

Creating Payment Accounts

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Payment Gateways

Before creating a payment account, you may wish to configure one or more payment gateways. See the section on [Gateways](#) to learn more.

About Payment Accounts

Payment accounts are used to store payment information, either encrypted within Blesta, or through the use of a token with the gateway. Payment accounts can be of two different types: Credit Card and ACH (Bank Transfer). Payment accounts can be used to process recurring payments.

To set a payment account for use for recurring payments, select the payment account that should be used on the left, and click the "Use for Auto Debit" button. This option and display are only available if one or more payment accounts already exist for the client.

Payment Accounts

Add ACH Account

Add CC Account

<input type="radio"/>	Name	Type	Last 4	Options
<input checked="" type="radio"/>	First Test	Credit Card - Master Card, expires January 2021	5454	Edit , Delete
<input type="radio"/>	Paul Phillips	Automated Clearing House - Checking	3123	Edit , Delete

Use for Auto Debit

Creating a Payment Account

To create a Payment Account, visit the clients profile page and click "Payment Accounts" under the Actions box, then click the "Add ACH Account" or "Add CC Account" button. The following form is shown:

Add Credit Card Account

Contact Information

Copy Contact Information From

None

First Name

Last Name

Address 1

Address 2

City

Country

United States

State

Alabama

Zip/Postal Code

Credit Card Information

Number

Security Code

Expiration Date

January

2019

Create Account

In both the case of Credit Card and ACH, two sections are displayed.

Contact Information

This section requires basic billing contact details for this payment account. The first option, "Copy Contact Information From" allows the contact information from another contact to be quickly imported into this form. This saves time in cases where a new credit card or ACH account is being added for a contact that already exists.

Credit Card Information / Bank Account Information

This section requires details about the form of payment. In the case of a credit card, the credit card number, security or CVV code, and the expiration date. In the case of ACH, the account type (checking or savings), the account number, and the routing number.

Once all the details are entered, click "Create Account" to create the Payment Account.