

# Customer Portal - Wallet

Last Modified on 06/24/2026 2:36 pm PDT

Pathway: [Customer Portal](#) > [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feature displays all payment methods linked to an account, offering options to add new methods and remove any that are no longer valid.

The screenshot displays the 'Customer Portal - Wallet' interface. At the top, there are dropdown menus for 'SELECT ACCOUNT' (21638 BIG STATE) and 'SELECT SERVICE LOCATION' (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, ...	<a href="#">7703715</a>	4 Yard Trash Service
Mon Mar 25, ...	<a href="#">7403228</a> (Completed - Recycling Contaminated)	4 Yard Trash Service
Mon Feb 26, 2...	<a href="#">7259940</a> (Not Serviced - Bin Blocked)	4 Yard Trash Service
Mon Feb 5, 2024	<a href="#">7142482</a> (Not Serviced - Bin Overloaded)	4 Yard Trash Service
Mon Aug 14, ...	<a href="#">6303866</a> (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.

DIVISION SETUP SETUP > SYSTEM > DIVISION

Search

DIVISION ID	NAME ↑	LEGAL ADDRESS	PHONE	TOLL FREE PHONE	EMAIL	DIVISION GROUP
1012	Conno...	123 Street Rd Kennett 5...	+1 215-264-9812		noreply@navusoft.com	
1002	CORPUS	PO BOX 260119 Corpus ...	+1 361-289-5588	+1 800-555-6513	noreply@navusoft.com	

**UPDATE DIVISION - 1006**

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 555000000001

ECHECK/ACH MERCHANT ID BCX200134583642

ECHECK/ACH REPORTING MID ID

ECHECK/ACH REPORTING USER NAME

ECHECK/ACH REPORTING PASSWORD

**Card Present**

PROCESSOR None ▾

WAIT FOR TERMINAL TIMEOUT (SEC) 60

ENABLE NON-INTEGRATED CREDIT CARD TERMINAL No ▾

ENABLE CARD-NOT-PRESENT ON SCALE No ▾

SETTLEMENT TIME 11:35 PM ⌚

CREDIT CARD BANK ACCOUNT COMERICA - FWS ▾

PAYMENT RECEIPT NOTIFICATION TEMPLATE Payment Receipt ▾

DECLINED PAYMENT NOTIFICATION TEMPLATE Declined Payment Template ▾

PAYMENT REFUND NOTIFICATION TEMPLATE Payment Refund - Default Subject ▾

CHARGEBACK NOTIFICATION TEMPLATE ▾

Field	Description and Use
<b>Card Not Present</b>	
<p><b>Enable</b> <i>Required</i></p>	<p>Selections here affect the display of the Wallet and Payment features in the Customer Portal.</p> <p>If 'No' is selected, payment features are not displayed.</p> <p>Options include:</p> <ul style="list-style-type: none"> <li>• <b>Yes (Credit Card &amp; ACH)</b> - Customers can add a credit card or bank routing information to wallet, or make a payment with either option.</li> <li>• <b>Yes (Credit Cards Only)</b> - Customers can only add a credit card to wallet, or make a payment with a credit card.</li> <li>• <b>No</b> - Wallet is not available.</li> </ul>
<p><b>Processor</b> <i>Required</i></p>	<p>Select CardPointe Processor from the drop-down.</p>
<p><b>Environment</b></p>	<p>Select the type of environment this is being set up for:</p> <ul style="list-style-type: none"> <li>• Production - Required to process live customer transactions.</li> <li>• Sandbox - Testing option.</li> </ul>
<p><b>API Key / User Name</b> <i>Required</i></p>	<p>Enter the API Key provided by CardPointe.</p>

<b>Trans. Key / Password</b> <i>Required</i>	Enter the password provided by CardPointe.
<b>Credit Card Merchant ID</b>	Enter the identification number for the credit card provided by CardPointe.
<b>eCheck / ACH Merchant ID</b>	Enter the identification number for the bank account provided by CardPointe. If something is entered here, then the following fields are displayed: <ul style="list-style-type: none"> <li>• eCheck / ACH Reporting Mid ID</li> <li>• eCheck / ACH Reporting User Name</li> <li>• eCheck / ACH Reporting Password</li> </ul>
<b>Card Present</b>	
<b>Wait for Terminal Timeout (Sec)</b>	Specifies how long the system will wait for a response from the credit card terminal before timing out. If the terminal does not respond within the defined number of seconds, the transaction will be canceled and may need to be retried.
The rest of the fields in the Card Present section are relevant to <a href="#">Card Present - Credit Card Terminal Setup</a> .	
<b>Bottom section</b>	
<b>Settlement Time</b> <i>Required</i>	The settlement time for the payment batches. Any payments recorded after the time selected will be applied to the next day's payment batch.
<b>Credit Card Bank Account</b>	Select the bank account that payments are to be sent to. <i>Bank Accounts are created in Setup &gt; Accounting &gt; Bank Account</i>
<b>Payment Receipt Notification Template</b> <i>Required</i>	Select the template that will be emailed to the customer upon receipt of payment. <i>Notification Templates are created in Setup &gt; System &gt; Notification Template</i>
<b>Declined Payment Notification Template</b> <i>Required</i>	Select the template that should be emailed to the customer in the event a payment is declined. <i>Notification Templates are created in Setup &gt; System &gt; Notification Template</i>
<b>Payment Refund Notification Template</b> <i>Required</i>	Select the template that should be emailed to the customer in the event a payment is declined. <i>Notification Templates are created in Setup &gt; System &gt; Notification Template</i>
<b>Chargeback Notification Template</b> <i>Required</i>	Select the template that should be emailed to the customer in the event of a chargeback. <i>Notification Templates are created in Setup &gt; System &gt; Notification Template</i>

