

Create A Default Customer Payment Method

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Go to **Customers** and select the customer to manage.

The default payment method can either be a credit card or ACH and is used for subscription payments. If you only have one payment method on file for a customer, it will be marked as the default automatically. If there is more than one payment method on file for a customer, you can select which payment method to set as the default.

To create a credit card default for subscription payments:

1. View the **Payment Methods** section of the customer record.
2. Click ***New Payment Method***.
3. Enter the required fields of *Card Number*, *Card Expiry Date*, *Postal Code*, and *Country*. Optionally you can add *CVV2*, *Business Name*, *Street Address*, *Apt or Suite*, *City*, *State*, or *+4 of the postal code*. The [Default Card Billing Information Table](#) identifies all the fields with a description.
4. Click ***Add***.

To create an ACH account default for subscription payments:

1. View the **Payment Methods** section of the customer record.
2. Click ***New Payment Method***.
3. Select ***ACH***.
4. Select the type of ACH account from the drop-down menu. Options are: *Personal Checking*, *Personal Savings*, *Business Checking*, or *Business Savings*.
5. Enter the required fields of *Bank Routing Number*, *Account Number*, *Postal Code*, and *Country*. Optionally you can add *Business Name*, *Street Address*, *Apt or Suite*, *City*, *State*, or *+4 of the postal code*. The [Default ACH Billing Information Table](#) identifies all the fields with a description.
6. Click ***Add***.

To change the default payment method:

1. View the **Payment Methods** section.
2. Click on the radio button next to the payment method that you want to select as the default.

Default Card Billing Information Table

Field	Syntax	Required/Optional
Account Number	12-19 Numeric	Required
Card Expiry Date	2 digit month and 2 digit year (MMYY format)	Required
CVV2	4-6 Numeric	Optional
Verify on Update	Toggle	Optional and recommended
First Name	32 AlphaNumeric	Optional
Last Name	32 AlphaNumeric	Optional
Business Name	64 AlphaNumeric	Optional
Street Address	32 AlphaNumeric	Optional
Apt or Suite	32 AlphaNumeric	Optional
City	32 AlphaNumeric	Optional
State	32 AlphaNumeric	Optional
Postal Code	16 AlphaNumeric	Required
+4	4 AlphaNumeric	Optional
Country	Select from drop-down menu	Required

Default ACH Billing Information Table

Field	Syntax	Required/Optional
Account Type	Select from drop-down menu between personal and business accounts as well as savings versus checking account.	Required
Bank Routing Number	9 Numeric	Required

Field	Syntax	Required/Optional
Account Number	17 Numeric	Required
First Name	32 AlphaNumeric	Optional
Last Name	32 AlphaNumeric	Optional
Business Name	64 AlphaNumeric	Optional
Street Address	32 AlphaNumeric	Optional
Apt or Suite	32 AlphaNumeric	Optional
City	32 AlphaNumeric	Optional
State	32 AlphaNumeric	Optional
Postal Code	16 AlphaNumeric	Required
+4	4 AlphaNumeric	Optional
Country	Select from drop-down menu	Required