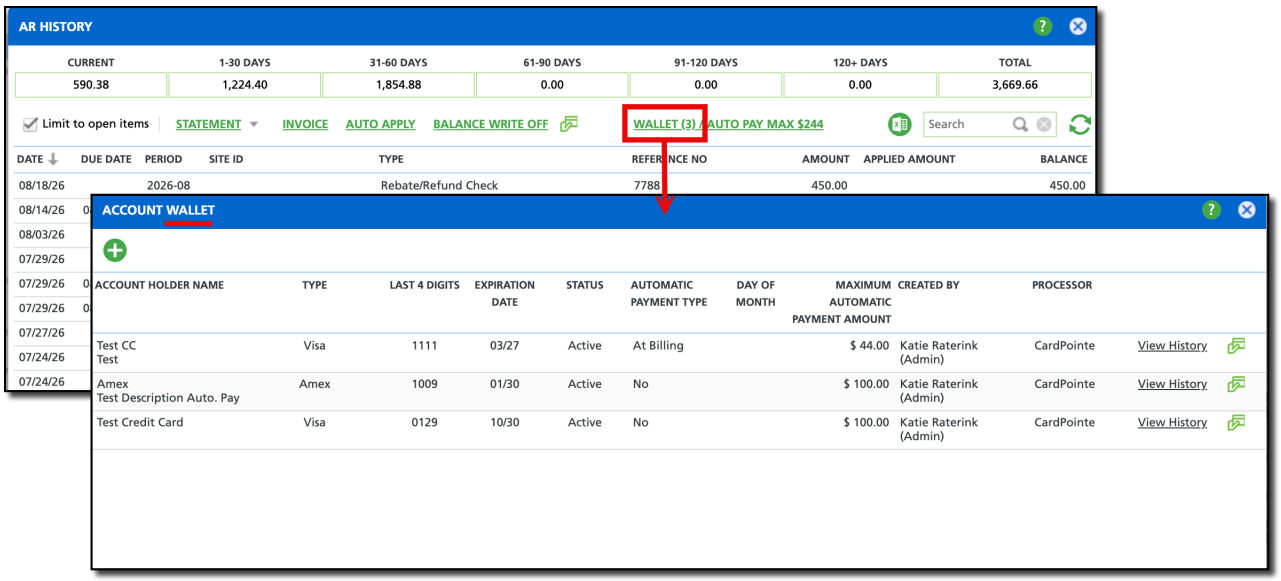
Accounts - Add Payment Method / Make Payment Method Inactive

Last Modified on 09/17/2026 12:41 pm PDT

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. In addition, if there is a maximum amount set for auto pay, then this will be indicated.



Field Descriptions

Field	Description
Account Holder Name	The name for the account holder for the credit card or bank account.
Type	The type of payment that will be used: Credit Card or Bank Account.
Last 4 Digits	The last four digits of the credit card or the bank account.
Expiration	The expiration date of the credit card
Status	Displays Active or Inactive based on the current status of the credit card.

Automatic Payment Type	If the payment method can be processed automatically with auto pay and if so, when the auto pay occurs. • No - If selected, disables auto pay for the wallet. • Scheduled Day - auto pay process will occur on a specific day of the month using the wallet. • At Billing - If selected, auto pay will use the wallet for payment processing at the time the account is billed. To learn more about Auto Pay and how it is set up, review the Auto Pay Setup article.
Day of Month	If Auto Pay is set to Scheduled Day, then the Day of the Month that it has been scheduled for is displayed.
Maximum Automatic Payment Amount	If enabled in the Customer Portal tab of the *System > System Options* setup, the value entered which is the max amount that can be charged during auto pay processing.
Created By	The person that entered the wallet entry.
Processor	The processor that is to be used when processing the bank account or credit card.
View History (hyperlink)	Click on this link to open the Account Payment Method History screen which lists all payments made against that payment method in the wallet.
Post a Payment (icon)	Make a payment against that payment method.

