

Managing Payment Types

Managing Payment Types allows administrators to control which payment methods are available throughout the system. This comprehensive control enables you to define new payment options, assign them to specific user types (e.g., Staff, Students, Public), and configure their usage for subscriptions or guest payments, thereby streamlining transactions and ensuring alignment with your organization's financial policies.

Using this Feature

The **Payment Types** screen gives you a comprehensive interface to create, edit, and view details about different payment methods available in OPS-COM.

1. Hover over **System Configuration**, then **Payments**, and click **\$ Setup Payment Types**.

Adding Payment Types

Use Case - For this example, we will setup a Payment type that will use the provider Always Successful. This will allow payments to immediately be flagged as fully processed with no intervention of any admin. This is often used for things like Payroll deduction. For example, you want your users to be able to purchase a permit through Payroll deduction that will immediately be valid upon checkout. The actual payments will take place through payroll and have nothing to do with OPS-COM.

1. Click the **Add Type** button.
2. The list of **Providers** is hard coded and controlled by Tomahawk. You will not be able to change this picklist. The tooltip below the provider will tell you what each provider means.
3. Pick **Always Successful** for this example.
4. Click **Next Step**.
5. Provide a **Type Name**.
6. Choose the **User Types** this will be available to.
7. On the **Settings** tab, Enable the checkboxes as you required.
8. In the section **Allowed Payment Types**, you will see any payment types that are currently active first, then a list of inactive payment types after.
9. Click **Update Payment Type**.

Extended Payment Information

For each payment type, you can view extended information on the Payment Types screen.

- A **general description** of the payment type.
- An **indication of what the user will be prompted for** when selecting that payment type. For example, in a hosted payment scenario like EdgeExpress, the user might be prompted to enter an email address before being redirected to the payment provider to enter credit card information.
- The number of users associated to this payment type.

There are also three columns on the far right that use an **X** or **checkmark** to indicate specific uses of the payment type:

- **Column 1:** Indicates if this payment type can be used for **guest payments**.
- **Column 2:** Indicates if this payment type can be used for **permit and invoice renewal payments**.
- **Column 3:** Indicates if this payment type can be used for **Text2ParkMe subscriptions**.

Configuring Payment Types for Subscriptions and Guest Payments

You can fine-tune how specific payment types are used for subscriptions and guest payments.

1. Find the payment type you wish to configure and click the **Pencil icon**.
2. Click the **Settings** tab.
3. Select the items you wish to allow the payment type to be used for (e.g., enable **Text2ParkMe, subscriptions to permit renewals**, as well as **guest payments**).
4. Click **Update Payment Type**.

Processing as an Admin

When processing payments as an administrator, the payment types presented will be split into two categories:

- What the user would be allowed to use for their specific User Type.
- What an administrator can choose (which may include additional options not visible to the user).

Best Practices & Considerations

- **Granular Control:** Leverage User Types to restrict payment methods, ensuring users only see relevant options. For example, you might only allow "Payroll Deduction" for Staff users.
- **Clear User Experience:** By limiting available payment types based on context or user, you simplify the checkout process and reduce confusion for users.
- **Refund Alignment:** Ensure that appropriate refund types are linked to their corresponding payment types to facilitate smooth and accurate refund processing.

- **Subscription Compatibility:** When enabling payment types for subscriptions (recurring billing), verify that the chosen payment gateway provider fully supports recurring transactions.
 - **Regular Review:** Periodically review your payment type configurations and their associated settings to ensure they remain aligned with your organization's financial policies and evolving needs.
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