Overview

Payment Profiles provides customers the ability to securely save multiple credit cards and ACH payment methods in their accounts. Customers can choose from their saved payment profiles when placing orders, giving them greater flexibility to organize their payments.

Key Benefits

Customers:

1. Allows customers to select from multiple payment options for their orders.

2. Allows customers to assign a nickname to quickly identify the desired payment method.

3. Allows customers to add, edit, or remove payment methods.

4. Allows customers to change the payment method up to the time of order completion.

5. Allows customer to see a summary of estimated fees during checkout.

Partners:

1. Ability to select the customer's payment choice while placing orders on their behalf.

2. Ability to change the payment option for any open orders.

3. View a history of each payment method used for each order, providing transparency and an audit trail.

How to Add a Payment Method

Click on "My Profile", then click on "Payment Information". In the **Payment Methods** section click on "Add Payment Method", then select **Credit Card** or **ACH.** Complete the required fields and click on **SAVE**.

How to Set a Default Payment Method When Adding a New Credit Card:

Click on "My Profile" then click on "Payment Information". In the **Payment Methods** section click on "Add Payment Method". Select **Credit Card** or **ACH** and complete the required fields. Select the "Set as default" checkbox and click on SAVE.

What happens if a client's credit card is declined?

If a **preferred payment method** fails or is declined during processing, the account's **default payment method** will automatically be charged.

How to edit the Nickname for a Payment Method

In the **Payment Method** section, click on the three dots for the payment method you would like to edit. Click on **Edit** and enter the new name, then click on **SAVE**.

How to Delete a Payment Method

*In the **Payment Method** section, click on the three dots for the payment method you would like to delete. Click on **DELETE**. Read the confirmation dialog box, then click on OK.

*Note: If you wish to delete the existing default payment method you must **first assign a different payment method as the default**. After the different payment method has been assigned, you may return to the original payment method and use the "delete" option.

Frequently Asked Questions

When will Multiple Payment Methods go live?
   a.   Multiple Payment Methods will go live on December 15, 2023.

What types of payment methods are accepted?
   a.   Customers may save multiple credit cards (Visa, Mastercard, American Express, Discover) and ACH accounts (Business and Personal Checking) to their LegalConnect account.
   b.   *Note: Debit cards are not accepted and at least one payment method is required per account.*

What information do Customers need for a payment method to add an account?
   a.   Credit Cards: cardholder name, card number, expiration, security code and billing address.
   b.   ACH Accounts: account type, account holder name, routing number, account number and billing address.

What is the Nickname for?
   a.   Customers may enter a friendly name for each payment method to help differentiate each account. Examples:

   - Corporate Visa
   - Backup Visa
   - Ford Corporation's Mastercard
   - Wells Fargo Business Checking

How do Customers change their default payment method?
    a.   If Customers have multiple payment methods on their account, <u>they must designate one to set as a default</u>.
    b.   Customers may change the default on these pages:

- Click on My Profile > Payment Information (*available to Admins only*).
- On the Order Details tab when placing an order.

    c.   Click on the three-dot menu beside the payment account you'd like to use, then click on "Set as default."

    d.   Orders placed after making this change will use the new default account. Previous orders will use the payment method used at submission.

Can Customers manage their payment methods?

    a.   Yes. Customers may manage their payments methods on the Order Details tab when placing an order, and in the My Profile section of the LegalConnect portal. They may add, edit or delete a payment method for their account.

Fee Waiver:

What Payment Method should users choose if they have a Fee Waiver?
    a.   If a court eFiling order qualifies for a Fee Waiver, a "Fee Waiver" shall be selected by default.

Open Credit Options:

Does an account still need a credit card or ACH payment guarantee if they request Open Credit?
    a.   Yes.

Can a Service Provider create an Open Credit account in the Ops Portal without a payment guarantee?
    a.   Yes.

Can a Customer delete their default payment method?
    a.   Yes, however, they must select a new default payment method before deleting the previous one.

Service Providers:

Can a Service Provider manage a customer's payment method on their behalf?
    a.   No. Per PCI regulations only cardholders may add, edit or delete a payment method. Service Providers can only view a summary of information including nickname, last 4 digits, expiration.

Can a Service Provider change the payment method for an order after it is placed?
    a.   Yes. Service Providers may change the payment method for any invoices that have not been paid.
    b.   A status update will automatically be added to the order if the payment method is changed.

Can a Service Provider select which payment method to use when placing an order on behalf of customer?
    a.   Yes. Service Providers may select from available payment methods on the customer's account.

What happens to an order if the payment is declined?
    a.   If the Payment Method is declined, the invoice/order will be placed in Payment Errors to be reprocessed.

Can an Operations user delete a Payment Method for pending orders?
    a.   No.

What does a customer do if a payment is declined?
An update to the payment for the order may be made by the user and/or Service Provider up until the moment the Service Provider receives a payment confirmation ID.