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# **Stored Payment Methods: ACH/E-Check & Credit Card**

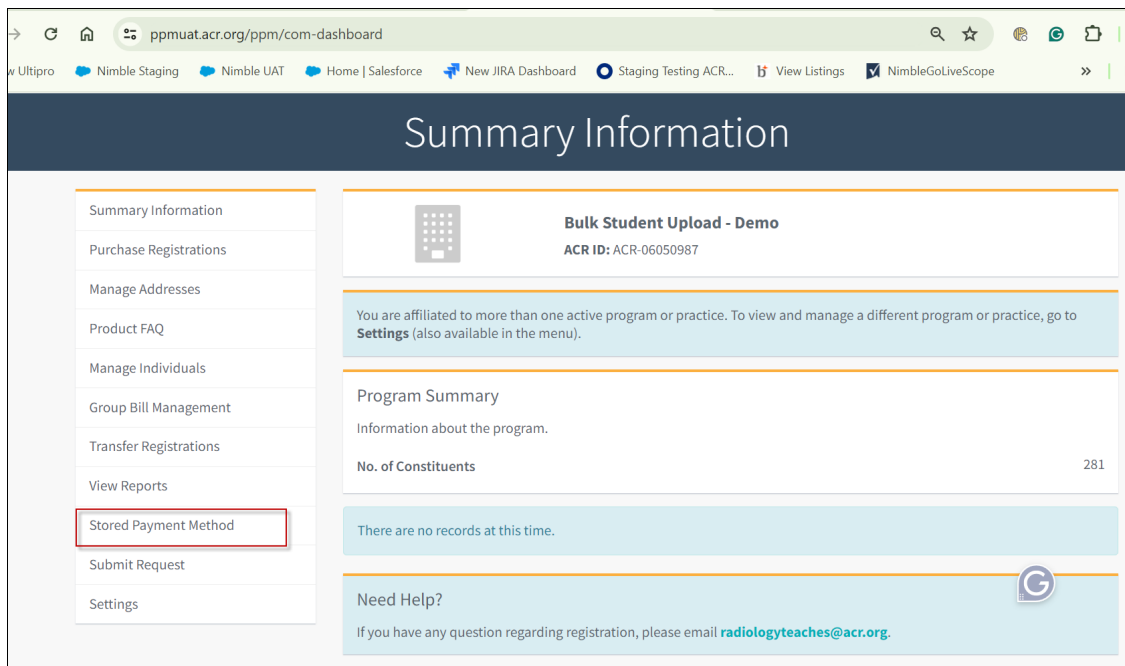
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## Part 1: Setup an ACH/E-Check and Credit Card from the customer (CH) view:

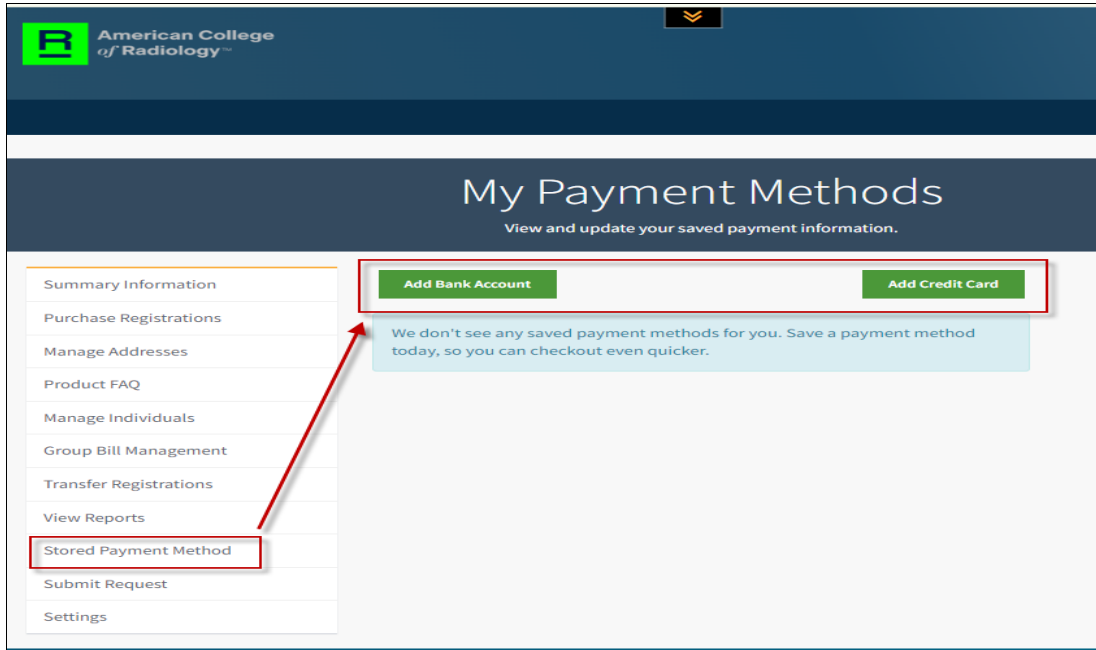
**Important:** In this section, ACR® staff users will understand the basics of storing the ACH/E-Check and credit card payment methods in the ACR customer's account/profile.

