Updating Customer Credit Cards

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This guide explains updating customer credit cards. It is intended for advanced users.

After you have added a customer credit card (https://aace6.knowledgeowl.com/help/adding-a-credit-card-without-charging) and received the PCI-compliant alias from your credit card processor, you might need to make changes to the credit card in aACE.

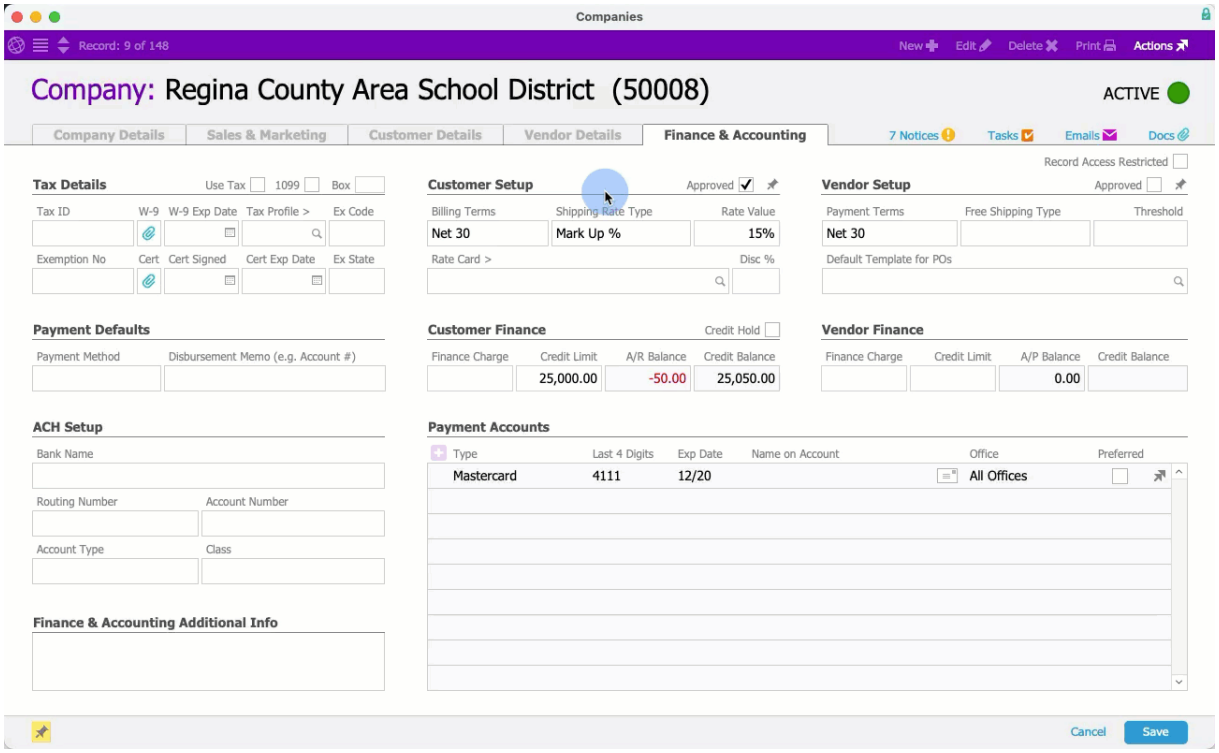
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Deleting, Editing, or Moving a Credit Card

You can delete, edit, or move a credit card to a different company record:

1. From the Main Menu, go to **CRM & Sales** > **Companies**.
2. Use the Quick Search bar to locate the desired company record, then select the **Go-To icon** (>).
3. At the detail view, select **Finance & Accounting** > **Edit**.
4. In the Payment Accounts section, select the item-level **Actions** icon ( ) for the credit card, then select the appropriate option:



- **Delete** — Removes all credit card information from the credit card processor servers. 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 credit 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 and cannot be used again.
- **Edit** — The credit card information securely stored on your credit card processor cannot be modified. You must delete the credit card and add it again to change the information (e.g. billing address, expiration date, CVV code).
- **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 select the new company.