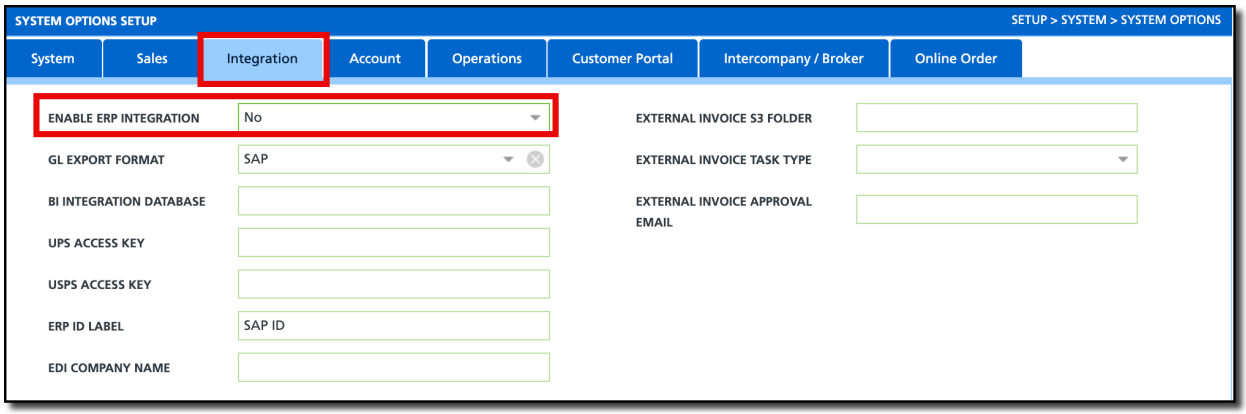
Wallet Setup Requirements

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

System Options Setup

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.



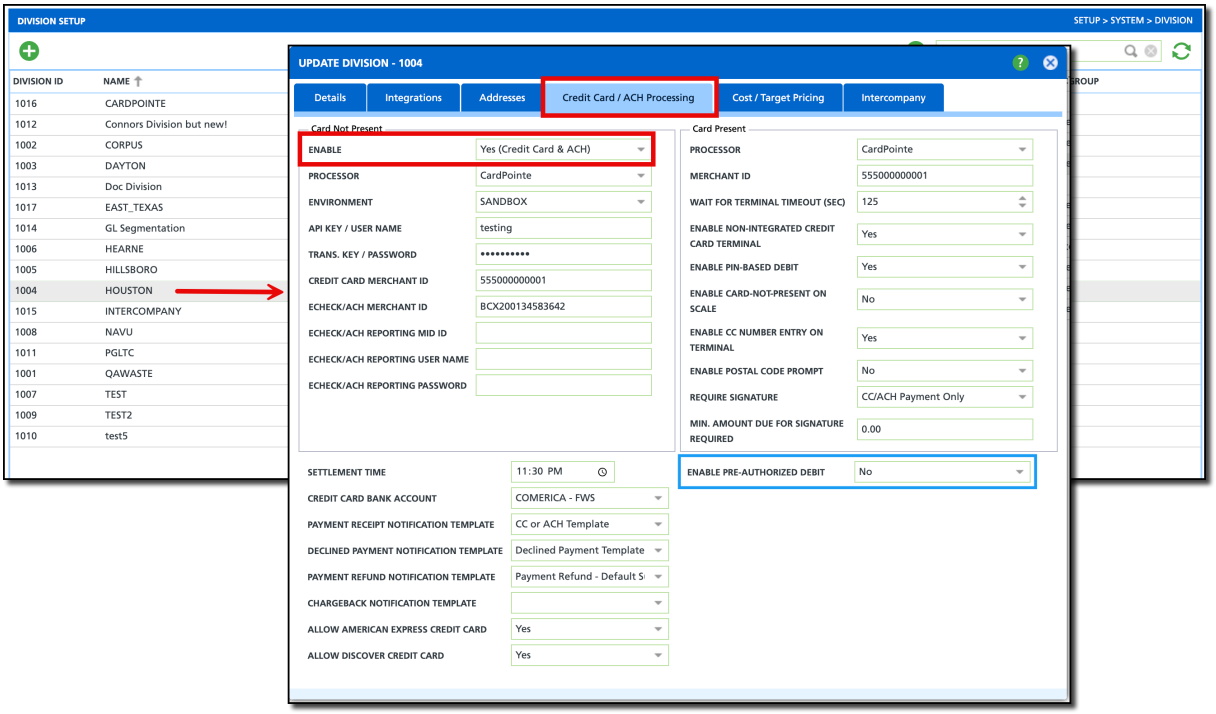
Division Setup

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.