### Step-By-Step Approach

1. Login to the **PPM** system.
2. Click on the **Stored Payment Method** option from the left menu.



3. The system will display two options: **Add Bank Account** and **Add Credit Card**.



4. Click the **Add Bank Account** button to store the ACH/E-Check information.
5. For the **ACH/E-Check** testing, use the following details.

Account Number	Routing Number	Postal Code	Billing Address
0000000000	000000000	Any five digits	Any

6. The system allows the users to store more than one form of **ACH/E-Check** information.

My Payment Methods  
View and update your saved payment information.

Summary Information  
Purchase Registrations  
Manage Addresses  
Product FAQ  
Manage Individuals  
Group Bill Management  
Transfer Registrations  
View Reports  
Stored Payment Method

Add Bank Account Add Credit Card

**Saved Payments**

Bank Account ending in xxxx
Expiration Month
Expiration Year
Default <input type="checkbox"/>

Edit

7. The system provides the following options to the users for **each stored payment**.
  - a. **Set as Default** – By selecting this option, the system will use the marked payment method as default.
  - b. **Edit** – By selecting this option, the system will allow the user to update the added payment method.
  - c. **Remove** – By selecting this option, the system will allow the user to remove the chosen payment method.

The screenshot shows the 'My Payment Methods' interface. At the top, there are two buttons: 'Add Bank Account' and 'Add Credit Card'. Below these is a 'Saved Payments' section containing two entries. Each entry displays 'Bank Account ending in XXXX', 'Expiration Month', 'Expiration Year', and 'Default'. A red box highlights the 'Remove' button on the first entry, and a context menu is shown with options: 'Set As Default', 'Edit', and 'Remove'. A red arrow points from the 'Remove' button to the context menu.

8. Click the **Add Credit Card** button to store the credit card information.

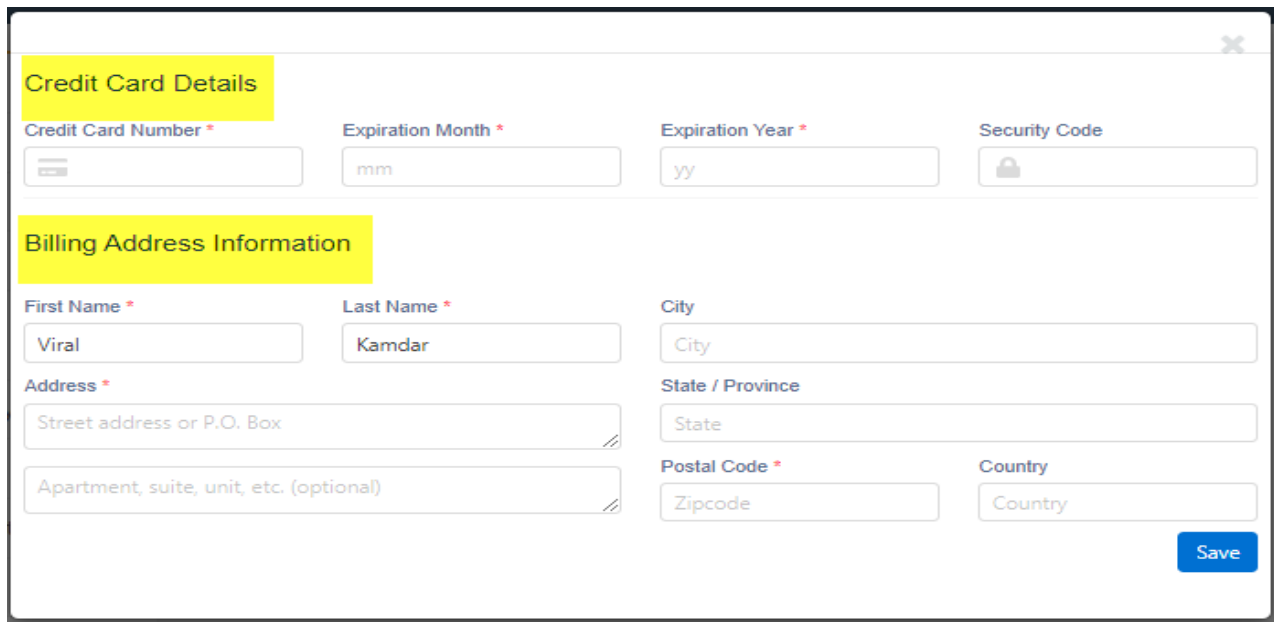
The screenshot shows the 'My Payment Methods' interface with a navigation menu on the left. The menu items are: Summary Information, Purchase Registrations, Manage Addresses, Product FAQ, Manage Individuals, Group Bill Management, Transfer Registrations, View Reports, Stored Payment Method, Submit Request, and Settings. The 'Stored Payment Method' item is highlighted with a red box. A red arrow points from this box to the 'Add Credit Card' button in the top right corner. The main content area shows the 'Add Bank Account' and 'Add Credit Card' buttons, and a 'Saved Payments' section with one entry: 'Bank Account ending in XXXX', 'Expiration Month', 'Expiration Year', 'Default', and a 'Remove' button.