5. Select **Save**.

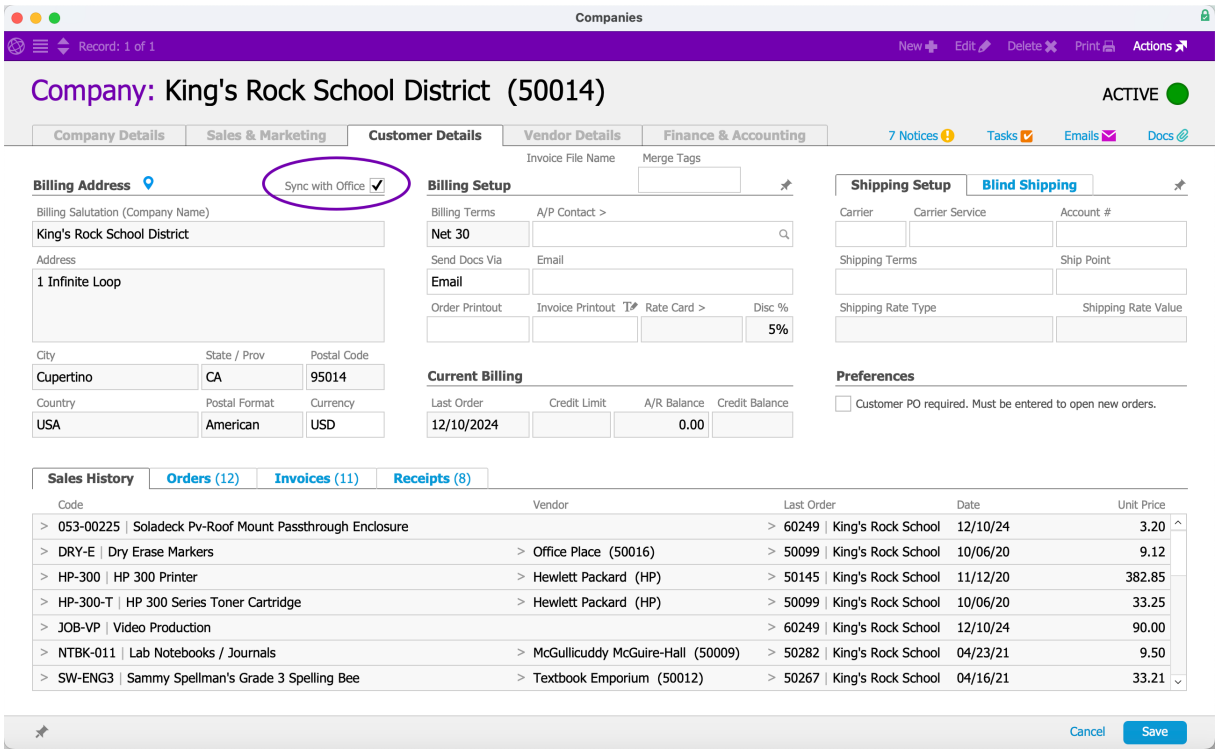
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Updating the Billing Address

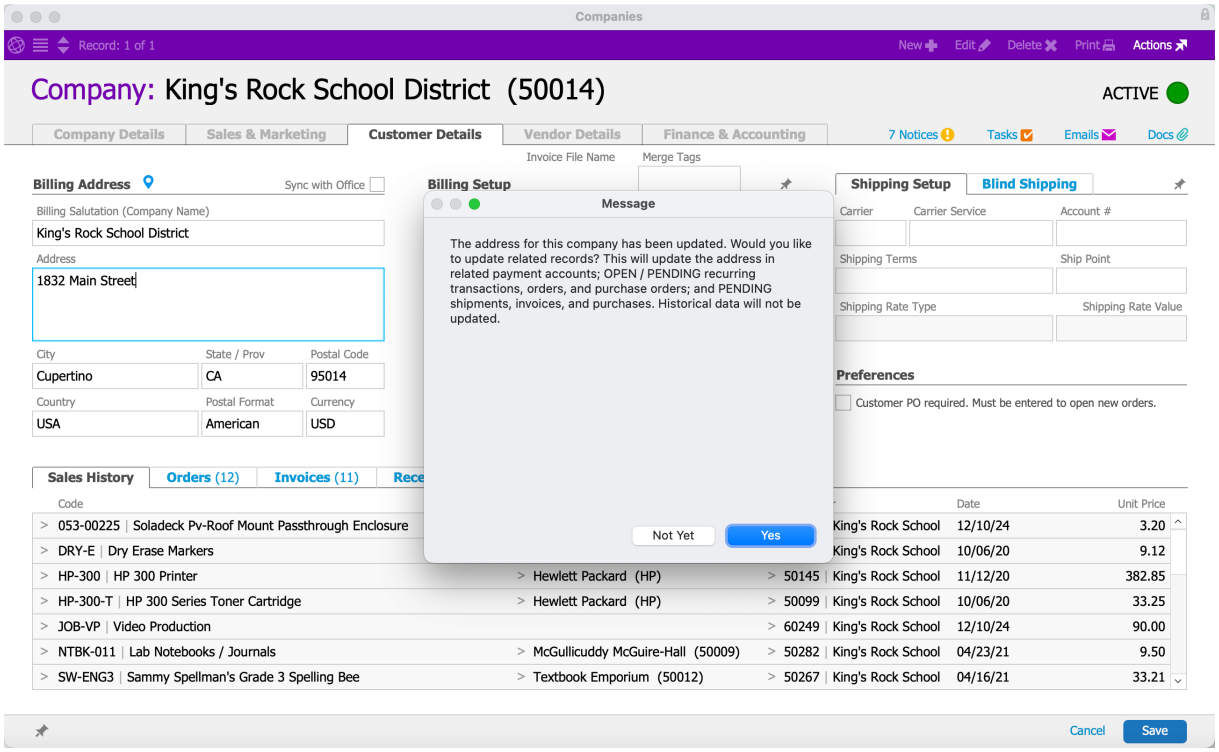
To update the billing address for credit cards, you can update the billing address for the company record:

