

How to manage expired credit cards

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

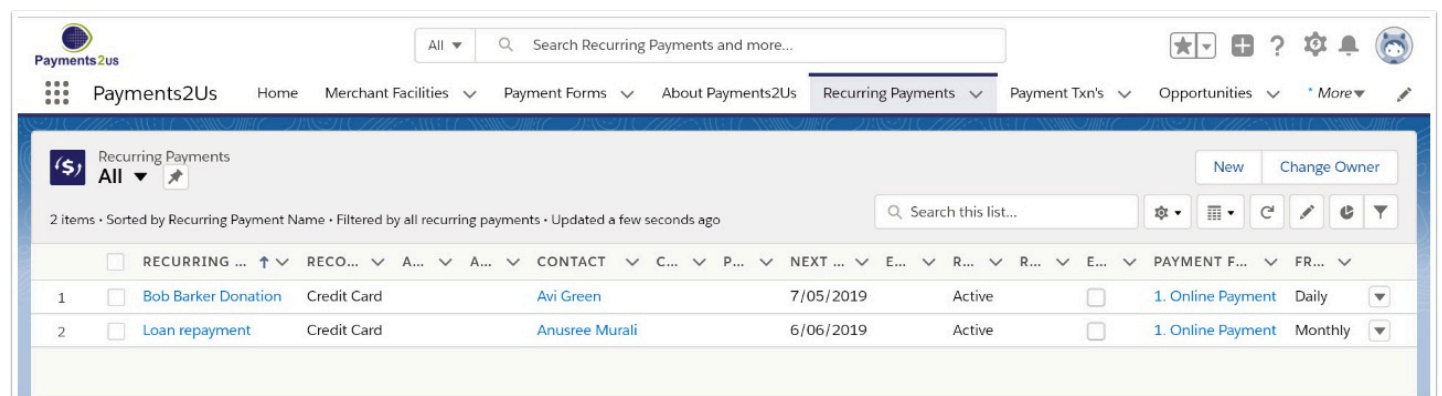
Alternatively you can also get a list of expiring cards, but navigating to the Recurring Payments Tab, then creating or selecting an existing list view filter based on the Card Expiry Date. Also, make sure you enter the details in straight away and staff do not write them down for updating later.

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.

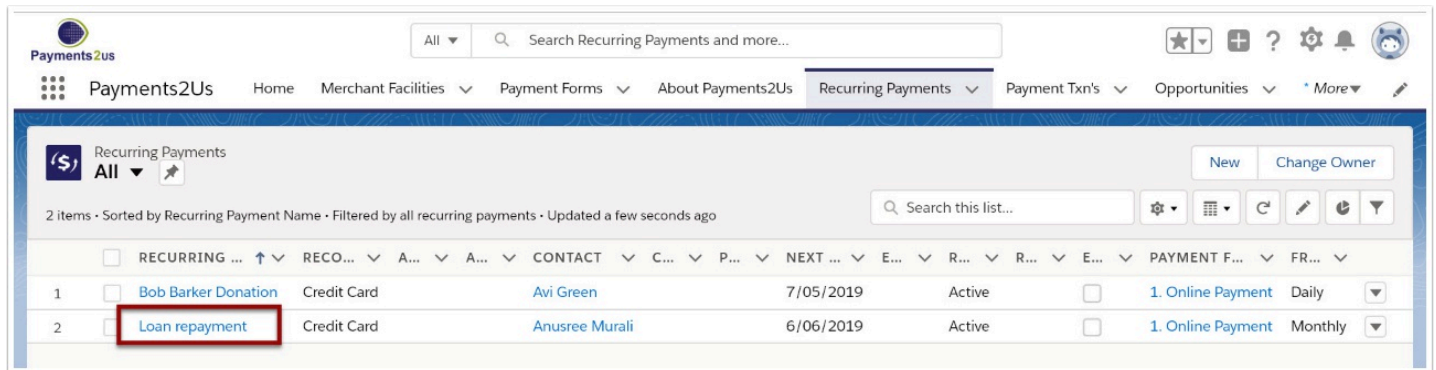
1.1. Navigate to the Recurring Payments tab



The screenshot shows the Payments2us web application interface. The top navigation bar includes the Payments2us logo, a search bar, and several menu items: 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 list contains two items: 1. Bob Barker Donation (Credit Card, Contact: Avi Green, Next: 7/05/2019, Status: Active) and 2. Loan repayment (Credit Card, Contact: Anusree Murali, Next: 6/06/2019, Status: Active). Each item has a checkbox, a link to '1. Online Payment', and a dropdown menu for frequency (Daily for Bob Barker Donation, Monthly for Loan repayment).

