

Payment Methods

Last Modified on 03/06/2019 11:42 am CST

On the Customer 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 "EDIT" will require re-entry of ALL payment information (regardless of type).

TYPE	FRIENDLY NAME	EXPIRATION (M/M/YY)	LAST 4	
	Test MC	02/30	5100	MANAGE ⋮
	Rusty Shackelford	04/30	1117	MANAGE ⋮
	Elmer Fud's Main Checking	--	xx56	MANAGE ⋮
	Primary Amex	06/22	1115	MANAGE ⋮
	Testy Testerson	12/24	1111	MANAGE ⋮

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

NEW PAYMENT METHOD

CREDIT CARD

BANK ACCOUNT


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", "Mary's Business Visa"
- Be sure to click "Next" when all the fields are valid.

CREDIT CARD

Friendly Name  Credit Card Number

Primary Amex 375811111111115 

First Name Last Name Month Expiration Year Expiration

Randy Marsh 06 2022



Card Reader

Off On



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Fill in the address information if required.




CREDIT CARD

Address  Phone Number 

28201 E. Bonanza St.

Address Line 2  Email Address 

randymarsh@gmail.com

City  State/Province  Postal Code 


South Park CO 80440

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

CREDIT CARD

Summary



3758 111111 11115
RANDY MARSH 06 / 2022

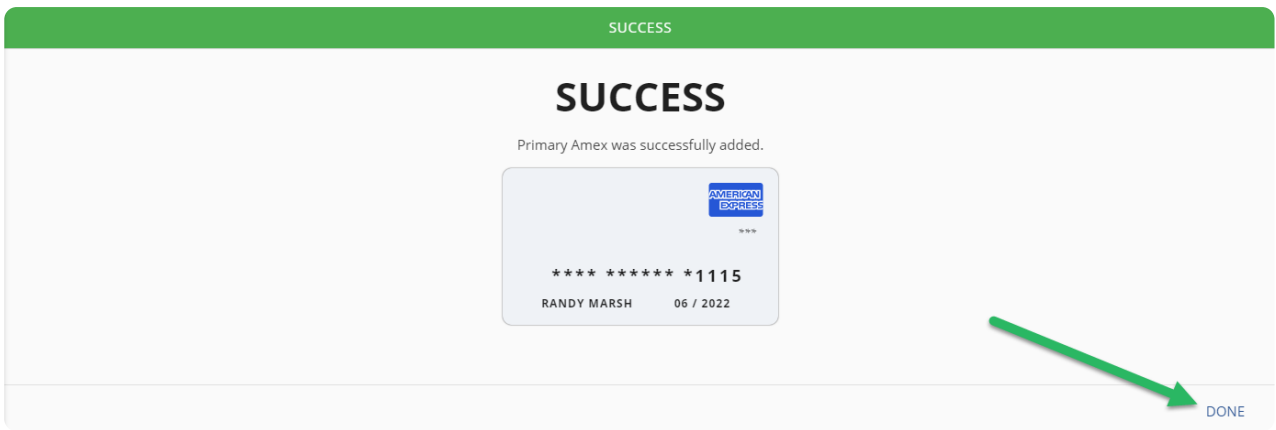
ADDRESS
**28201 E. BONANZA ST.
SOUTH PARK, CO 80440**

I authorize the use of this payment method to settle transactions in this portal.

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[SUBMIT](#)

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 with us, through the BNG Gateway.*

ACH Form:

BANK ACCOUNT

Friendly Name

Account Name

Routing Number

Account Number

Confirm Routing Number

Confirm Account Number

Account Type: Checking Savings

Account Holder Type: Business Personal

CANCEL

The **"CARD READER"** feature is a secure and encrypted way to enter payment information with physical hardware.

- Negates the need to type card information via a keyboard, offsetting risk of key-loggers.
- *Please contact us if you would like to learn more!*