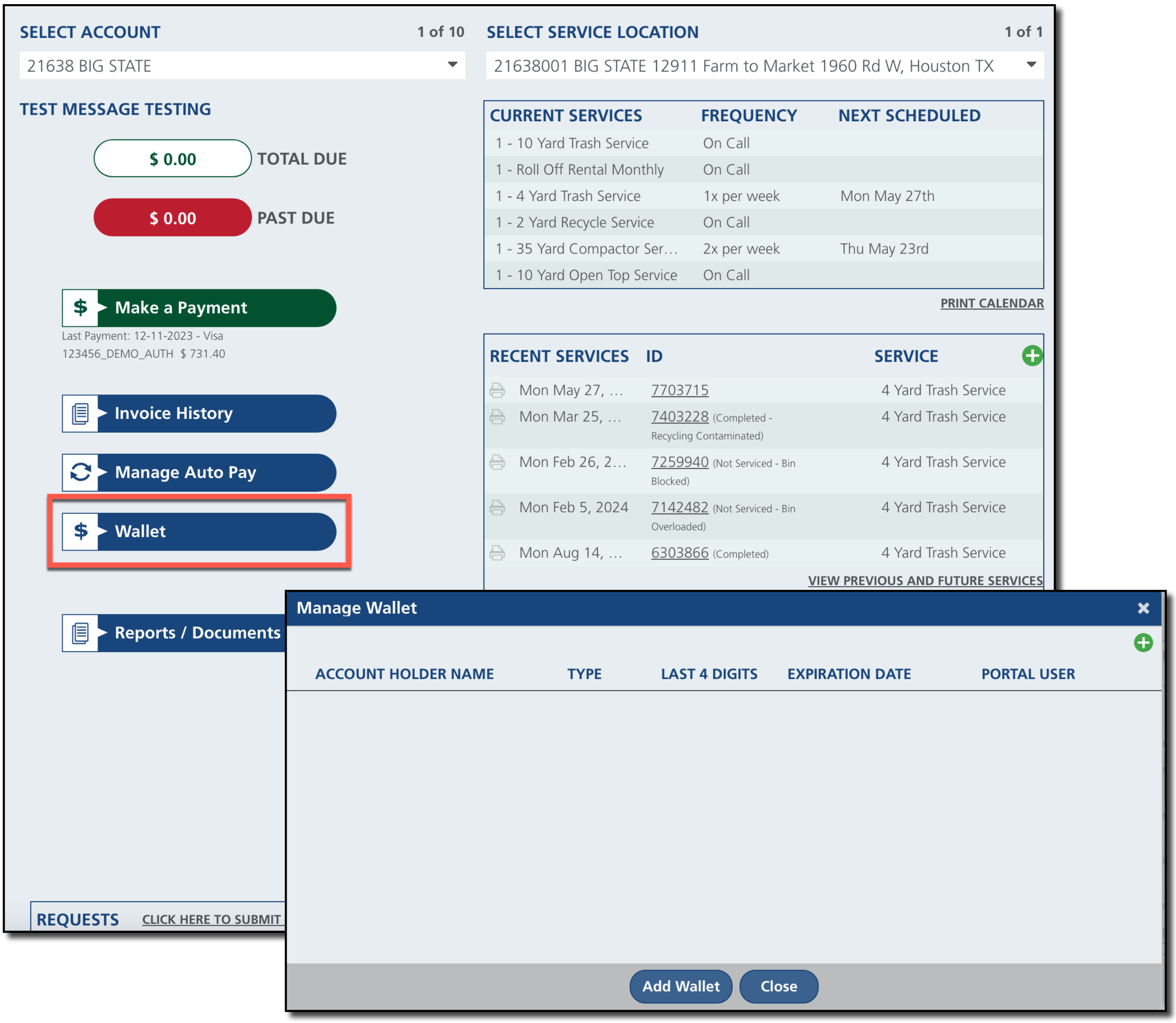
# Customer Portal - Wallet

Last Modified on 10/18/2024 11:37 am PDT

**Pathway:** *Customer Portal > Manage Wallet*

The Wallet feature displays all payment methods linked to an account, offering options to add new methods and remove any that are no longer required.



