

Adding Payment Methods

Registered customers can add and save payment methods in order to streamline the payment process or register for AutoPay or Pay by Text.

1. From the Customer Portal home screen user selects **My Profile** and **Payment Methods**.

TRAINING - TEST

My Account My Profile Support

Payment Methods

- Update Account Info
- Update Email Address
- AutoPay
- Paperless
- Pay by Text
- Recurring Scheduled Payments
- Linked Accounts
- Change Password

Your Account at a glance

I want to...

Pay my invoices

- View my payment history
- View my scheduled payment history
- Manage my AutoPay settings
- Manage my Paperless settings
- Update my account information

Recent Open Invoices

| Due On | Invoice Date |
|-----------|--------------|
| 3/30/2019 | 3/1/2019 |

Recent Closed Invoices

No history available

2. The **Saved Payment Methods** page displays to allow the user to select the desired type of payment method. In this example, the user will select **Add New Bank**.

Saved Payment Methods

Manage your Payment Methods

- + Add New Credit Card
- + Add New Bank

| Date/Time Added (CST) | Summary |
|-----------------------|--|
| 4/8/2019 | 056008849 / XXXXX6789 ★ Your Default Bank Name - USA Bank |

Edit Delete

- The **Add New Bank** page appears. The user completes the following information: Bank Name, 9-digit routing number, bank account number (entered twice to decrease error), account type (Personal-Checking, Personal-Savings, Commercial-Checking). User can select the **Default** box to ensure this payment information takes precedence when the user selects or sets up AutoPay and Pay by Text. User selects **Save Bank Information**.

[← Return to previous page](#)

New Bank

Please fill out all fields below and click Save Bank Information to save your information. [Need help filling out this information?](#)

Bank Name *

Bank Routing/ Transit *

Bank Account Number *

Confirm Bank Account Number *

Account Type *

Default

[✓ Save Bank Information](#)

- The **Saved Payment Methods** page appears showing the saved banking payment method. Part of the account number is masked for security purposes. There are two action buttons, one to **Edit** and one to **Delete**.

Saved Payment Methods

Manage your Payment Methods

[+ Add New Credit Card](#)
[+ Add New Bank](#)

| Date/Time Added (CST) | Summary | Edit Delete |
|-----------------------|--|--|
| 4/8/2019 | 056008849 / XXXXX6789 ★ Your Default Bank Name - USA Bank | Edit Delete |

You are currently not set up for AutoPay. You may setup AutoPay by clicking [here](#)

- To add a card payment method, select **Add New Credit Card**.

Saved Payment Methods

Manage your Payment Methods

[+ Add New Credit Card](#)

[+ Add New Bank](#)

| Date/Time Added (CST) | Summary | Edit Delete |
|-----------------------|--|--|
| 4/8/2019 | 056008849 / XXXXX6789 ★ Your Default Bank Name - USA Bank | Edit Delete |

- User enters the card number, selects the month and year of the card expiration date and enters the complete billing address associated with the card. User can select the **Default** box to ensure this payment information takes precedence when the user selects or sets up AutoPay and Pay by Text. User selects **Save Credit Card Information**.

New Credit Card

Please fill out all fields below and click Save Credit Card Information to save your information. [Need more information?](#)

Credit Card Number *

Expiration Date *

April ▼

2019 ▼

Billing Address *

Country *

United States ▼

Billing City *

State *

Select State ▼

Zip *

Default



✓ Save Credit Card Information


7. The saved payment methods are displayed. If the **Default** was not checked, the payment method entered first will be marked as default and can easily be changed by clicking on **Edit** and selecting a new default payment method. Multiple payment methods for credit card and bank account can be added the customer's profile at any time.

Saved Payment Methods

Manage your Payment Methods

[+ Add New Credit Card](#)
[+ Add New Bank](#)

| Date/Time Added (CST) | Summary | |
|-----------------------|---|--|
| 4/8/2019 |  056008849 / XXXXX6789 ★ Your Default Bank Name - USA Bank | Edit Delete |
| 4/8/2019 |  XXXXXXXXXXXX4444 Expires 4/2019 | Edit Delete |

 You are currently not set up for AutoPay. You may setup AutoPay by clicking [here](#)