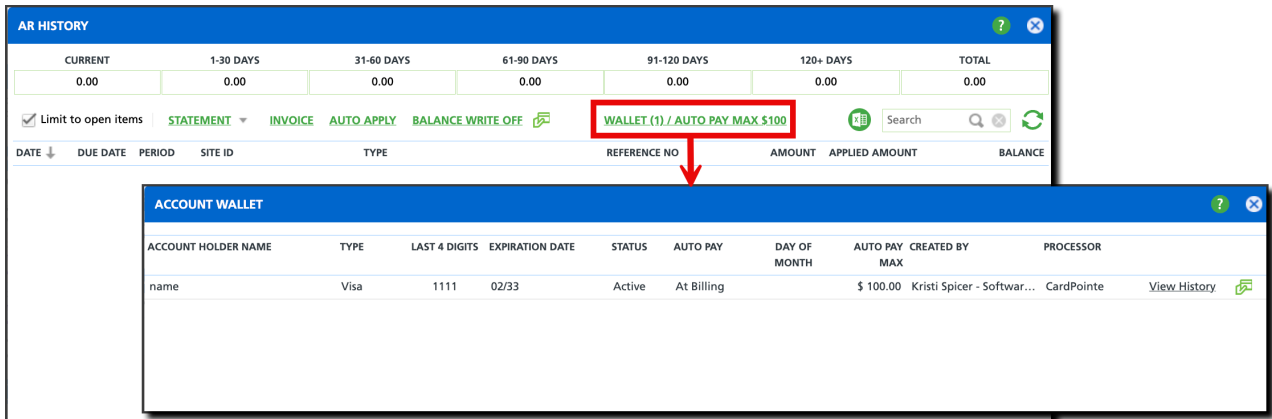


Accounts - Add Payment Method / Make Payment Method Inactive

Last Modified on 06/01/2026 12:40 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.
Auto Pay	<p>If the payment method can be processed automatically with auto pay and if so, when the auto pay occurs.</p> <ul style="list-style-type: none"> 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. <p>To learn more about Auto Pay and how it is set up, review the Auto Pay Setup article.</p>
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.

Auto Pay Max	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.

The screenshot shows the 'SYSTEM OPTIONS SETUP' interface with the 'Integration' tab selected. The 'ENABLE ERP INTEGRATION' dropdown menu is highlighted with a red box and is currently set to 'No'. Other visible fields include 'GL EXPORT FORMAT' (SAP), 'BI INTEGRATION DATABASE', 'UPS ACCESS KEY', 'USPS ACCESS KEY', 'ERP ID LABEL' (SAP ID), 'EDI COMPANY NAME', 'EXTERNAL INVOICE S3 FOLDER', 'EXTERNAL INVOICE TASK TYPE', and 'EXTERNAL INVOICE APPROVAL EMAIL'.

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.

DIVISION SETUP SETUP > SYSTEM > DIVISION

SEARCH

DIVISION ID

1012
1002
1003
1013
1014
1006
1005
1004
1015
1008
1011
1001
1007
1009
1010

UPDATE DIVISION - 1001

Details | Integrations | Addresses | **Credit Card / ACH Processing** | Cost / Target Pricing | Intercompany

Card Not Present

ENABLE Yes (Credit Card & ACH)

