

# Payment Methods

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Exciting news! Our ConnectBooster Support documentation is moving to a new location. Be sure to bookmark the new link below.

<https://help.cb.kaseya.com/help/Content/0-HOME/Home.htm>

On the Organization Profile, the "Payment Methods" section lists all credit cards or bank accounts on file for a given client.

- Clicking on "NEW" will allow entry of a Credit Card, or other supported form of payment.
- Clicking "Manage + Edit" will require re-entry of ALL payment information (regardless of type).

## Payment Methods

+ New

Type	Friendly Name	Expiration (MM/YY)	Last 4	
	Test MC	12/23	1111	<b>Manage</b> <small>EDIT</small>
	Jane Smith	–	xx66	<b>Manage</b> <small>EDIT</small>
	Test Carder	12/20	1111	<b>Manage</b> <small>EDIT</small>

Click or tap to toggle between the Credit Card or ACH (Bank Account) options, and then proceed with "Next".

1 New Payment Method — 2 Credit Card — 3 Address — 4 Summary

Credit Card

Bank Account

*\*I agree that I am forfeiting my cash/ACH discount by making this payment by Credit Card*

Cancel

Next

The "Friendly Name" is simply the title of the payment information for easy recognition used by the portal.

- Ex. "Bob's Primary Card" or "Mary's Business Visa"
- Be sure to click "Next" when all the fields are valid.

1 New Payment Method — 2 Credit Card — 3 Address — 4 Summary

<b>Friendly Name</b> Primary Business	<b>First Name</b> Stan	<b>Last Name</b> Marsh
Name used by portal	Your first name	Your last name
<b>Credit Card Number</b> 3782 822463 10005	<b>Month Expiration</b> 12	<b>Year Expiration</b> 26
Number on your credit card	Your credit card month expiration	Your credit card year expiration

Fill in the address information if required.

1 New Payment Method — 2 Credit Card — 3 Address — 4 Summary

<b>Address</b> 123 N South Park Ave	<b>Phone Number</b> 	
Billing Address	Account/Card Holder Phone Number	
<b>Address Line 2</b> 	<b>Email Address</b> stantest@gmail.com	
Billing Address Line 2	Account/Card Holder Email	
<b>City</b> South Park	<b>State/Province</b> CO	<b>Postal Code</b> 80440
Billing Address City	Billing Address State/Province	Billing Address Postal Code

Check-mark the box to authorize the addition of the payment method. NOTE: Clicking "Submit" does NOT process a transaction!

1 New Payment Method — 2 Credit Card — 3 Address — 4 Summary

**Summary**

 <p>378282246310005 STAN MARSH 12/26</p>	<p>ADDRESS 123 N SOUTH PARK AVE SOUTH PARK CO 80440</p> <p><input checked="" type="checkbox"/> I authorize the use of this payment method to settle transactions in this portal.</p>
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Once submitted, you should see a success confirmation that the payment method was added.

This is then stored in the secure, PCI compliant, *Customer Vault\**.

- This allows repeated use of the payment method, without re-entry (*needed for AutoPay!*)
- The native data in the vault is inaccessible by you or us (*full account numbers are not visible*).
- Clients can also update/modify entries from their portal perspective (*if permitted*)

*\*This is when your merchant processing account is setup through the BNG Gateway.*

ACH Form:

1 New Payment Method — 2 Bank Account — 3 Address — 4 Summary

Friendly Name	Routing Number	Confirm Routing Number	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Name used by portal	Bank routing number	Confirm bank routing number	
Account Name	Account Number	Confirm Account Number	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Account Holder's Name	Bank account number	Confirm bank account number	
Account Holder Type		Account Type	
<input type="radio"/> Business	<input type="radio"/> Personal	<input type="radio"/> Checking	<input type="radio"/> Savings