9. For the **Credit Card** testing, use the following details.

a. **Please note** the test credit card will only work if the last digit of the total is an odd number and the entire total is less than \$1000.

b. **For example**, the total should be \$201, \$823, etc.

CCType	Credit Card Number	Expiration Year	Security Code	Postal Code	Billing Address
Master Card	xxxxxxxxxxxxxxxxxx	Any future year	Any three digits	Any five digits	Any
Visa	xxxxxxxxxxxxxxxxxx	Any future year	Any three digits	Any five digits	Any
Visa	xxxxxxxxxxxxxxxxxx	Any future year	Any three digits	Any five digits	Any



The screenshot shows a web form with two main sections: "Credit Card Details" and "Billing Address Information".

**Credit Card Details:**

- Credit Card Number \* (input field)
- Expiration Month \* (input field with "mm" placeholder)
- Expiration Year \* (input field with "yy" placeholder)
- Security Code (input field with a lock icon)

**Billing Address Information:**

- First Name \* (input field with "Viral" text)
- Last Name \* (input field with "Kamdar" text)
- City (input field with "City" placeholder)
- Address \* (input field with "Street address or P.O. Box" placeholder)
- State / Province (input field with "State" placeholder)
- Postal Code \* (input field with "Zipcode" placeholder)
- Country (input field with "Country" placeholder)

A blue "Save" button is located at the bottom right of the form.