1. From the Main Menu, go to **CRM & Sales** > **Companies**.
2. Use the Quick Search bar to locate the desired company record, then select the **Go-To icon** (>).

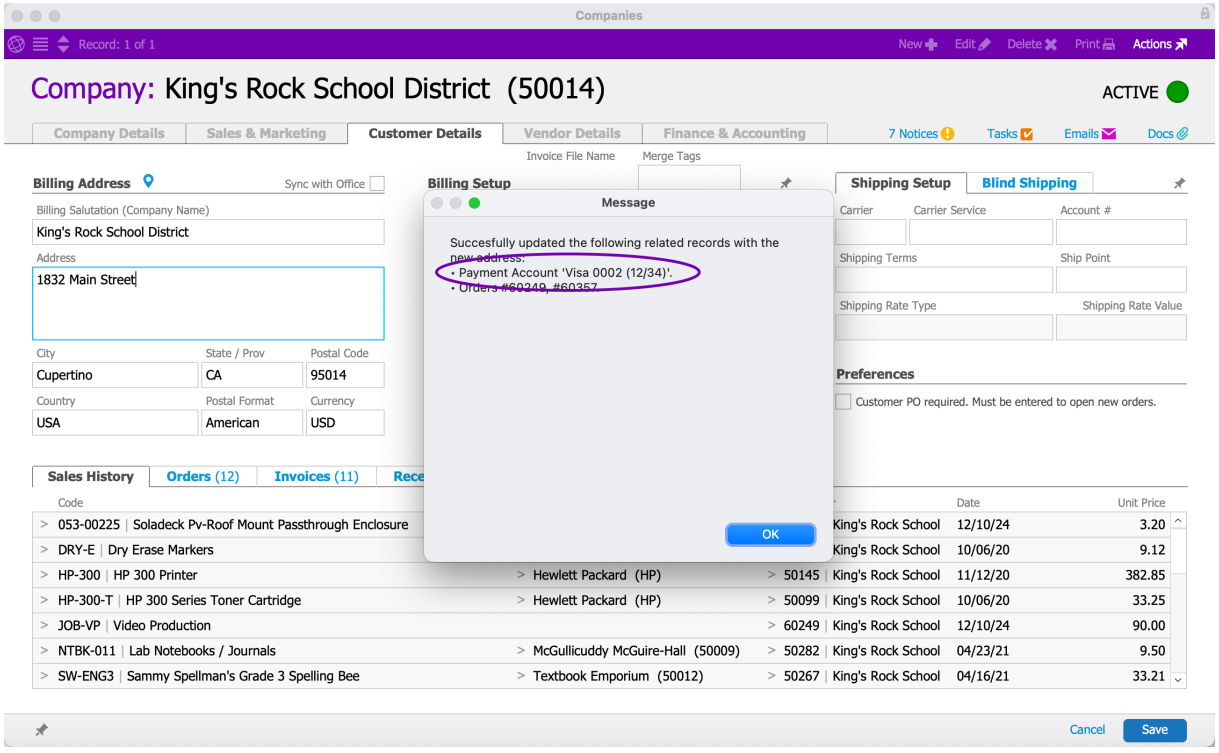
3. Select **Customer Details**, then select **Edit**.
4. If the **Sync with Office** preference is enabled, disable it.
   This allows you to enter separate office and billing addresses.