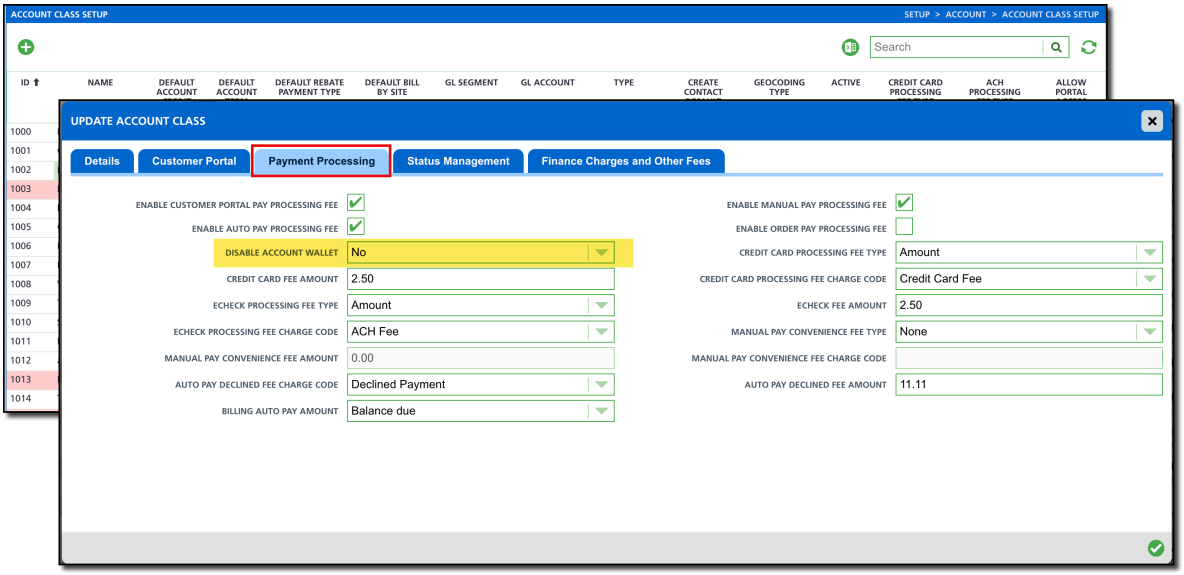
For our Canadian customers, set the **Enable Pre-Authorized Debit** to 'Yes' to utilize Pre-Authorized Debit (PAD) cards. To learn more, review the Canadian Pre-Authorized Debit (PAD) Setup and Processing article.

Account Class Setup

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.

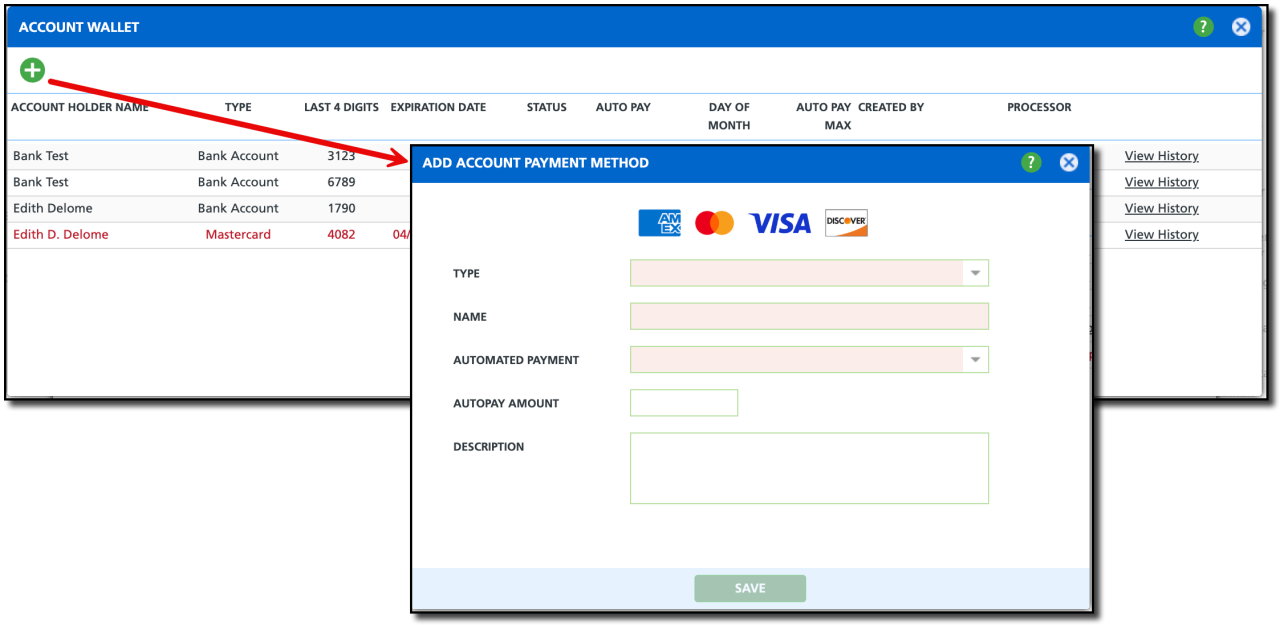
This setting also enables a 'Save for Reuse' checkbox in the Add Payment popup when using a credit card to pay on a work order *(Service Record > Payments > Add Payment)*.



To learn more about the configurations for the Payment Processing, refer to the Account Class Setup article.

