

Payment Methods

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This section allows you to select which Payment Methods are globally accepted in the portal.

- Credit Card
- BankAccount (ACH/EFT)

AutoPay
Billing
Internal Settings
Client Users
Client Emails
Service
Api Keys

PAYMENT METHODS

✓ CreditCard

✓ Use payment adjustment for this method

⚠ IMPORTANT: Consumer laws regarding convenience fees on purchases vary region by region. We strongly recommend that you consult your legal council before activating and defining your message in this module.

Percent: 3 Charge Credit

Invoice Item: CC Fee Invoice Item Account: Sales - Support and Maintena..

Invoice Description: Cash/Check Payment Discount Forfeit Amount

Prefix Reference #: CS

✓ Enable for Autopay

✓ BankAccount

Disabling a form of payment will hide any preexisting credit cards or bank accounts on file. Clients will not be able to see or select them for payment or updating uses.

Any preexisting AutoPay rules *will still continue to function*, even if the payment method option is turned off.

Payment Adjustment

Please contact support if you would like details on how to turn on the invoice % adjustment feature.