## Notification Template

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

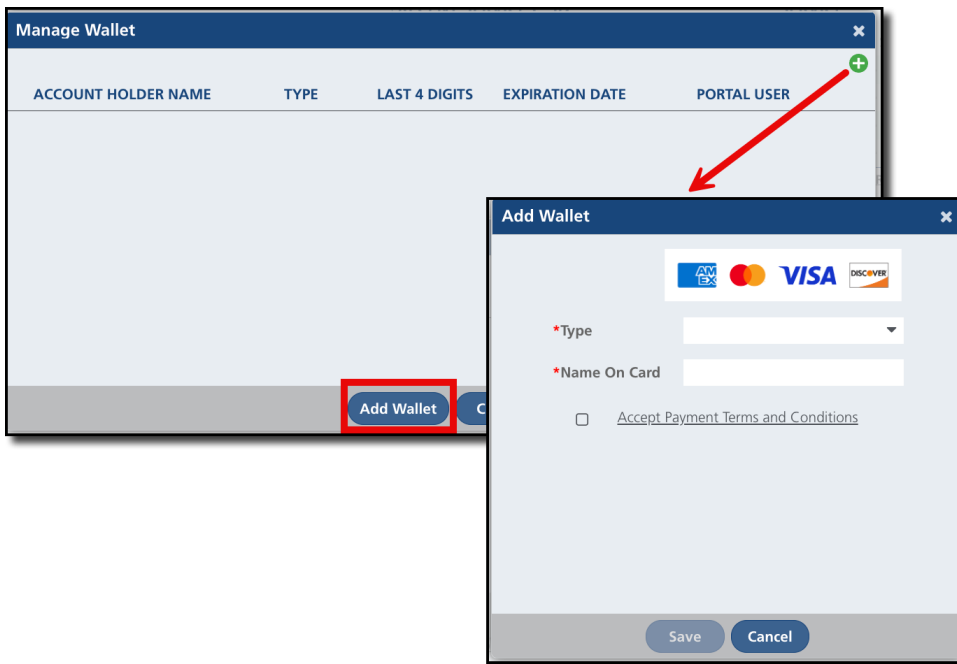
Create notifications in Notification Template Setup that can be sent to the customer when a payment has been received, declined, or refunded.

ID	NAME	DEFAULT SUBJECT	TYPE	CONTENT TYPE	CREATED BY
63	Payment Receipt	Payment Receipt from @@division.legalname;;	Payment Notification (Receipt / Ref...	text/html	Kristi Spicer - Software Engi...
64	Payment Receipt - Inactive	Payment Receipt - Inactive	Payment Notification (Receipt / Ref...	text/html	Paul Gonzalez - QA Expert (...)
74	CC or ACH Tem				
83	Declined Paym				
114					
120	Payment Refur				

Field	Description
<b>Type</b>	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"> <li>• Credit Card Expiration</li> <li>• Payment Notification (Receipt / Refund / Declined)</li> </ul>
<b>Name</b>	Enter a clear, easily identifiable name that will appear in the Payment Notification Template selection fields within Division Setup.
<b>Active</b>	Verify this field is set to 'Yes' so it is available for use.
<b>Email Design</b>	Create a custom email to be sent to the customer based on the notification's purpose.
<b>Text Message Design</b>	Create a custom text message to be sent to the customer based on the notification's purpose.

## Manage Payment Methods

The following process outlines how a portal user can add or remove payment methods in the Manage Wallet section of the Customer Portal.



### Add Payment Method

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

### Remove Payment Method

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

## From Portal to Office: Application Visibility

Adding a type of payment to the wallet from the Customer Portal behaves identical to [Add Payment Method](#).

Whether payment methods are added from the application or from the portal, the wallet can be viewed from the AR History screen.

### AR History - Wallet

AR HISTORY
?
✕

CURRENT	1-30 DAYS	31-60 DAYS	61-90 DAYS	91-120 DAYS	120+ DAYS	TOTAL
-173.96	0.00	0.00	634.48	2,855.16	5,761.43	9,077.11

Limit to open items |
 STATEMENT ▾
INVOICE
AUTO APPLY
BALANCE WRITE OFF
✎
WALLET (1)
🔍
Search
🔄

DATE ↓	DUE DATE	PERIOD	SITE ID	TYPE	REFERENCE NO	AMOUNT	APPLIED AMOUNT	BALANCE
02/01/26	02/21/26	2026-02		Invoice	955141	634.48	634.48	634.48

ACCOUNT WALLET
?
✕

+

ACCOUNT HOLDER NAME	TYPE	LAST 4 DIGITS	EXPIRATION DATE	STATUS	AUTO PAY	DAY OF MONTH	AUTO PAY CREATED BY	PROCESSOR
Joe Smith	Visa	1111	10/26	Active	No		MAX	CardPointe <a href="#" style="color: green;">View History</a> <span style="color: green;">✎</span>

## Related Articles

- [Make a Payment](#)
- [Manage Autopay](#)
- [Access Invoice History](#)