PROCESSOR CardPointe

ENVIRONMENT SANDBOX

API KEY / USER NAME testing

TRANS. KEY / PASSWORD

CREDIT CARD MERCHANT ID 55500000001

ECHECK/ACH MERCHANT ID BCX200134583642

ECHECK/ACH REPORTING MID ID

ECHECK/ACH REPORTING USER NAME

ECHECK/ACH REPORTING PASSWORD

Card Present

PROCESSOR CardPointe

MERCHANT ID 55500000001

WAIT FOR TERMINAL TIMEOUT (SEC) 120

ENABLE NON-INTEGRATED CREDIT CARD TERMINAL No

ENABLE PIN-BASED DEBIT Yes

ENABLE CARD-NOT-PRESENT ON SCALE Yes

ENABLE CC NUMBER ENTRY ON TERMINAL No

ENABLE POSTAL CODE PROMPT No

REQUIRE SIGNATURE All Scale Transactions

MIN. AMOUNT DUE FOR SIGNATURE REQUIRED 0.00

SETTLEMENT TIME 07:30 PM

CREDIT CARD BANK ACCOUNT BANK OF NAVU

PAYMENT RECEIPT NOTIFICATION TEMPLATE CC or ACH Template

DECLINED PAYMENT NOTIFICATION TEMPLATE Declined Payment Template

PAYMENT REFUND NOTIFICATION TEMPLATE Payment Refund - Default Subject

CHARGEBACK NOTIFICATION TEMPLATE Chargeback

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*).

ACCOUNT CLASS SETUP SETUP > ACCOUNT > ACCOUNT CLASS SETUP

SEARCH

ID	NAME	DEFAULT ACCOUNT	DEFAULT ACCOUNT	DEFAULT REBATE PAYMENT TYPE	DEFAULT BILL BY SITE	GL SEGMENT	GL ACCOUNT	TYPE	CREATE CONTACT	GEOCODING TYPE	ACTIVE	CREDIT CARD PROCESSING	ACH PROCESSING	ALLOW PORTAL
1000														
1001														
1002														
1003														
1004														
1005														
1006														
1007														
1008														
1009														
1010														
1011														
1012														
1013														
1014														

UPDATE ACCOUNT CLASS

Details | Customer Portal | **Payment Processing** | Status Management | Finance Charges and Other Fees

