Account Payment for Customers - Classic sites

Overview

Customer Self Service features a **'Pay Your Account'** functionality which allows customers to pay outstanding invoices by credit card.

Customers can select from pre-defined time periods, part-pay invoices, and request invoice reprints via the Account Payment page.

You can Pay Your Account using this form.

Select the invoices you wish to pay by clicking the "Pay" Checkbox.
Select the [Continue Payment] button to process the payment through the Secure Internet Payment Service.

You can chose from the day based periods below, to auto-select the invoices for those time spans

	Current $3,329.37	☑ 30 $9,167.95	☐ 60 $0.00	☐ 90 $0.00

Click on an Invoice # to request copy

Date	Invoice #	Due	Invoice Amt	Owing	Discount	Pay ? all	Payment Amount
06-May-2014	339334	30-Jun-2014	$1,059.96	$1,059.96		☑	1,059.96
09-May-2014	339958	30-Jun-2014	$1,270.50	$1,270.50		☑	1,270.50
30-May-2014	339958A	30-Jun-2014	$114.18	$114.18		☑	114.18
06-May-2014	340693	30-Jun-2014	$1,467.18	$1,467.18		☑	1,467.18
08-May-2014	341087	30-Jun-2014	$821.56	$821.56		☑	821.56
09-May-2014	341351	30-Jun-2014	$1,996.50	$1,996.50		☑	1,996.50
14-May-2014	341898	30-Jun-2014	$389.81	$389.81		☑	389.81
14-May-2014	342246	30-Jun-2014	$1,359.88	$1,359.88		☑	1,359.88
04-Jun-2014	342581	31-Jul-2014	$1,304.82	$1,304.82		☐	
30-May-2014	342581A	30-Jun-2014	$571.56	$571.56		☑	571.56
19-May-2014	342584	30-Jun-2014	$116.82	$116.82		☑	116.82
02-Jun-2014	344885	31-Jul-2014	$915.75	$915.75		☐	
03-Jun-2014	345006	31-Jul-2014	$1,108.80	$1,108.80		☐	

Total Payment Amount : $9,167.95

[Calc]

[Continue Payment]

> ⓘ See below for prerequisites!

Step-by-step guide

Account Payment is enabled at the Role level, by adding the relevant page to the role's menu structure.

To Enable Account Payment:

1. Login as an Administrator.
2. Navigate to **'Accounts'** --> **'Role Management'** (/zRoles.aspx).
3. Select the required Role via radio button. The Role Details page will load.
4. Note the **'Menu Code'** assigned to the role.
5. Navigate to **'Content'** --> **'Menu Editor'** (/zMenus.aspx).
6. Select the required **'Menu Code'** via radio button.
7. Click **'Parent Items'**.
8. Identify the Parent menu item to which the Account Payment page will be added.
9. Select the record via radio button.
10. Click **'Menu Items'**.
11. Click **'New'**.
12. Create a new item - Page Name = **'AccountPayment.aspx'**. See *Adding a new menu item* for further detail.
13. Repeat Steps 2-12 for other roles as required.

Modify : New : Delete : SubMenu Items : Cancel : OK

6 records. (1 page)   1

Menu Code :	B2B Full Access
Menu Item Code :	ACCTPAY
Parent Item :	MyAccount - My Account
Label for Navigation Pane :	Pay Your Account
Description :	Pay Your Account
Page Name :	AccountPayment.aspx
Custom Page Code :	Please Select ..
Sequence :	59
Menu Item Image Name :	
Custom Class for Menu Item :	
Requires Authentication :	☑
Hidden :	☐
Staging Only Item :	☐
Show Navigation Order Summary :	☐
Width :	
Separator :	☐
Parameter :	
Help Page :	

There are further flags available at the Role and System levels, which can be customised, or left at their default values. A summary of these is provided below.

Optional Role flags:

- **'Disallow Account Payment Adjustments'** - when ticked, locks the 'Total Payment Amount' from editing. Users can edit payment amounts against individual invoices only.
- **'Show Transact Details Column in Account Pay Page'** - when ticked, adds a new column to display Transaction Details from the 'CustomerTrans' database table.
- **'Display Branch Account Invoices in Account Payment'** - when ticked, will include invoices for Bill-To accounts on the Account Payment page.

ⓘ NOTE:

Optional System Settings:

- **'Account Payment Current Display Option'**:
    - **Default** - The amount shown for the 'Current' period will include just this month's transactions.

- - **Current Includes Last Month** - The amount shown for the 'Current' period will include last month's transactions as well as this month's.
  - **'Enable User & Non-Web Order Filters in AccountPay'** - when ticked, enables filters on the Account Payment page which allow the user to 'Show Web Orders Only' and/or 'Show My Orders Only'.

Related articles

- [Braintree Payments - Credit Card Data Flow](#)
- [Release Payments](#)
- [Cost Centres](#)
- [Force User to Select Customer Upon Login](#)
- [Assign Multiple Customer Accounts to a User](#)

Additional Information

The 'Disallow Account Payment Adjustments' flag can be set at both the Role <u>and</u> Customer levels.

Minimum Version Requirements	**.**.**
Prerequisites	Prior to enabling Account Payment functionality, the site must have an online payment facility in place with either DPS, eWay, or TNS (formerly Dialect).
Self Configurable	No
Business Function	Payment Types
BPD Only?	NO
B2B/B2C/Both	B2C
Ballpark Hours From CV (if opting for CV to complete self config component)	Contact CV Support
Ballpark Hours From CV (in addition to any self config required)	1
Third Party Costs	Fees Apply
CMS Category	N/A (Classic sites don't utilise Commerce Vision CMS)