Account Payment Methods Screen

Payments · https://learn.logisense.com/docs/338329789/

Last verified with: 10.8.6.0

Account Payment Methods are configured in Account / Overview / Payment Method. This screen will only be available if LogiSense Billing has been integrated with a Payment Gateway.

Overview

The Account Payment Methods screen is used to review, add, and manage payment methods for an account. Payment methods stored here can be used for manual payment collection and, when appropriate, for automatic payment collection through bill runs.

The fields shown on this screen can vary depending on the selected payment gateway and payment type. Some gateways support direct entry of card or ACH details, while others rely on token-based payment methods, merchant-account selection, or hosted payment fields.

This means two users may see slightly different payment-entry behavior depending on how the payment gateway has been configured for the owner and account.

The Payment Methods Panel

The Payment Methods Panel on the left allows you to select an existing payment method so that its details can be reviewed on the panel to the right.

Each row shows the payment method name, payment type, and whether the method is currently active. If a payment method is enabled for automatic payment collection, the row also shows an **Auto Pay** indicator.

Actions

Icon	Description

	Deletes the selected payment method from the account
	Adds a payment method to the account

Payment Method List

The payment method list helps you quickly identify:

- the **Name** of the payment method
- the payment type, such as credit card or ACH
- whether the payment method is **Active** or inactive
- whether the payment method is marked for **Auto Pay**

Selecting a payment method loads its details into the Edit Payment Method Panel.

The Edit Payment Method Panel

The information in this panel reflects the currently selected payment method. From here you can review payment-method details and, where permitted, update the existing configuration.

Common Fields

The following fields are used broadly across payment-method types:

- **Name**: a user-friendly name for the payment method.
- **Active**: controls whether the payment method can be used for future payment activity.
- **Auto Pay**: indicates that the payment method can be used for automatic payment collection. Only one payment method on an account should normally be designated for this purpose at a time.
- **Gateway**: identifies the payment gateway used for the payment method.
- **Payment Type**: identifies the base payment method type, such as credit card or ACH.
- **Description**: allows you to record additional notes about the payment method.

Gateway-Specific Fields

Some fields only appear for certain gateway configurations.

- **Merchant Account**: may appear when the selected payment gateway requires a merchant account selection. This is most relevant for payment-gateway configurations that support multiple merchant accounts.
- **Payment Method Token**: may appear for token-based payment methods. In these cases, the payment method is stored using a token provided by the payment gateway rather than by directly storing full payment details on the screen.
- **Deactivation Reason**: may be used when an existing payment method is inactive and the reason for deactivation should be recorded.

Saved Method Details

For existing payment methods, the screen can display masked identifier information to help users confirm which saved method they are looking at.

Examples include:

- a masked card number for a saved credit card
- a masked account number for a saved bank account
- an expiry date for supported credit-card payment methods

Credit Card Payment Method Details

When the selected payment type is **Credit Card**, the screen can display a cardholder section, secure card-entry fields, expiry fields, and billing-address fields.

Common credit-card details include:

- **First Name** and **Last Name**: the cardholder name.
- **Credit Card Number**: the card number. Depending on the gateway, this may use secure hosted fields rather than a regular text box.
- **CVV**: the card security code. Depending on the gateway and card type, this may be required and may also use a secure hosted field.
- **Expiry Month** and **Expiry Year**: the card expiry values used when creating the method.

- **Expiry Date**: a read-only display of the saved expiry date for existing methods when supported by the gateway.

ACH Payment Method Details

When the selected payment type is **ACH**, the screen shows bank-account-specific fields instead of credit-card fields.

Common ACH details include:

- **First Name** and **Last Name**: the account holder name.
- **Routing Number**: the bank routing number.
- **Account Number**: the bank account number.

Billing Address Details

When a payment method requires billing-address details, the form can display address fields such as:

- **Country**
- **Address 1**
- **Address 2**
- **City**
- **State**
- **Zip Code**

Address behavior can vary by country. Depending on the selected country and address format, some address fields may be shown, hidden, optional, or required.

Secure Hosted Payment Fields

For supported gateway configurations, sensitive credit-card fields can be collected through secure hosted fields instead of standard text inputs. This is expected behavior and helps keep sensitive payment details within the gateway-supported secure entry process.

Guides

Adding A Credit Card Payment Method

1. In the Payment Methods Panel, click **Add**.
2. Enter a **Name** for the payment method.
3. If the payment method should be available immediately, enable **Active**.
4. If the payment method should be used for automatic payment collection, enable **Auto Pay**.
5. Select the appropriate **Gateway** if it is not already defaulted.
6. Select **Credit Card** as the **Payment Type**.
7. Complete the cardholder, credit-card, expiry, and billing-address details that appear.
8. If the gateway requires a **Merchant Account** or **Payment Method Token**, provide those values as needed.
9. Save the payment method.

Adding An ACH Payment Method

1. In the Payment Methods Panel, click **Add**.
2. Enter a **Name** for the payment method.
3. If the payment method should be available immediately, enable **Active**.
4. If the payment method should be used for automatic payment collection, enable **Auto Pay**.
5. Select the appropriate **Gateway** if it is not already defaulted.
6. Select **ACH** as the **Payment Type**.
7. Enter the account-holder and bank-account details that appear.
8. Save the payment method.

Deactivating A Payment Method

Use deactivation when a payment method should no longer be used, but should still remain on the account for historical reference.

1. Select the payment method in the Payment Methods Panel.
2. Clear **Active**.

3. If the screen requires it, select a **Deactivation Reason**.
4. Save the change.

Deleting A Payment Method

Payment methods cannot be deleted if they have been used to process a payment. These used payment methods can be switched to inactivate if you require them to be disabled.

1. Select the payment method in the Payment Methods Panel.
2. Click **Delete**.
3. Confirm the deletion.