Payment Management (Subscriptions)

Subscriptions are used to allow you to tag a default method of payment for any permits that you roll over from month to month. You can use payroll deductions, EFT, or credit cards as payment methods for subscriptions. Subscriptions only affect permits that are being rolled over from a previous allocation period. Users can manage multiple payment methods on their account through the user portal but only one method may be set as primary. Admins can also add payment method details to a user profile.

In order for subscriptions to function, the user must provide information pertaining to the payment method they wish to use for their subscription service.

There are three main payment types that are used for subscription services:

- Electronic Funds Transfer (Must be entered in the system by an Administrator)
- Credit Card (Can be entered both by the client through their online profile as well as by an Administrator)
- Payroll Deduction (Handled by the Administrator through the OPS-COM System)

Quick Steps:

1. Search and select the **User Profile**.
2. Using the **Profile** dropdown, click **Manage Payment Methods**.
3. To add a payment method click **Add New Payment Method** under **Payment Subscription Options.**
4. To use a payment type for recurring payments or to be auto-charged for Permit Rollovers, click the drop down and chose the payment type from the dropdown under **Permit Rollover Subscription** and then click **Save.**
5. You will see a popup indicating that your permit rollover subscription has been updated.

Step by Step Instructions:

1. **Search for the User**:
   - Use the **Quick Search** or **User Search** functions to locate the user whose credit card you want to manage.
   - Select the **User** to access their **Profile**.

2. **Access Manage Payment Methods**:
   - Use the **Profile** menu dropdown to choose **Manage Payment Methods**.
3. **Add a Payment Method**:
   - Under **Payment Subscription Method** on the right side of the screen, click **Add New Payment Method**.
   - When you have added your credit card information, click **Add Payment Method** button to register in the system.
   - If choosing **EFT (Electronic Funds Transfer)** as your new payment method, you will need to also fill out a Label (typically the bank name and type of account ie: Savings) and the user's banking information before clicking **Add Bank Information** button to register in the system.

> Note: EFT can only be used for subscriptions and cannot be used to pay for any other items.

1. **Add Permit Rollover Subscription**:
   - Choose the **Payment Method** from the dropdown list under **Permit Rollover Subscription** on left side of screen.
   - Click **Save**.
   - You will see a popup indicating that the subscription payment method has been saved/updated.

> To do this, Admins must have the **Allow Credit Card Processing** setting turned on in **System Settings>Permits.**

> To use this card to pay for recurring permits, the user must have purchased his previous permit through the same payment type so that the system would have a record of the payment type used.