

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.

The screenshot displays the 'Customer Portal - Wallet' interface. At the top, there are dropdown menus for 'SELECT ACCOUNT' (showing '21638 BIG STATE') and 'SELECT SERVICE LOCATION' (showing '21638001 BIG STATE 12911 Farm to Market 1960 Rd W, Houston TX'). Below these are sections for 'TEST MESSAGE TESTING' with '\$ 0.00 TOTAL DUE' and '\$ 0.00 PAST DUE', and a 'Make a Payment' button. A sidebar contains buttons for 'Invoice History', 'Manage Auto Pay', 'Wallet' (highlighted with a red box), and 'Reports / Documents'. The main area shows 'CURRENT SERVICES' and 'RECENT SERVICES' tables. A 'Manage Wallet' modal window is open, showing a table with columns: ACCOUNT HOLDER NAME, TYPE, LAST 4 DIGITS, EXPIRATION DATE, and PORTAL USER. The modal has 'Add Wallet' and 'Close' buttons at the bottom.

CURRENT SERVICES	FREQUENCY	NEXT SCHEDULED
1 - 10 Yard Trash Service	On Call	
1 - Roll Off Rental Monthly	On Call	
1 - 4 Yard Trash Service	1x per week	Mon May 27th
1 - 2 Yard Recycle Service	On Call	
1 - 35 Yard Compactor Ser...	2x per week	Thu May 23rd
1 - 10 Yard Open Top Service	On Call	

RECENT SERVICES	ID	SERVICE
Mon May 27, ...	7703715	4 Yard Trash Service
Mon Mar 25, ...	7403228 (Completed - Recycling Contaminated)	4 Yard Trash Service
Mon Feb 26, 2...	7259940 (Not Serviced - Bin Blocked)	4 Yard Trash Service
Mon Feb 5, 2024	7142482 (Not Serviced - Bin Overloaded)	4 Yard Trash Service
Mon Aug 14, ...	6303866 (Completed)	4 Yard Trash Service

ACCOUNT HOLDER NAME	TYPE	LAST 4 DIGITS	EXPIRATION DATE	PORTAL USER
---------------------	------	---------------	-----------------	-------------

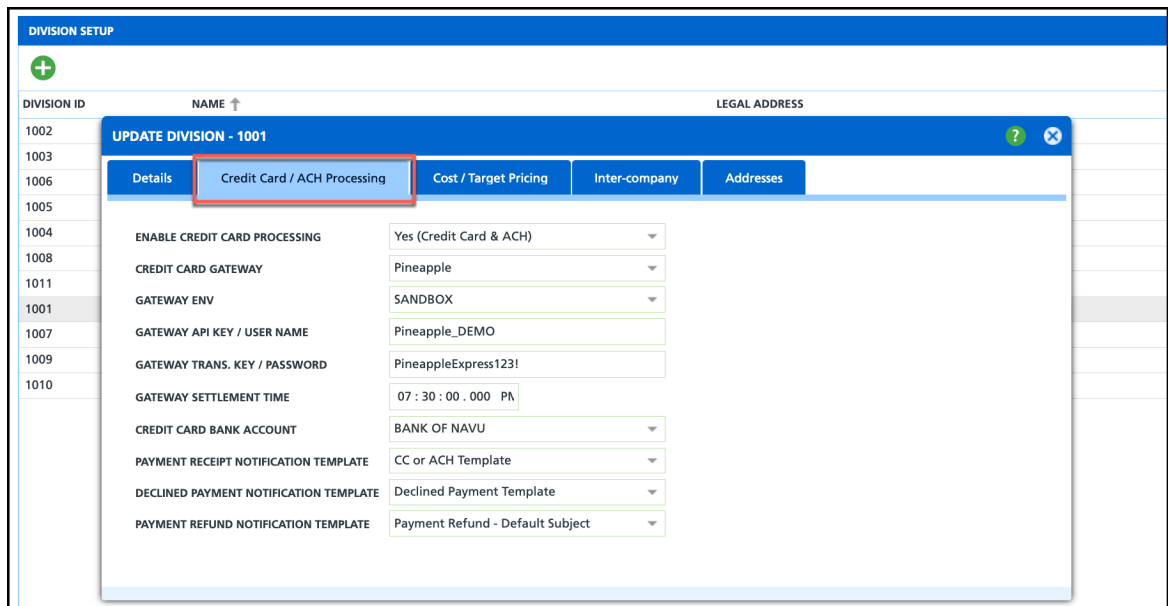
Configurations in Setup

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.