## Part 2: Purchase ACR products using the saved ACH/E-Check and Credit Card Payment Method:

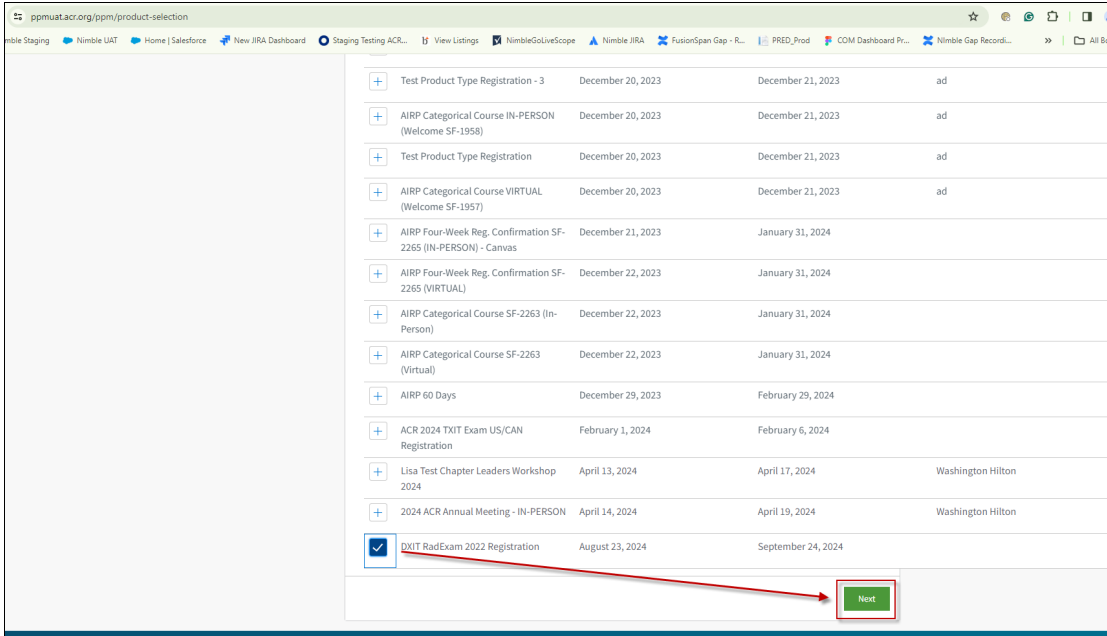
### Step-By-Step Approach

1. Continue from step no. 12 (Part 1).
2. Click on the **Purchase Registrations** tab from the left side menu.

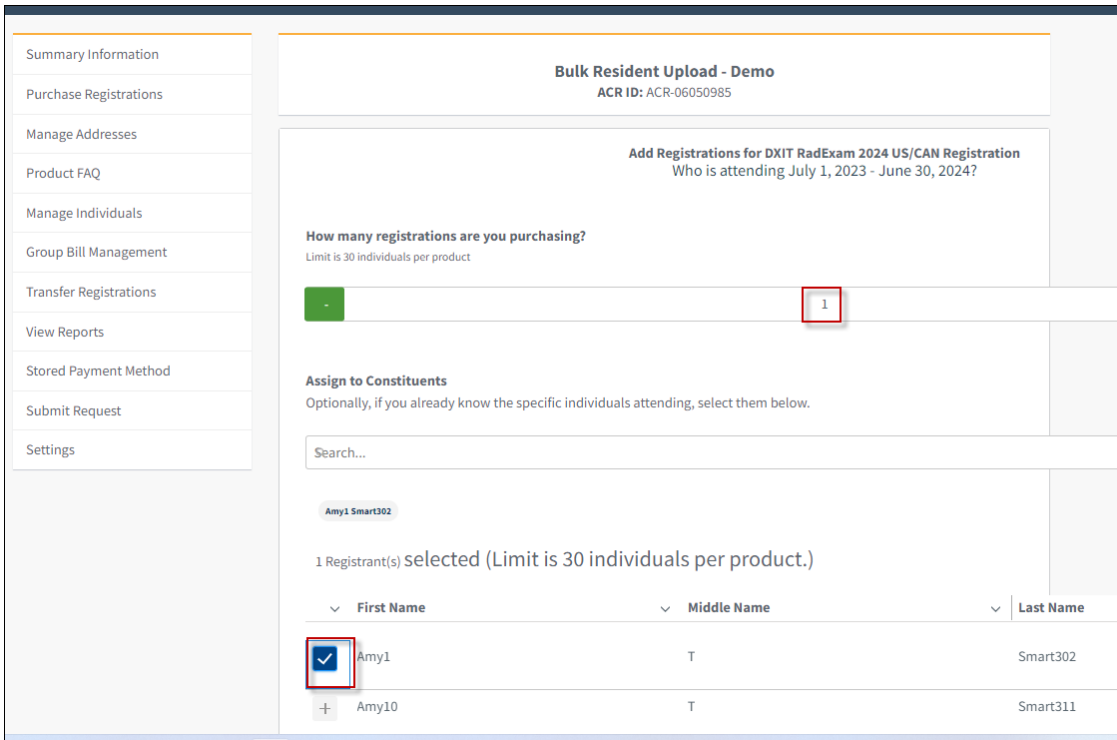
The screenshot shows a web browser at the URL `ppmuat.acr.org/ppm/com-dashboard`. The browser's address bar and tabs are visible at the top. The main content area is titled "Summary Information" in a dark blue header. On the left, a vertical menu lists various options: "Summary Information", "Purchase Registrations" (highlighted with a red box), "Manage Addresses", "Product FAQ", "Manage Individuals", "Group Bill Management", "Transfer Registrations", "View Reports", "Stored Payment Method", "Submit Request", and "Settings". The main content area is divided into several sections. The top section is titled "Bulk Resident Upload - Demo" with an ACR ID of "ACR-06050985" and a calendar icon. Below this is a "View Another Time Period" section with instructions to refresh the dashboard and a dropdown menu for "Time Period" currently set to "Current Year", with a green "Finish" button. A light blue banner below that states: "You are affiliated to more than one active program or practice. To view and manage a different program or practice, go to **Settings** (also available in the menu)." The bottom section is titled "Order Summary - All Time" and includes the text "Information about all orders, regardless of the selected Time Period." and "Account Balance" with a value of "\$0.00".