ENABLE CUSTOMER PORTAL PAY PROCESSING FEE

ENABLE AUTO PAY PROCESSING FEE

DISABLE ACCOUNT WALLET No

CREDIT CARD FEE AMOUNT 2.50

ECHECK PROCESSING FEE TYPE Amount

ECHECK PROCESSING FEE CHARGE CODE ACH Fee

MANUAL PAY CONVENIENCE FEE AMOUNT 0.00

AUTO PAY DECLINED FEE CHARGE CODE Declined Payment

BILLING AUTO PAY AMOUNT Balance due

ENABLE MANUAL PAY PROCESSING FEE

ENABLE ORDER PAY PROCESSING FEE

CREDIT CARD PROCESSING FEE TYPE Amount

CREDIT CARD PROCESSING FEE CHARGE CODE Credit Card Fee

ECHECK FEE AMOUNT 2.50

MANUAL PAY CONVENIENCE FEE TYPE None

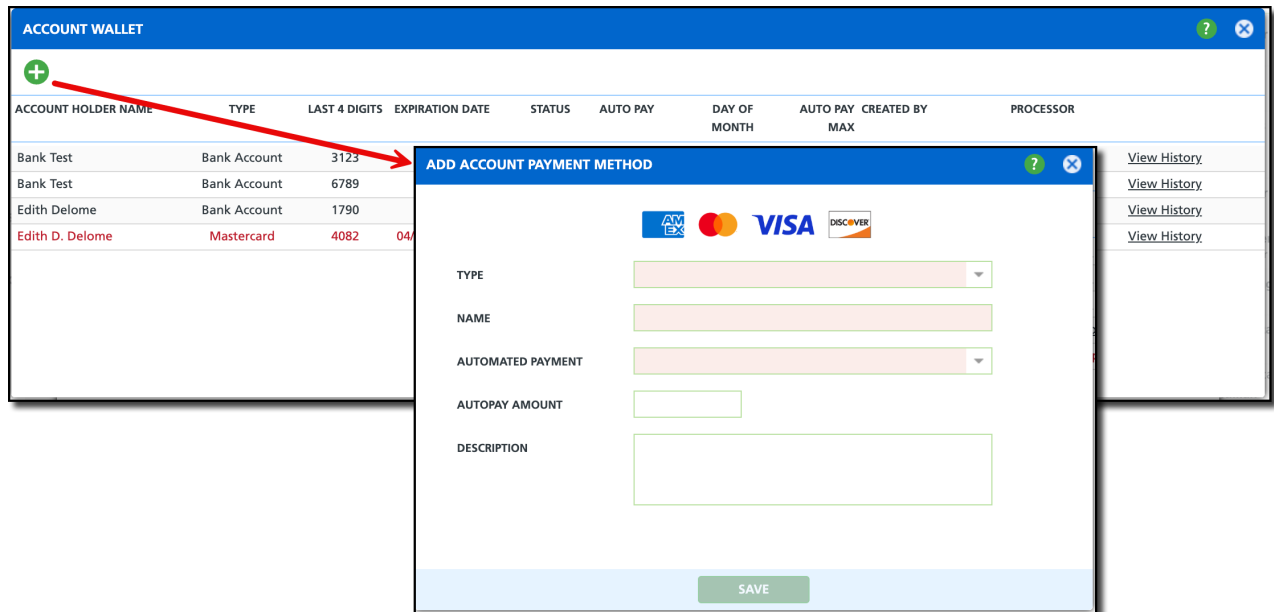
MANUAL PAY CONVENIENCE FEE CHARGE CODE

AUTO PAY DECLINED FEE AMOUNT 11.11

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

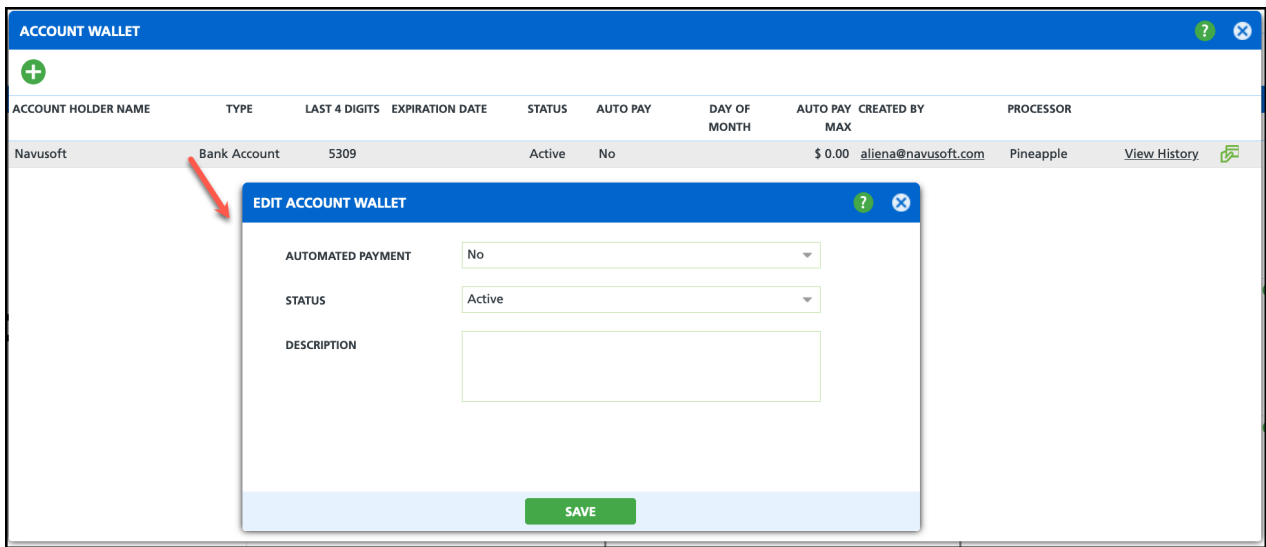
Field	Description
Type	Identifies the payment method type to be used, either a credit card or bank account. Based on the selection, additional fields will be displayed to capture the required payment method details.
Name	Identifies the name on the credit card or bank account.
Automated Payment	Determines 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.
Autopay Amount	The 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	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.

Permissions

The following permissions are required to add payment methods:

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