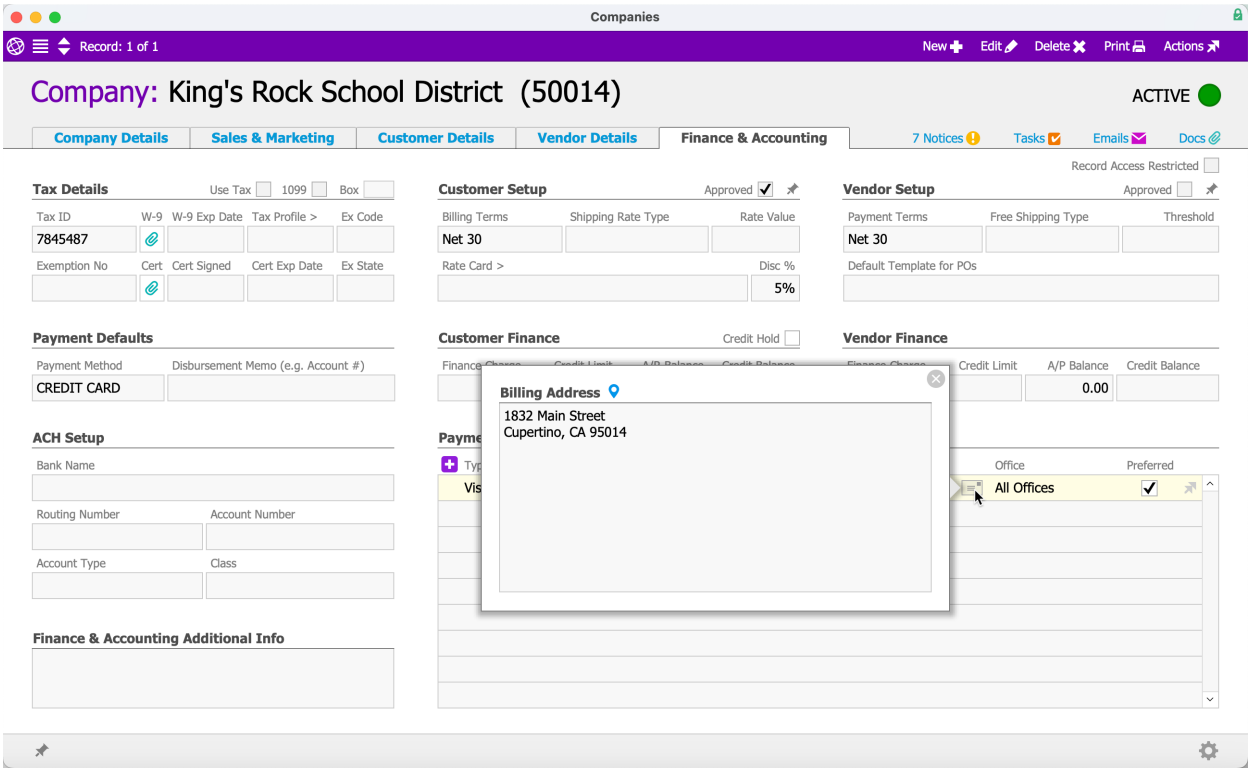
5. In the **Address field**, enter the new billing street address. Then, edit the remaining billing address fields (i.e. **City**, **State / Prov**, **Postal Code**, **Country**, **Postal Format**, **Currency**) if applicable.
6. Select **Save**.
7. Select **Yes**.
   Selecting Yes will update the address for the credit card and other Open or Pending records.



8. Select **OK**.
   aACE displays a list of updated records, including the credit card.



In the company record Finance & Accounting tab, you can confirm the billing address was updated by selecting the Address icon ( ).


Companies
Record: 1 of 1
New
Edit
Delete
Print
Actions
Company: King's Rock School District (50014)
ACTIVE
Company Details
Sales & Marketing
Customer Details
Vendor Details
Finance & Accounting
7 Notices
Tasks
Emails
Docs
Record Access Restricted
Tax Details
Use Tax
1099
Box
Tax ID
W-9
W-9 Exp Date
Tax Profile >
Ex Code
7845487
Exemption No
Cert
Cert Signed
Cert Exp Date
Ex State
Customer Setup
Approved
Billing Terms
Shipping Rate Type
Rate Value
Net 30
Rate Card >
Disc %
5%
Vendor Setup
Approved
Payment Terms
Free Shipping Type
Threshold
Net 30
Default Template for POs
Payment Defaults
Payment Method
Disbursement Memo (e.g. Account #)
CREDIT CARD
Customer Finance
Credit Hold
Vendor Finance
Credit Limit
A/P Balance
Credit Balance
0.00
Billing Address
1832 Main Street
Cupertino, CA 95014
ACH Setup
Bank Name
Routing Number
Account Number
Account Type
Class
Finance & Accounting Additional Info
Office
Preferred
All Offices