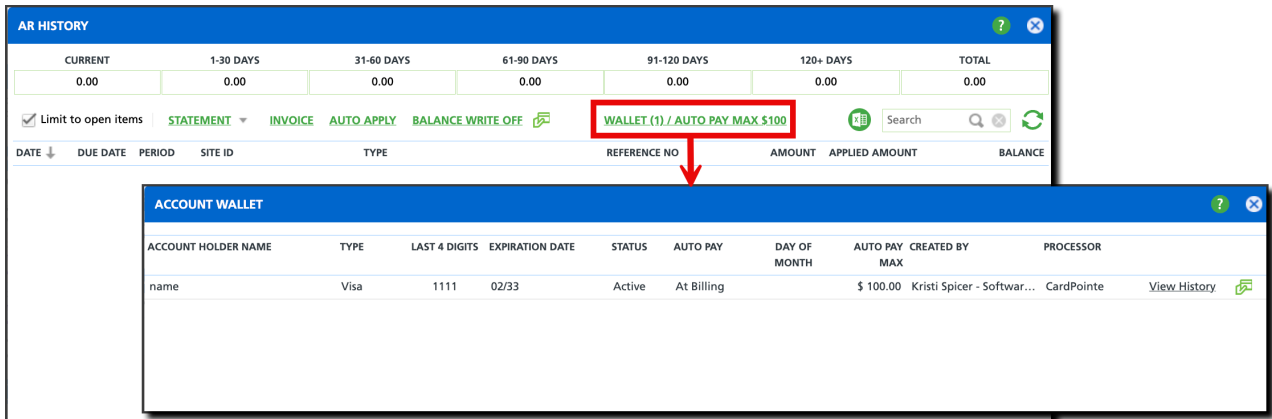


# Accounts - Add Payment Method / Make Payment Method Inactive

Last Modified on 03/24/2026 11:28 am 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.

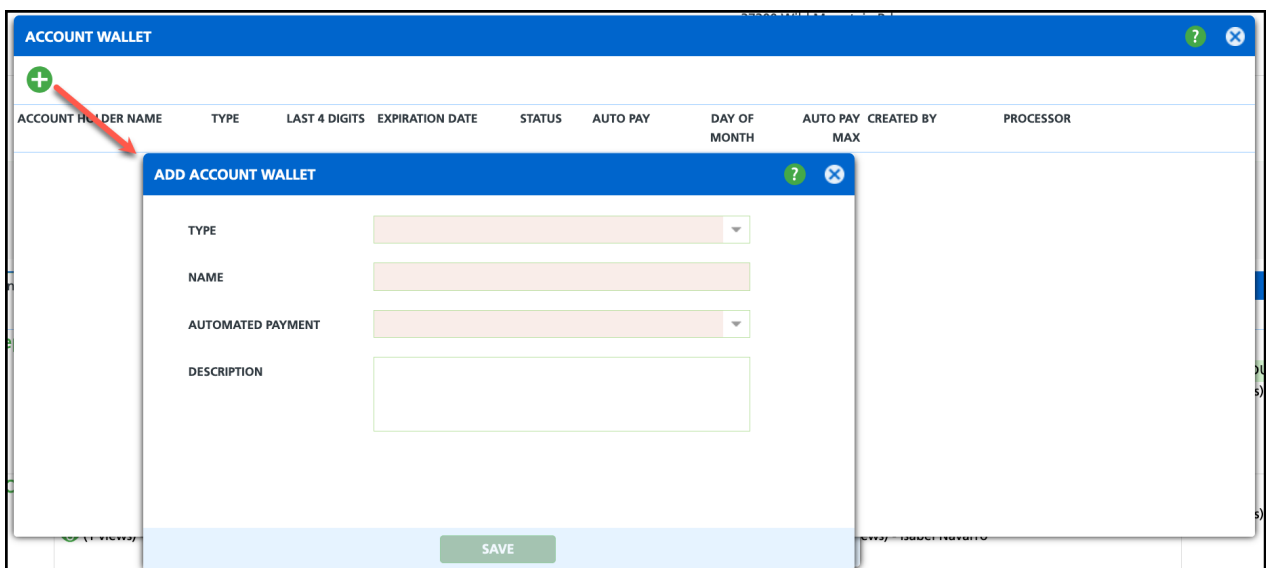


## Permissions

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.

