

# How to manage expired credit cards

Approximately 45 days before a card is expired, an internal email notifying staff off the upcoming expiry.

Alternatively you can also get a list of expiring cards, but navigating to the Recurring Payments Tab, then creating or selecting an existing list view filter based on the Card Expiry Date. Also, make sure you enter the details in straight away and staff do not write them down for updating later.

## 1. Contact payee for instructions

You'll need to call the payee or ask them to phone you with the new details. Please ensure they don't email you the Credit Card details.

If their card expiry date is the only option to have been updated, then you can select that option, vs. getting the full card details again.

### 1.1. Navigate to the Recurring Payments tab

The screenshot shows the Payments2us web application interface. The top navigation bar includes the Payments2us logo, a search bar for recurring payments, and various menu items like Home, Merchant Facilities, Payment Forms, About Payments2Us, Recurring Payments (selected), Payment Txn's, Opportunities, and More. The main content area is titled 'Recurring Payments' and shows a list of 2 items. The list is sorted by Recurring Payment Name and filtered by all recurring payments. The table below shows the details of these two items.

	RECURRING ...	RECO...	A...	A...	CONTACT	C...	P...	NEXT ...	E...	R...	R...	E...	PAYMENT F...	FR...
1	<input type="checkbox"/> Bob Barker Donation	Credit Card			Avi Green			7/05/2019	Active	<input type="checkbox"/>			1. Online Payment	Daily
2	<input type="checkbox"/> Loan repayment	Credit Card			Anusree Murali			6/06/2019	Active	<input type="checkbox"/>			1. Online Payment	Monthly

## 1.2. Find the recurring payment name

The screenshot shows the 'Recurring Payments' section of the Payments2Us interface. At the top, there is a search bar and navigation tabs. Below, a table lists recurring payments. The second row, 'Loan repayment', is highlighted with a red box. The table columns include checkboxes, payment names, payment methods, contacts, start dates, statuses, and payment frequencies.

	RECURRING ...	RECO...	A...	A...	CONTACT	C...	P...	NEXT ...	E...	R...	R...	E...	PAYMENT F...	FR...
1	<input type="checkbox"/>	Bob Barker Donation	Credit Card		Avi Green			7/05/2019		Active			1. Online Payment	Daily
2	<input type="checkbox"/>	Loan repayment	Credit Card		Anusree Murali			6/06/2019		Active			1. Online Payment	Monthly

## 2. New Card

### 2.1. Select the Update Card Details button

The screenshot shows the detailed view of a recurring payment named 'Loan repayment'. At the top, there are action buttons: 'Edit', 'Update Card Details' (highlighted with a red box), 'Credit Card Token Payment', 'Update Expiry Date', and 'Change Record Type'. Below this is a summary table with fields like 'Recurring Payment Status', 'Contact', 'Account', 'Amount', 'Frequency', and 'Last Payment Date'. A status bar shows 'Active' as the selected state. On the right, there are several dropdown menus for 'Payment Txn's', 'Recurring Payment Txns', 'Change Schedules', 'Change Schedule Logs', 'Opportunities', and 'Notes & Attachments'. The bottom section is titled 'Details' and includes an 'Information' tab with fields for 'Recurring Payment Name', 'Recurring Payment Status', 'Cancellation Reason', 'Account', 'Contact', and 'Campaign'.

## 2.2. Update details and confirm

The screenshot shows the 'UPDATE REGULAR PAYMENT DETAILS' form for a 'Loan repayment'. The form includes the following fields:

- Credit Card Type:** Radio buttons for Visa and MasterCard.
- Name On Card:** Text input field containing 'Anusree Murali'.
- Credit Card Number:** Text input field.
- Expiration Month:** Dropdown menu set to '--None--' and a year input field set to '2019'.
- CCV:** Text input field.
- Message:** Text area for additional notes.

Buttons for 'Cancel' and 'Confirm' are located at the top right of the form.

## 3. New Expiry Date

### 3.1. Select the Update Expiry Date button

The screenshot shows the 'Recurring Payment Loan repayment' record page. The 'Update Expiry Date' button is highlighted with a red box. The page displays the following information:

- Buttons:** Edit, Update Card Details, Credit Card Token Payment, **Update Expiry Date**, Change Record Type.
- Summary:**
  - Recurring Payment Status: Active
  - Contact: [Anusree Murali](#)
  - Account: [Blank]
  - Amount: AUD 0.00
  - Frequency: Monthly
  - Last Payment Date: 6/05/2019
- Status:** Active (selected), Inactive, Suspended - Max retries ex..., Expired.
- Details:**
  - Information:
    - Recurring Payment Name: Loan repayment
    - Recurring Payment Status: Active
    - Cancellation Reason: [Blank]
    - Account: [Blank]
    - Contact: [Anusree Murali](#)
    - Campaign: [Blank]
- Related Items:**
  - Payment Txn's (0)
  - Recurring Payment Txns (0)
  - Change Schedules (0)
  - Change Schedule Logs (0)
  - Opportunities (0)
  - Notes & Attachments (0)

## 3.2. Update details and confirm

 **Update Regular Payment Details**

\*Month  \*Year