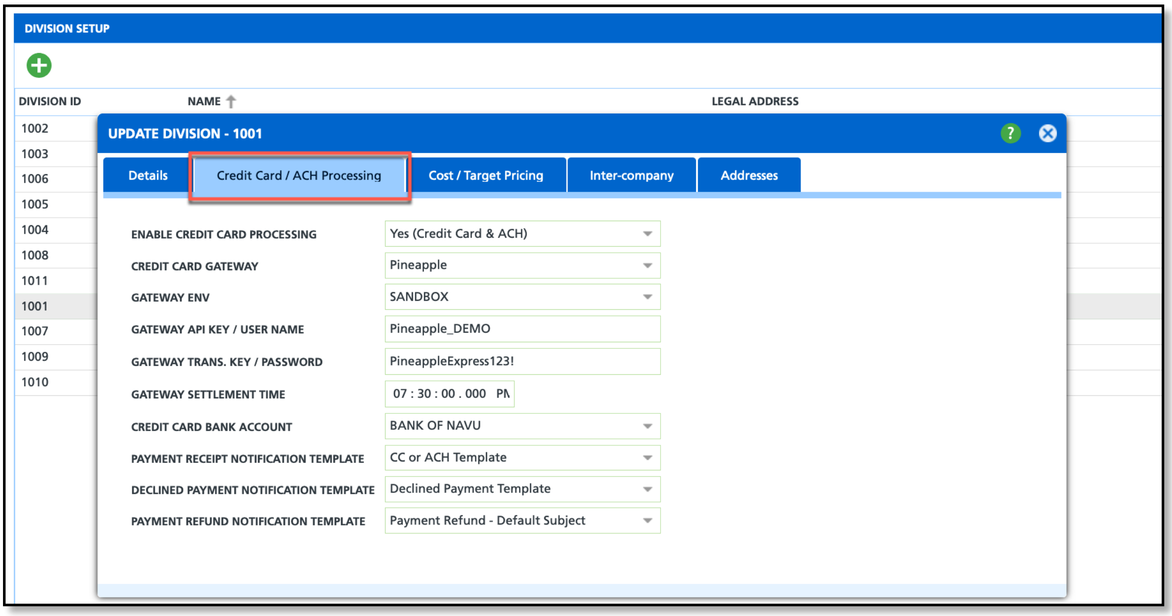

## Configurations in Setup

The following settings are required to enable the Wallet feature and manage payment methods:

### Division Settings

**Pathway:** *Setup > System > Division > Credit Card / ACH Processing (tab)*

Division Setup settings control how credit card and ACH transactions are processed, as well as customer access to manage their payment methods in Wallet.