Add to Account Wallet

Just like a personal wallet can hold many credit cards, Account Wallet can have many credit cards and bank accounts associated with it.



Field Descriptions

Field	Description

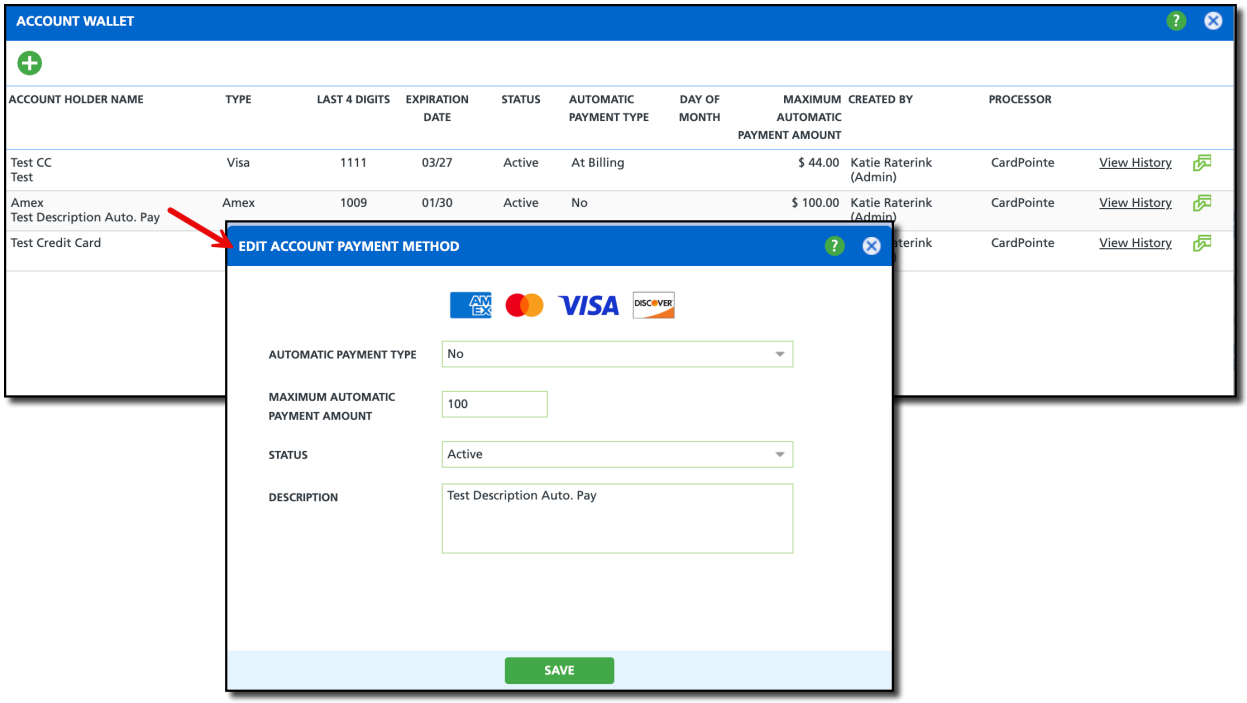
Type	Identifies the payment method type to be used, either a credit card or bank account. Based on the selection, additional fields will be displayed to capture the required payment method details. Note: For Canadian customers, if Pre-Authorized Debit (PAD) is enabled at the Division level, the option to select PAD is provided. To learn more, review the Canadian Pre-Authorized Debit (PAD) Setup and Processing article.
Name	Identifies the name on the credit card or bank account.
Automated Payment Type	Determines if the payment method can be processed automatically with auto pay. • **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.
Maximum Automatic Payment Amount	The maximum amount that can be automatically charged to this payment method.
Description	Option to add additional information associated to the payment method.

Add Payment Method

1. From the Account Wallet, select the **green +** icon to open *Add Account Payment Method* window.
2. Complete the following required fields:
   - Select the payment method type, either Bank Account or Credit Card. Based on the selection, the appropriate fields will be displayed to enter the payment method details.
   - Enter the **Name** of the person/company associated with the payment type.
   - Select the **Automated Payment** option the payment method should follow.
3. 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. Payment methods cannot be deleted but can set to inactive.



Field Descriptions

Field	Description
Automated Payment Type	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: • **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.
Maximum Automatic Payment Amount	The maximum amount that can be automatically charged to this payment method.
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.

For Canadian customers, if Pre-Authorized Debit (PAD) is enabled at the Division level, what you can edit is a little different. To learn more, review the Canadian Pre-Authorized Debit (PAD) Setup and Processing article.

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

Related Articles

Account Class Setup
Division Setup
System Options Setup
AR History Overview
Canadian Pre-Authorized Debit (PAD) Setup and Processing