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 Approved			ed 🗾			
Tax ID	W-9	W-9 Exp Date	Tax Profile >	Billing Terms	Ship Rate Type	Rate Value	Payment Terms	Free Ship 1	Type	Thre	shold
	0			Net 30	Fixed Price	33.33	Net 30				
Exemption No	Cert	Cert Exp Date	Exemption Code	Rate Card >		Disc %	Default Template	for POs			
000	0	06/30/22	A) Federal government	Loyal Customer	Discount						
ayment Defa	ults			Customer Fina	nce	Credit Hold	Vendor Financ	e			
Payment Method Disbursement Memo (e.g. Account #)		Finance Charge Credit Limit A/R Balance Credit Balance		Finance Charge	Credit Limit	A/P Balance	Credit Ba	ilano			
					7,500.00 11,13	33.70 -3,633.70			0.00		
ACH Setup Bank Name				Payment Accou	nts Last 4 Digits	Exp Date Name on A	ccount	Office	P	referred	
					0011	N/A		=		x	1
louting Number Account Number			0011	N/A		=*		<u> </u>	1		
ccount Type		Class									

- 3. In the **Payment Accounts** list view, click the item-level **Actions** icon (**¬**) 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.