The screenshot shows the 'SYSTEM OPTIONS SETUP' interface with the 'Integration' tab selected. A red box highlights the 'ENABLE ERP INTEGRATION' dropdown menu, which is currently set to 'No'. Other visible settings include 'GL EXPORT FORMAT', 'BI INTEGRATION DATABASE', 'UPS ACCESS KEY', 'USPS ACCESS KEY', and 'ERP ID LABEL' (set to 'ERP LABEL').

### 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.

The screenshot shows the 'DIVISION SETUP' screen with a modal window titled 'UPDATE DIVISION - 1001' open. The modal has tabs for 'Details', 'Credit Card / ACH Processing', 'Cost / Target Pricing', 'Inter-company', and 'Addresses'. The 'Credit Card / ACH Processing' tab is active, and the 'ENABLE CREDIT CARD PROCESSING' dropdown is highlighted with a red box, set to 'Yes (Credit Card & ACH)'. Other fields in the modal include 'CREDIT CARD GATEWAY' (Pineapple), 'GATEWAY ENV' (SANDBOX), 'GATEWAY API KEY / USER NAME' (Pineapple\_DEMO), 'GATEWAY TRANS. KEY / PASSWORD' (PineappleExpress123!), 'GATEWAY SETTLEMENT TIME' (07 : 30 : 00 . 000 PM), and 'CREDIT CARD BANK ACCOUNT' (BANK OF MARYLAND).

## 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](#)).

To learn more about the configurations for the Payment Processing and the wallet, refer to the [Account Class Setup](#) article.

## 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"> <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>
Description	Option to add additional information associated to the payment method.

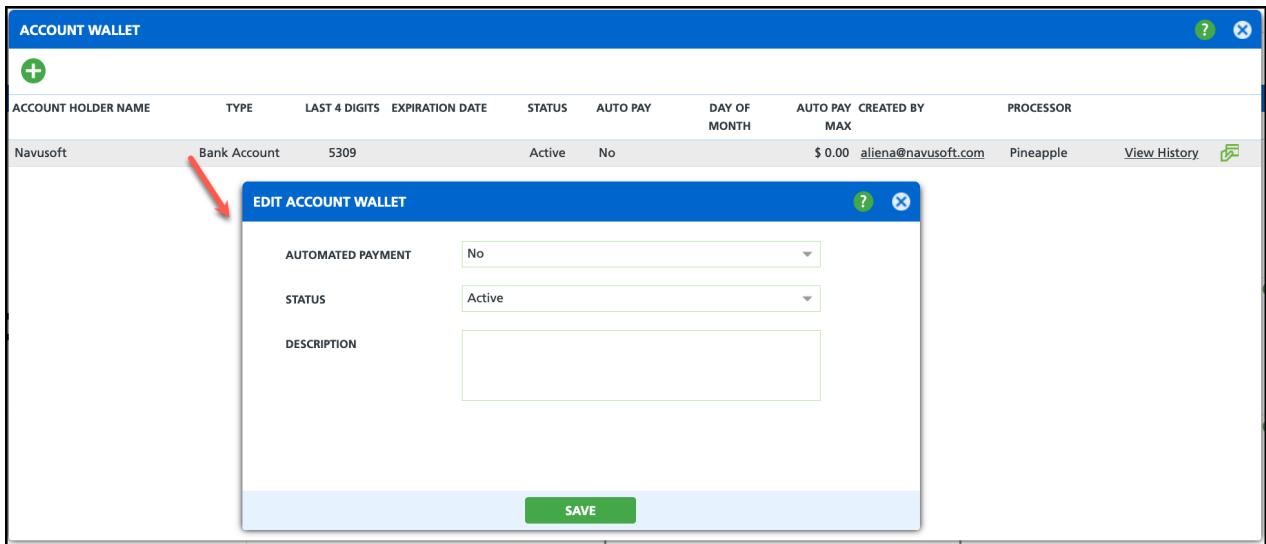
## Add Account Wallet

- 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.
- Select the green + icon to open Add Account Wallet popup window.
- 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
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"> <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>
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.