



Steps to Store a Credit Card in E-File

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WARNING: \$0.05 Stored Credit Card Service Fee per use.

Manage Credit Cards

1. Select **Account** menu
2. Select **Manage Credit Cards**
3. Click **Add** button
4. Enter **Credit Card Description** (Nickname)
5. Click **Continue** button

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Account Support

Manage Credit Cards

View Available Credit Cards

Change Payment Method

Manage Card

Set or Revoke Access

Settings

Accounting Tools

Notice

If you choose to store payment account information for your convenience or to share your payment account information with others in your firm, then you should use the tool available on this screen.

This service stores your payment account identifying information (credit card number or bank account information) securely in a 3rd party PCI Certified Data Center which provides E-File with a token used to call your payment information for processing. Please be aware that each time that you use the service, a \$0.05 stored credit card fee will be added to the payment credit card service fee.

+ Add Edit Delete Refresh Set Access

Name Credit Card # Shared With

Add Credit Card

Card Description:

Continue Cancel

6. Enter **Billing Information**
 - Name
 - Email
 - Phone
 - Zip Code
7. Enter **Payment Details**
 - Card Number
 - Expiry (Expiration MM/YY)
 - CVV
8. Click **Continue** button

Set Access

9. Select **Credit Card** from list
10. Select **Set Access** button
11. Click **Add** button
12. Type Staff Member's **User ID** (email address) in User ID field
Example: Sally.Smith@law.com
13. Click **OK** button
14. Click **Close** button

First Name Last Name

Email

Phone

Zip Code

VISA MASTERCARD DISCOVER AMERICAN EXPRESS JCB

Card Number

Expiry CVV

Continue

+ Add Delete Refresh Set Access

Name Credit Card

Set Attorneys

Visa - Visa **0007 XXXX-XXXX

+ Add Edit Delete

Bar ID

Add/Edit Attorney

User ID: Sally.Smith@law.com

OK Cancel

Close