Updating Customer Credit Cards

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This guide explains how to update customer credit cards. It is intended for advanced users.

After you have <u>added a customer's credit card</u> (https://aace6.knowledgeowl.com/help/adding-a-credit-card-withoutcharging) and received the PCI-compliant alias from Global Payments Integrated (previously OpenEdge), you may need to make changes to the card.

- 1. Navigate from Main Menu > CRM & Sales > Companies and locate the desired company record.
- 2. At the detail view, click Finance & Accounting tab > Edit.

Tax Details Use Tax 1099 🗙			Customer Setup Approved 🔀 🔀		Vendor Setup	Record Access Restricted					
Tax ID	W-9	W-9 Exp Date	Tax Profile >	Billing Terms	Ship Rate Type	Rate Value	Payment Terms	Free Ship 1	ype	Three	shole
	0			Net 30	Fixed Price	33.33	Net 30				
Exemption No	Cert	Cert Exp Date	Exemption Code	Rate Card >		Disc %	Default Template f	or POs			
.000	6	06/30/22	A) Federal government	Loyal Customer	Discount						
ayment Defa	ults			Customer Finar	nce	Credit Hold	Vendor Financ	e			
Payment Method Disbursement Memo (e.g. Account #)		Finance Charge	Finance Charge Credit Limit A/R Balance Credit Balance		Finance Charge	Credit Limit	A/P Balance	Credit Bal	ano		
					7,500.00 11,1	33.70 -3,633.70			0.00		
CH Setup Bank Name				Payment Accou	nts Last 4 Digits	Exp Date Name on A	ccount	Office	P	referred	
					0011	N/A		=*			^
Routing Number Account Number			0011	N/A		=*		□ ³			
count Type Class											
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- 3. In the **Payment Accounts** list view, click the item-level **Actions** icon (**T**) and select the needed option:
 - Delete Removes all card info from the Global Payments Integrated (GPI) servers.

Note: If the credit card has *not* been used in aACE, the credit card alias and credit card entry in this list are also removed from aACE. If the card *has* been used in aACE, it cannot be fully deleted because there are other records linked to it (e.g. orders, receipts, etc). Instead, the credit card record is voided, preventing it from being used again.

- Edit Currently the credit card information securely stored on GPI cannot be modified. Changing credit card info (e.g. billing address, expiration date, CVV code) requires that you delete the card, then add it again.
- Move to Another Company Transfers the credit card from the current Company record in aACE to a different company. At the Companies Selector dialog, locate and click on the new company.
- 4. Click Save.