

Add/Save a Patient Credit Card

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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.