



# Adding or Updating Your Credit Card Information for Invoice Payment



# Invoice Payment by Credit Card

Many SnailWorks clients enjoy the convenience of keeping a credit card on file for invoice payment.

When you enter card information into your account you have the security of knowing no physical record of your credit card is on file – your information is securely held by our credit card processing firm. You also have the flexibility of changing the credit card on file at anytime simply by logging into your account.



# SECURLY PROVIDING A CREDIT CARD FOR PAYMENT OF MONTHLY INVOICES

LOGIN TO  
YOUR  
SNAILWORKS  
ACCOUNT

Your account must be enabled by SnailWorks to allow invoice payment by credit card. Your SnailWorks project manager can assist with this.

NAVIGATE  
TO THE CREDIT  
CARD LINK

This link is located on the master account page in the lower right – you will need to scroll down to locate.

COMPLETE THE  
ONLINE FORM

The credit card link will bring you to an online form for your credit card information.





# NAVIGATING TO YOUR MASTER ACCOUNT PAGE

From the main menu select your master account – it will be at the very top of the accounts listed in the left side of the screen.

Click on the pencil icon located on the right side of the red bar.

The screenshot shows the SNAILWORKS web application interface. The header includes the logo, navigation links (Subscribe to E-newsletter, Contact Us, Sign-Out), and social media icons. A purple navigation bar contains menu items: Mail Tracking, Campaigns, Company, Reports, Admin, Analytics, and Support. On the left, a 'Clients' sidebar lists various accounts, with 'Demonstration Account' highlighted. The main content area displays a 'Mail Tracking Client Summary' table with columns for Account Id, Company Name, Job Cnt, Split Cnt, Total Mailed Qty, and Total Tracked Qty. A red arrow points to a pencil icon in the top right corner of the table header.

Account Id	Company Name	Job Cnt	Split Cnt	Total Mailed Qty	Total Tracked Qty
11200	Demonstration Account	0	0		
16936	February 10, Webinar	0	0		
11204	First Class Delivery Job	0	0		
11205	Standard Rate Account	0	0		
15921	The Catalog Company	0	0		
13810	The Mailing Group	0	0		
18663	UG Meeting 23	3	3	11,523	11,523

# NAVIGATE TO THE CREDIT CARD LINK

**Scroll to the bottom of the screen** - click on the Credit Card Profile link to access the Payment Profile form.

Remember to contact your SnailWorks project manager to ensure your account has been setup for credit card payment.



FA:

Email:

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User-defined Column Labels

UDC	Enabled	Label
1	<input type="checkbox"/>	<input type="text" value="UserDefined1"/>
2	<input type="checkbox"/>	<input type="text" value="UserDefined2"/>
3	<input type="checkbox"/>	<input type="text" value="UserDefined3"/>
4	<input type="checkbox"/>	<input type="text" value="UserDefined4"/>
5	<input type="checkbox"/>	<input type="text" value="UserDefined5"/>

[Client Activity Report](#)  
[Monthly Billing Report](#)

[Unmatched Scans](#)  
[Scan Volume By MID](#)  
[Credit Card Profile](#)  
[Pricing](#)  
[Client Fees](#)

Date Created: 3/2/2015 1:56:31 PM  
Date Modified: 1/27/2021 3:05:05 PM

# COMPLETE THE ONLINE FORM

**Complete all displayed fields and click submit** – by default your company address will populate, you may update these fields as they must match the address your credit card company has on file.

Mail Tracking Campaigns New Campaign Upload Files Reports New Client Admin

Client Billing Setup - SnailWorks

Payment Profile Information

Profile Id:

First Name:

Last Name:

Street:

City:

State:

Zip:

Email:

Payment Card Information

Name on Card:

Credit Card Number:

Expiration:

Card Verify Code:

Active:

Submit





**Each of your SnailWorks invoices will now automatically post each month to your credit card. You may update or change the card on file by following these steps at any time.**



# QUESTIONS?

We love to hear  
from our clients!



**SNAILWORKS**  
*Direct Mail Insights & Solutions*



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