	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

1.2. Find the recurring payment name

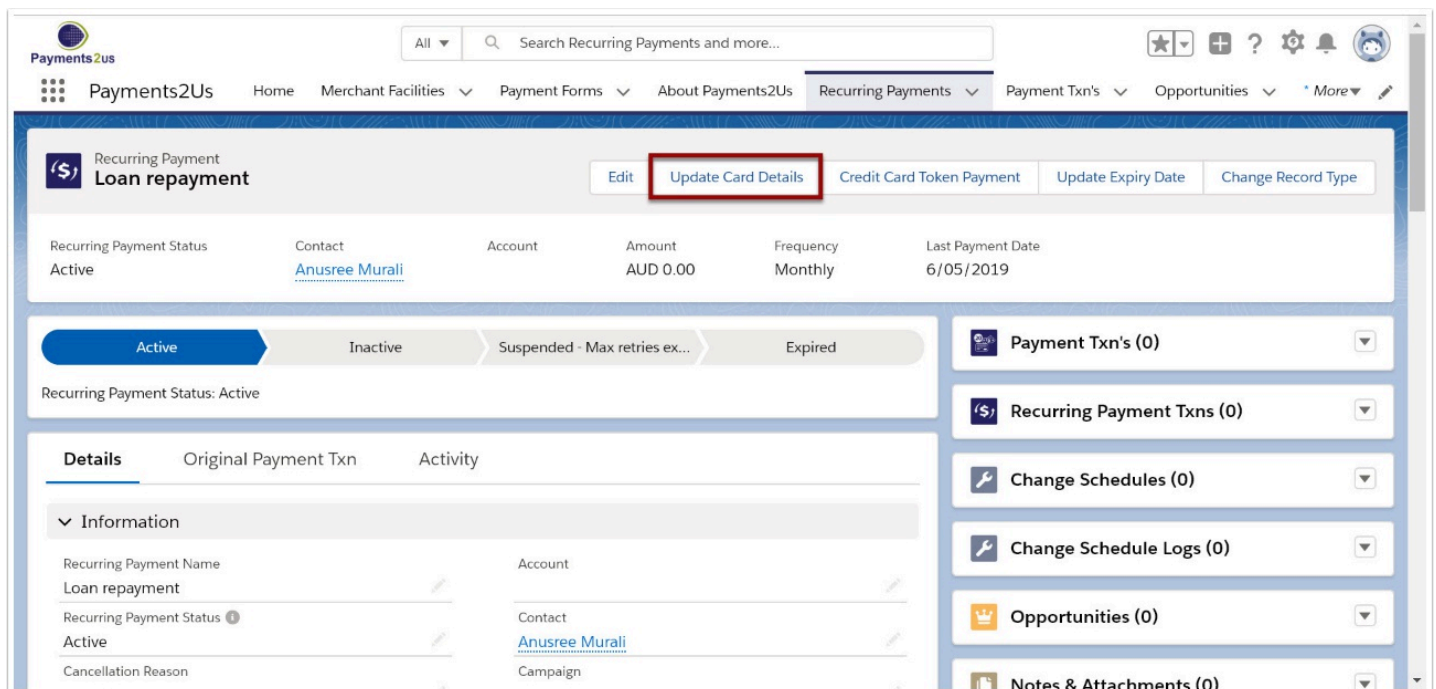


The screenshot shows the 'Recurring Payments' section of the Payments2Us interface. A table lists two items. The second item, 'Loan repayment', is highlighted with a red box. The table columns include a checkbox, the payment name, card type, contact name, start date, status, and payment frequency.

	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 'Recurring Payment' details page for 'Loan repayment'. The 'Update Card Details' button is highlighted with a red box. The page displays various details about the payment, including its status, contact information, account, amount, frequency, and last payment date. There are also tabs for 'Details', 'Original Payment Txn', and 'Activity'.

Recurring Payment Details:

- Recurring Payment Name: Loan repayment
- Recurring Payment Status: Active
- Contact: Anusree Murali
- Account: [Redacted]
- Amount: AUD 0.00
- Frequency: Monthly
- Last Payment Date: 6/05/2019

Buttons: Edit, Update Card Details, Credit Card Token Payment, Update Expiry Date, Change Record Type

Payment Txn's (0)

Recurring Payment Txns (0)

Change Schedules (0)

Change Schedule Logs (0)

Opportunities (0)

Notes & Attachments (0)

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 field containing 'Anusree Murali'.
- Credit Card Number:** Empty text field.
- Expiration Month:** Dropdown menu showing '--None--' and a year field showing '2019'.
- CCV:** Empty text field.
- Message:** Empty text area.

At the top right of the form, there are 'Cancel' and 'Confirm' buttons.

3. New Expiry Date

3.1. Select the Update Expiry Date button

The screenshot shows the 'Recurring Payment' record for 'Loan repayment'. The record details are as follows:

- Recurring Payment Status:** Active
- Contact:** [Anusree Murali](#)
- Account:**
- Amount:** AUD 0.00
- Frequency:** Monthly
- Last Payment Date:** 6/05/2019

Below the record details, there are tabs for 'Active', 'Inactive', 'Suspended - Max retries ex...', and 'Expired'. The 'Active' tab is selected.


At the top of the record, there are buttons for 'Edit', 'Update Card Details', 'Credit Card Token Payment', 'Update Expiry Date' (highlighted with a red box), and 'Change Record Type'.

On the right side, there are several sections with dropdown menus:

- Payment Txn's (0)**
- Recurring Payment Txns (0)**
- Change Schedules (0)**
- Change Schedule Logs (0)**
- Opportunities (0)**
- Notes & Attachments (0)**

At the bottom left, there is a 'Details' tab and a table with columns 'Original Payment Txn' and 'Activity'.

3.2. Update details and confirm

 **Update Regular Payment Details**

* Month

07

* Year

2024

Cancel

Confirm