

amilia

Westfield & Amilia

July 24, 2024



The User Wallet

What are considered as “Wallet Items”

- Credit Cards
- Bank account details
- Gift card balances
- Upcoming payments

Conditions

- The account must be **activated/confirmed** by the account owner to be able to complete the following operations:
 - Add/Replace/Confirm/delete or update authorizations on Credit cards & Bank accounts
 - Edit a payment method on an upcoming payment (ongoing membership or installment payments).
 - Redeeming a gift card balance



How do Clients save payment methods to their wallet?

- Clients can save up to **10 credit cards** and **10 bank accounts** to choose from (when paying at checkout)
- Clients **must authorize** your organization to give permission to use a payment method in your store when acting on behalf of a user.
 - To authorize, this client must exist as a client in the Clients listing of your organization.
- Clients can **save a payment method without providing authorization**, meaning they can use it at checkout, but you as the organization cannot use this method and must manually key in the information
- When a payment is saved and authorized for use, these will appear in the client list with the following icon in **the Accounts and/or People** tabs:

The screenshot shows the 'Clients' interface with the 'Accounts' tab selected. A search bar and filter options are visible. Below, a table lists clients with columns for Account owner, Account created, Income, Last transaction, Saved payment methods, Email Status, Balance, and Expected balance. Two clients are listed: Scandar, Tristan and Smith, Sally. The 'Saved payment methods' column shows icons for credit cards and eChecks. A green box highlights the 'Add filter' button and the 'Saved payment methods' column header.

Account owner	Account created	Income	Last transaction	Saved payment methods	Email Status	Balance	Expected balance
Scandar, Tristan	2021-10-20	\$500.00	2022-10-27			\$0.00	\$0.00
Smith, Sally	2021-06-10	\$20597.98	2023-01-31	 		\$874.18	\$874.18

- The wallet is managed by the Account owner, meaning if a payment method is authorized for use in their wallet, **this will apply to all the members in their account that exist in your store** also.



How do Clients manage their upcoming payments?

Pop Quiz! Clients have the ability to update the following in their upcoming payments?

- a) The payment method
- b) The date of the payment
- c) The amount of the payment
- d) All of the above

Clients can only update the payment method on an upcoming payment. Other actions can only be completed by Administrators (with the correct permissions)

Resources

Articles for Clients

- [How members manage their wallet](#)
- [How members can save payment methods for future use](#)