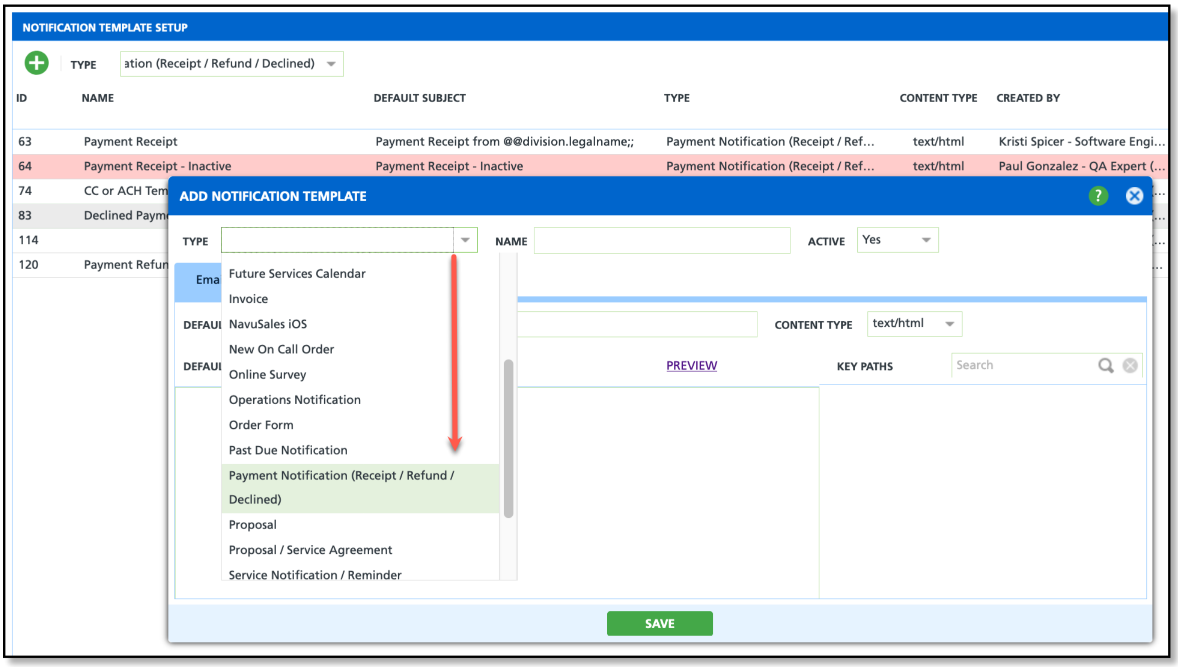



| Field | Setting |
|---|---|
| Enable Credit Card Processing | Set *'Enable Credit Card Processing'* to one of the available options:<br>• Yes (Credit Card & ACH)<br>• Yes (Credit Card Only<br><br>If this field is set to 'No,' the Add icon in 'Manage Wallet' will be hidden. |
| Credit Card Gateway | Select Pineapple. |
| Gateway Env | Controls if this is a testing environment or live.<br>• Production - Required to process customer transactions.<br>• Sandbox - Testing option. |
| Gateway API Key / User Name | Field to enter the Gateway API Key provided by Pineapple. |
| Gateway Trans. Key / Password | Field to enter the password provided by Pineapple. |
| Gateway Settlement Time | Indicates the settlement time for the payment batches. Any payments recorded after the time selected will be applied to the next day's payment batch. |
| Credit Card Bank Account | Select the bank account payments are to be sent to from the available options. |
| Payment Receipt Notification Template | Select the Payment Receipt Notification Template that will be emailed to the customer upon receipt of payment.<br>*Notification Templates are created in Setup > System > Notification Template* |
| Declined Payment Notification Template | Select a Declined Payment Notification Template that should be emailed to the customer in the event a payment is declined.<br>*Notification Templates are created in Setup > System > Notification Template* |
| Payment Refund Notification Template | Select a Payment Refund Notification Template that should be emailed to the customer in the event a payment is declined.<br>*Notification Templates are created in Setup > System > Notification Template* |

## Notification Template

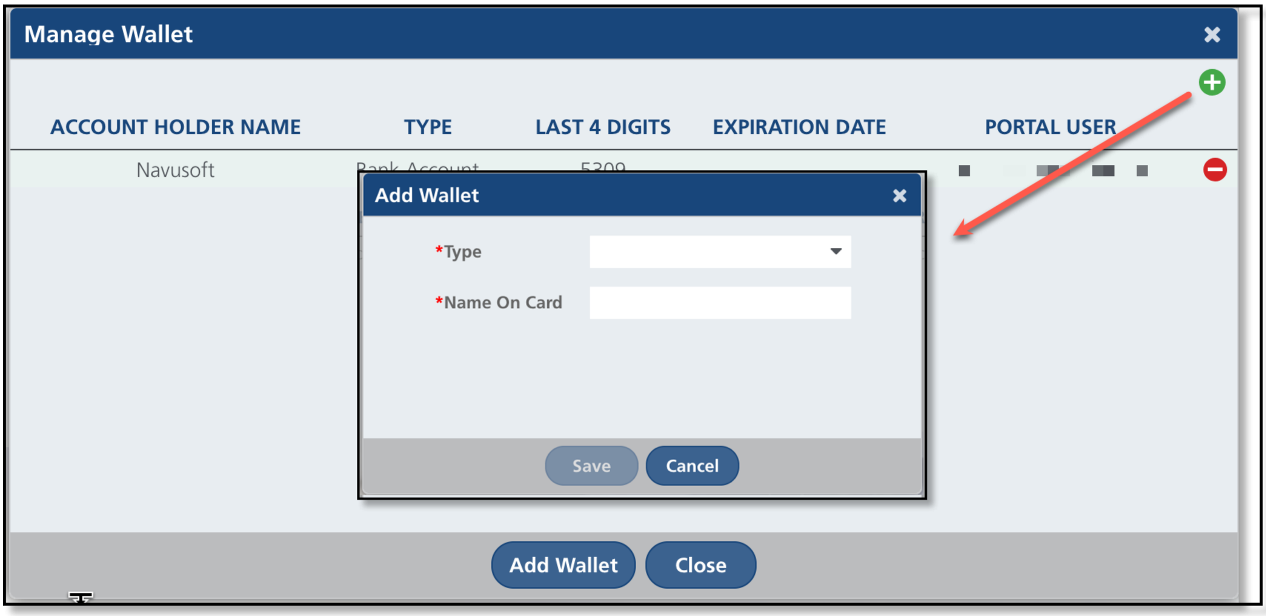
**Pathway:** *Setup > System > Notification Template*

Create notifications in Notification Template Setup that can be sent to the customer when a payment has been received, declined, or refunded.




| Field | Description |
|---|---|
| Type | Select the type that applies for the notification you are creating. Types that apply to Credit Card and payment processing include:<br>• Credit Card Expiration<br>• Payment Notification (Receipt / Refund / Declined) |
| Name | Enter a clear, easily identifiable name that will appear in the Payment Notification Template selection fields within Division Setup. |
| Active | Verify this field is set to 'Yes' so it is available for use. |
| Email Design | Create a custom email to be sent to the customer based on the notification's purpose. |
| Text Message Design | Create a custom text message to be sent to the customer based on the notification's purpose. |

## Manage Payment Methods




## Add Payment Method

1. Click the **green +** to open the 'Add Wallet' popup.
    - Select **Type** to identify the wallet as either a 'Credit Card' or 'Bank Account.'
    - Based on the selection, enter the details for the payment method.
    - Review the **'Accept Payment Terms and Conditions'** and select the check box when finished.
    - Click '**Save**' and the payment method is now available for use.

## Remove Payment Method

1. Click the **red -** to remove the payment method from Wallet.
    - After clicking the remove icon, a confirmation message will appear to ensure the user intends to remove the payment method.