

How to manage credit card and expiry details

Credit Card number and CCV details are never stored in Salesforce. Payments2Us uses a token to charge the card at future dates - this token is stored in the Billing Token field.

If a card has expired or is invalid, then you will need to re-tokenise it.

You can get a list of expired cards by filtering on the Card Expiry Date on the Recurring Payment Object by either:

1. Selecting a list view filter on the Recurring Payments Tab (for example "All Active Cards Expiring" or "All Suspended - Max Retries Exceeded"
2. Running a custom report over the Recurring Payments Object
3. Being alerted by a workflow rule (approx 45 days prior) of cards expiring

1. To update Card Details - Locate Recurring Payment entry

	RECUR...	RECO...	ACCOUNT	A...	CONTACT	C...	PAYMEN...	NEXT P...	E...	R...	R...	E...	P...	FREQ...
1	<input type="checkbox"/>	Bob Barker D...	Credit Card		Avi Green			7/05/2019	Active					Daily
2	<input type="checkbox"/>	Charity Donat...	Direct Debit		Avi Green	AUD 100.00		14/05/20...	Active					Weekly
3	<input type="checkbox"/>	Lease Payment	Direct Debit	Edge Commu...	Rose Gonzalez	AUD 2,000.00		7/06/2019	Active	2				Monthly
4	<input type="checkbox"/>	Loan repaym...	Credit Card		Anusree Mur...			6/06/2019	Active					Monthly
5	<input type="checkbox"/>	Rental	Direct Debit	Get Cloudy	Alan Johnson	AUD 1,456.00		21/05/20...	Active					Fortnightly

You can locate the recurring payment by:

- Navigating to the Recurring Payments Tab, selecting that appropriate list view (Classic - Press GO button)
- Finding the Contact, clicking into the Contact and scrolling down to the related Recurring Payments list

2. Update Card Details - Expiry Date

The screenshot shows the Payments2Us interface for a recurring payment titled "Alan Johnson Recurring Payment - Started". The "Update Expiry Date" button is highlighted with a red box. The interface includes a top navigation bar with a search bar and various menu items. Below the navigation bar, there are tabs for "Edit", "Update Card Details", "Credit Card Token Payment", "Update Expiry Date", and "Change Record Type". The "Update Expiry Date" tab is selected. The main content area displays the recurring payment status as "Active" and provides details such as the contact name "Alan Johnson", account "UST Global", amount "AUD 100.00", frequency "Monthly", and last payment date "15/08/2019". On the right side, there are several dropdown menus for "Payment Txn's (0)", "Recurring Payment Txns (0)", "Change Schedules (0)", "Change Schedule Logs (0)", "Opportunities (0)", and "Notes & Attachments (0)".

If only the Card Expiry date has changed, then it is often a lot simpler and more secure to just get the card expiry date. Press this button to update the card expiry date only.

3. Update Card Details - Card Number

The screenshot shows the Payments2Us interface for a recurring payment titled "Alan Johnson Recurring Payment - Started". The "Update Card Details" button is highlighted with a red box. The interface includes a top navigation bar with a search bar and various menu items. Below the navigation bar, there are tabs for "Edit", "Update Card Details", "Credit Card Token Payment", "Update Expiry Date", and "Change Record Type". The "Update Card Details" tab is selected. The main content area displays the recurring payment status as "Active" and provides details such as the contact name "Alan Johnson", account "UST Global", amount "AUD 100.00", frequency "Monthly", and last payment date "15/08/2019". On the right side, there are several dropdown menus for "Payment Txn's (0)", "Recurring Payment Txns (0)", "Change Schedules (0)", "Change Schedule Logs (0)", "Opportunities (0)", and "Notes & Attachments (0)".

If the card has changed then you will need to re-tokenise the card by entering the full card details by pressing Update Card Details button.

NOTE: This will re-authorise the card and in doing so, the card holder may see a \$1 charge (reservation of funds). This reservation of funds will automatically disappear from their account after 7 days.