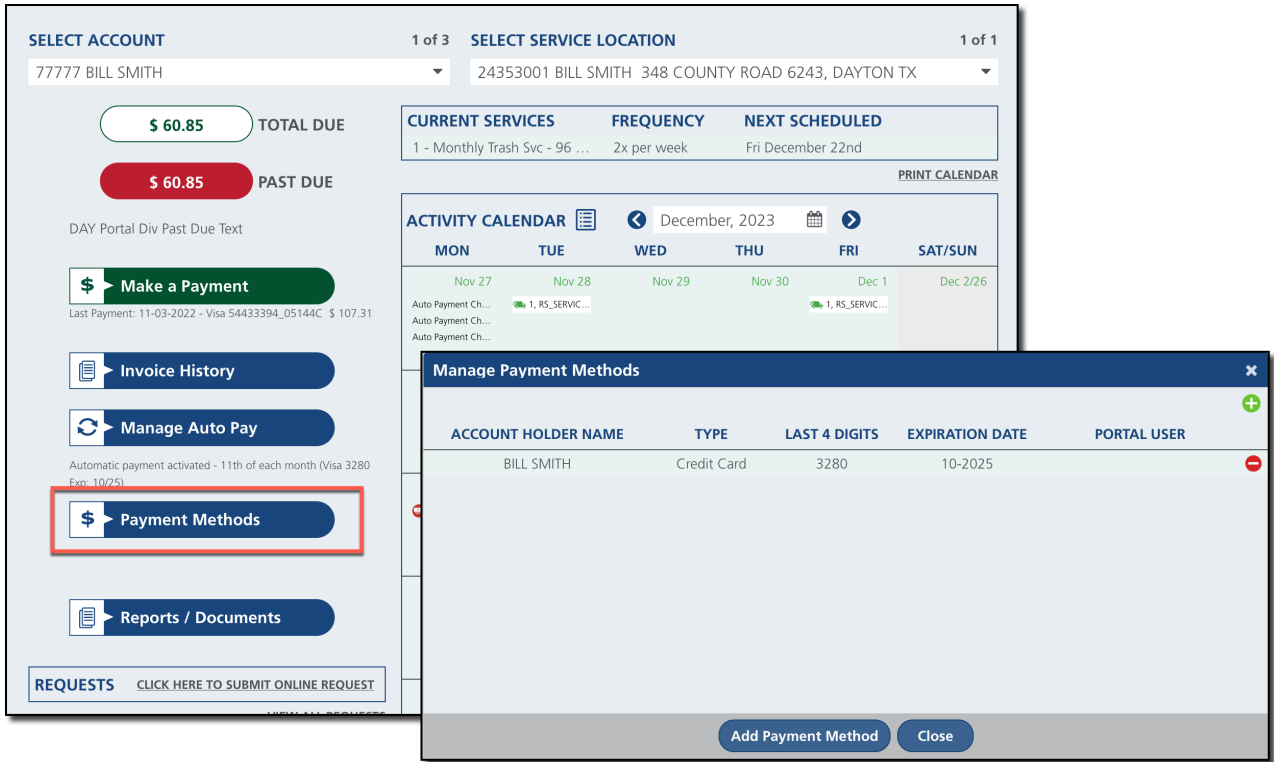


Customer Portal - Payment Methods

Last Modified on 01/02/2024 12:25 pm EST

Pathway: *Customer Portal > Manage Payment Methods*

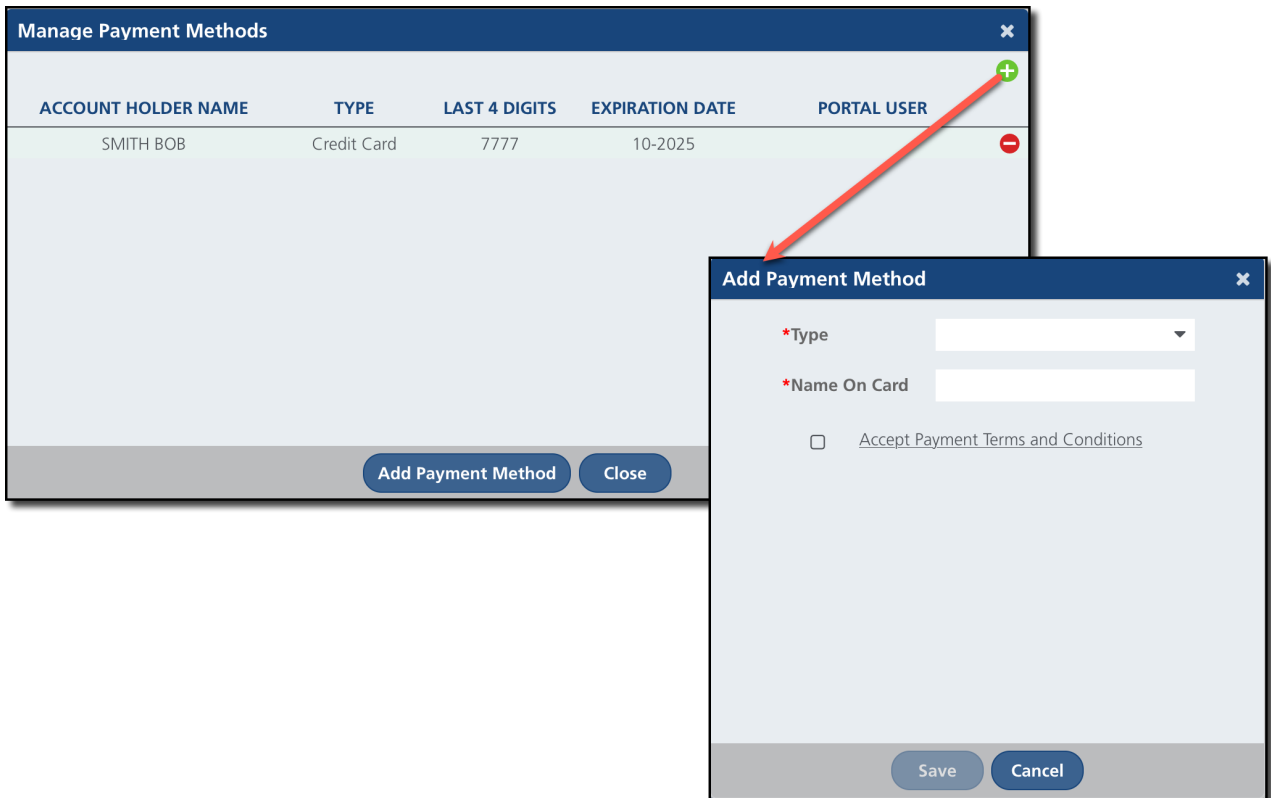
The Manage Payment Methods screen displays all payment methods linked to an account, offering options to add new methods and remove any that are no longer required.



Manage Payment Methods

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 Payment Method



Add

1. Click the **green +** to open the 'Add Payment Method' popup.
 - Select **Type** to identify the payment method 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

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