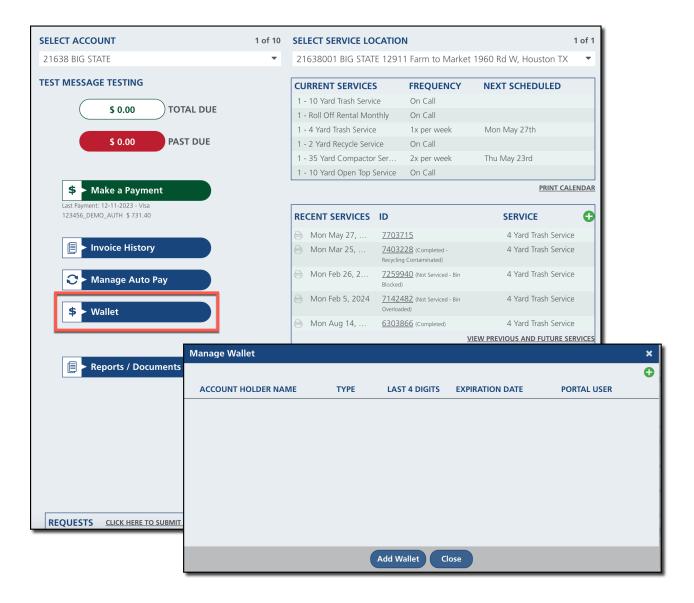# Customer Portal - Wallet

Last Modified on 07/01/2024 11:12 am EDT

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

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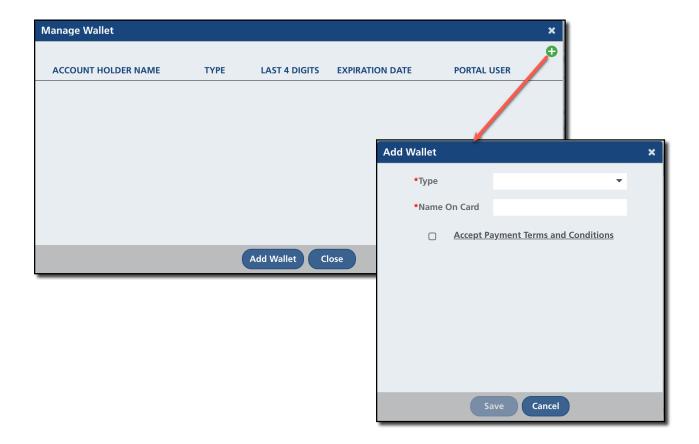


## Manage Wallet

| Field | Description |
| --- | --- |
| Account Holder Name | Displays the name of the account holder for the payment method. |
| Type | Displays if the payment method is Credit Card or Bank Account. |
| Last 4 Digits | Displays the last four digits of the credit card or bank account. |

| | |
|---|---|
| **Expiration Date** | Displays the Credit Card expiration date if credit card is used. Otherwise displays blank. |
| **Portal User** | Displays the name of the customer portal user who set up the payment method. |

## Add or Remove a Wallet



### Add

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 wallet.
   - Review the **'Accept Payment Terms and Conditions'** and select the check box when finished.
   - Click **'Save'** and the wallet is now available for use.

### Remove

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