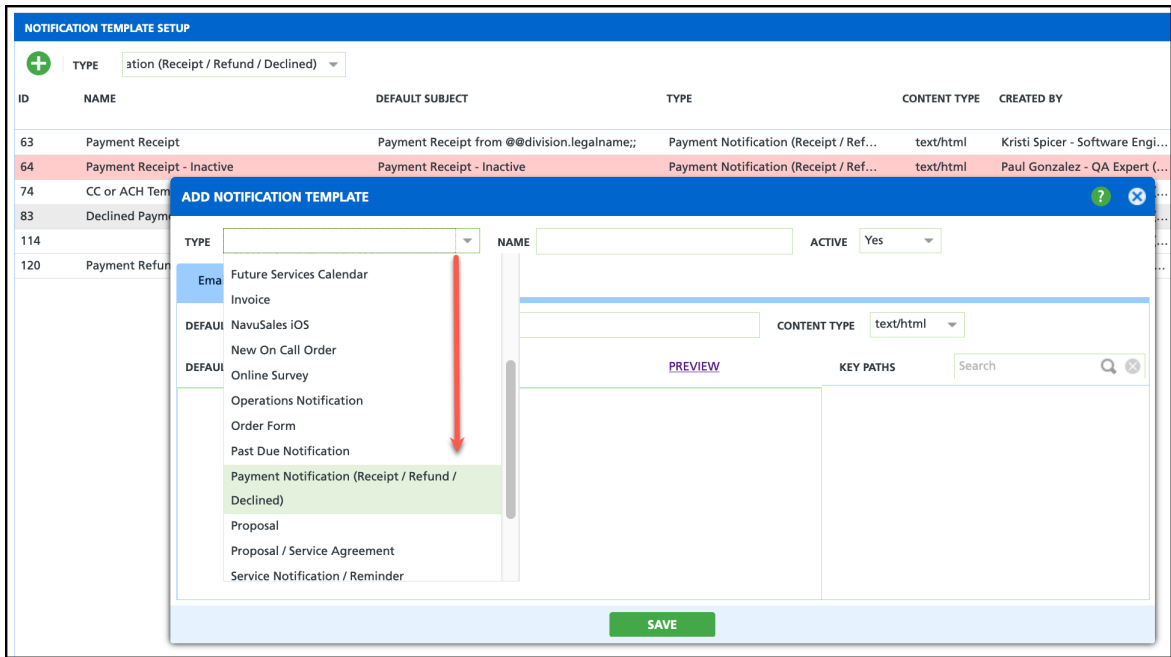
Field	Setting
Enable Credit Card Processing	<p>Set 'Enable Credit Card Processing' to one of the available options:</p> <ul style="list-style-type: none"> • Yes (Credit Card & ACH) • Yes (Credit Card Only) <p>If this field is set to 'No,' the Add icon in 'Manage Wallet' will be hidden.</p>
Credit Card Gateway	Select Pineapple.
Gateway Env	<p>Controls if this is a testing environment or live.</p> <ul style="list-style-type: none"> • Production - Required to process customer transactions. • 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	<p>Select the Payment Receipt Notification Template that will be emailed to the customer upon receipt of payment.</p> <p><i>Notification Templates are created in Setup > System > Notification Template</i></p>
Declined Payment Notification Template	<p>Select a Declined Payment Notification Template that should be emailed to the customer in the event a payment is declined.</p> <p><i>Notification Templates are created in Setup > System > Notification Template</i></p>
Payment Refund Notification Template	<p>Select a Payment Refund Notification Template that should be emailed to the customer in the event a payment is declined.</p> <p><i>Notification Templates are created in Setup > System > Notification Template</i></p>

Notification Template

Pathway: Setup > System > Notification Template

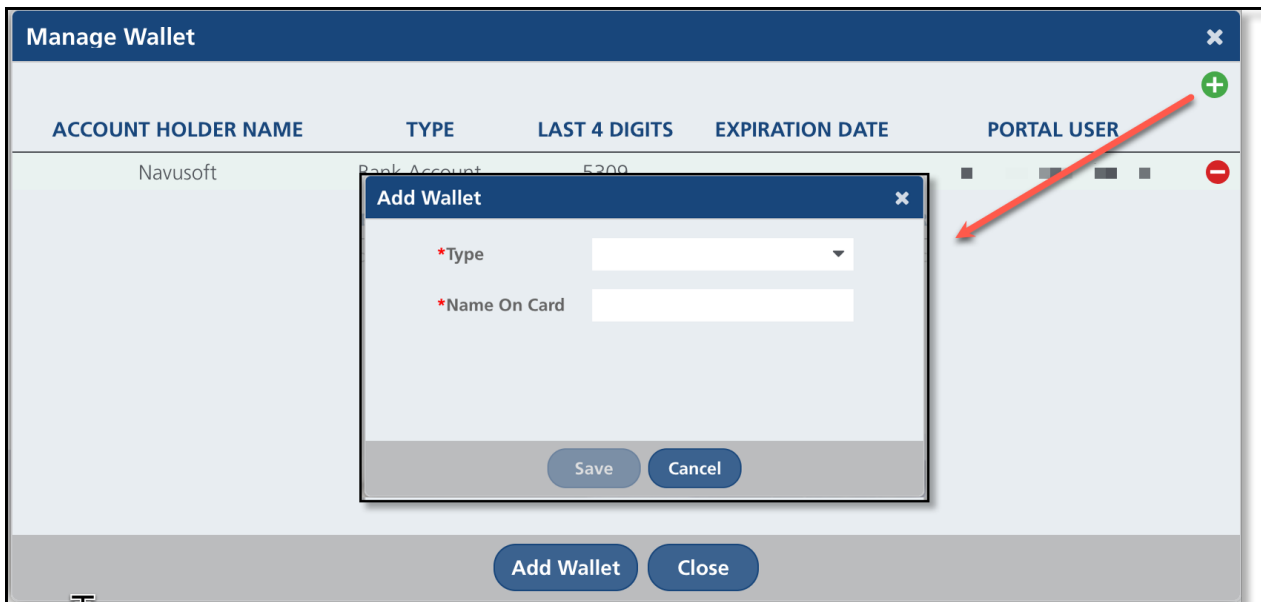
Create notifications in Notification Template Setup that can be sent to the customer when a payment has

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: <ul style="list-style-type: none"> • Credit Card Expiration • 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.