3. Select any available **Product** and click on the **Next** button.





4. Select how many registrations you are purchasing and select the constituent's name.



5. Once the is product **added**, click on the **Next** button to proceed an order.

Purchase Registrations  
Purchase registrations for your constituents

**Bulk Resident Upload - Demo**  
ACR ID: ACR-06050985

**Review Registrations**  
Review your selections, then click **Next** button to proceed an Order

Product	Registrant	Quantity
DXIT RadExam 2022 Registration	Amy1 Smart302	1

**Subtotal:** \$ 325

**Next**

If you need to start over, click [Purchase Registrations](#) in the menu.

6. Once the unpaid order is created, click on the **Checkout** button.

Purchase Registrations  
Purchase registrations for your constituents

**Bulk Resident Upload - Demo**  
ACR ID: ACR-06050985

Your order was created. Select **Checkout** to pay now by credit card.


To view and print your invoice in order to submit payment at a later date, please click [HERE](#) or from the main page, select Summary followed by View Orders.

**Checkout**

7. Select **payment methods** (ACH/Credit Card) already saved and click the **Submit** button.

## Checkout

Review Your Selection and Pay.

Merchandise Products		
Product	Quantity	Total Price
 CPI Nuclear Radiology Module 2019 (ONLINE)	<input type="text" value="1"/>	\$105.00

Coupon Code

Limit one per order.

Code

My Payment Methods

You have selected the Saved Payment option. [Add, edit, or remove your saved payments](#) if you would like to update your payment information.

Bank Account ending in XXXX

Bank Account ending in XXXX

VISA ending in XXXX  
Expires 11/2024

Payment Type

Pay Now - Saved Payment

Pay Now - New Credit Card

Billing Address

Country

Street

City

State/Province

Zip/Postal Code

eCheck Payment Authorization

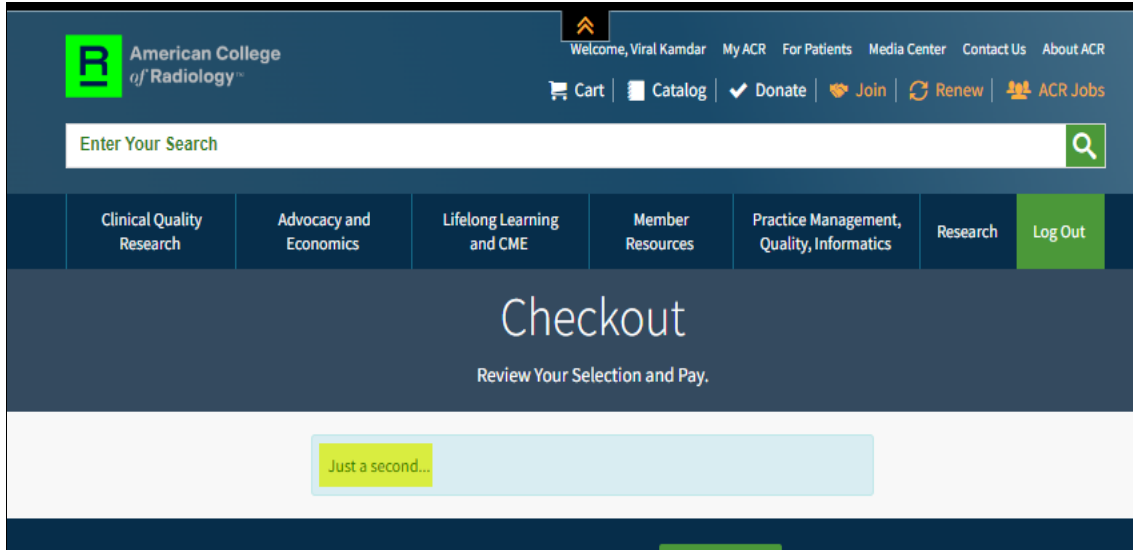
Bank Account Type: Checking  
Bank Account Number: 7890

By clicking the Submit button below, I authorize ACR to charge my Checking account ending in 7890 on September 13, 2023 for the amount of \$105.00 for the above listed products.

Total Details

Grand Total	\$105.00
Balance	\$105.00

8. The system will display the following screen.



9. Once the payment is processed, the system will create an **Order Summary**.

