


Saved Payment Information

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Add/Save a Patient Credit Card

With cardholder consent, payment (Credit Card) information can be saved for future payments.

1. Select Patient > **Patient**.
2. Use the **Search** field to search through your patients.

 Place a check in the “**Include inactive patients**” box to include inactive patients in your search results.

3. Select the **Patient**.
4. Click the **Billing Info** tab.
5. Navigate to the **Saved Payment Information** section.
6. Click **Add New Card**.
7. Select the Merchant Account (if multiple are available) and click **Continue**.
8. follow the directions on the EMV device or enter the card information within the **Enter Payment Details** window.
 1. **Card Number:** Place your cursor in the Card Number field. Swipe the patient’s credit card using your card reader, or manually enter the card number.
 2. **Expiration Date:** Use the drop-down menus to select the card’s expiration date.
 3. **CVV2/CID:** Locate the CVV2 or CID number on the card and enter it into the field.
 4. **Cardholder Name:** Enter the name on the credit card
 5. **Billing Address/City/State/Zip Code:** Enter all the billing address info for the credit card.
9. Click **Save**.

 You can save multiple cards for a patient under the saved payment information. Want to save a credit card while collecting a payment? Visit our [Save Credit Card While Collecting a Payment Help Article](#) to learn how to save payment information while taking a patient payment.

Edit or Remove a Saved Credit Card

Follow the steps below to edit or remove a saved credit card for this patient.

1. Select **Patient** > **Patient**.
2. Use the **Search** field to search through your patients.

Tip: Check the “*Include inactive patients*” box to include inactive patients in your search results.

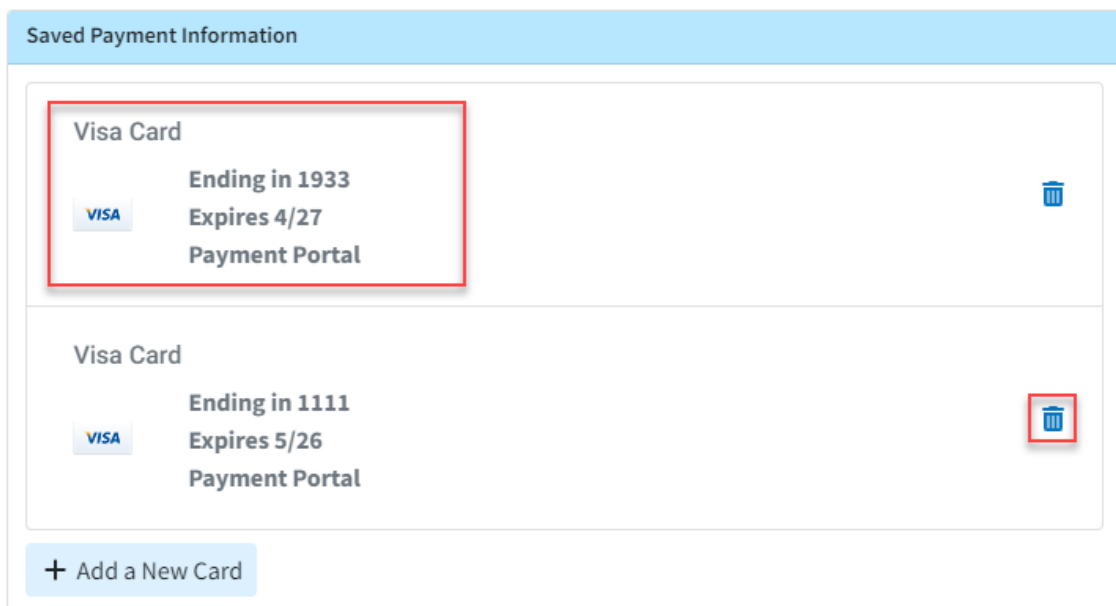
3. Select the **Patient**.
4. Click the **Billing Info** tab.
5. Navigate to the **Saved Payment Information** section.

6. To Edit a Credit Card:

1. Select the credit card from the options.
2. Update the desired information.

7. To Remove a Saved Credit Card:

1. Click the **Delete icon** (Trash Can).



8. Click **Save**.

