

What to know when changing your Default Merchant

Setting up a new merchant checklist

- Each merchant provider has specific terms of service, it is important to review these  before deciding on a merchant. For additional information, [click here](#) and for our terms of service, [click here](#) then scroll down to #4 [Reservation of Rights](#)
-  Verify that your new merchant is **NOT** in test mode. If it's in test mode, it will "successfully" process payment, but no funds will actually be collected.
-  Verify payment is going through on the new merchant **BEFORE** cancelling your old merchant
-  If you cancel your old merchant, you will no longer be able to issue refunds via that merchant, and must consider an alternative method.

Common Issues

- Orders placed through PayPal are **unable** to change to another merchant. This is because [reference transactions](#) are tied to billing agreements on the PayPal account, if you make a new PayPal account those reference transactions/billing agreements will not work, and will cause subscriptions and payment plans to fail.
- Historical orders that require a CVV/CVC/CID can be manually moved to Infusionsoft Payments but our Data team will need to tokenize the saved CVV/CVC/CID for you. To contact one of our representatives who can help get the process started, [click here](#) .
- We are **unable** to move historical orders for other merchants that require a CVV/CVC/CID because we are unable to tokenize their credit cards.
- For **HISTORICAL** orders, there are several different locations that the previous merchant will still be recorded. You must update:
 - Any open orders with a balance due, including:
 - a. Orders where the payment defaulted
 - b. Orders with a payment plan

- c. Previously created subscription records
- d. Open orders under the subscription record that are unpaid

Go through each step to correctly update to your new Default Merchant

Step 1: Update Your Default Merchant

Step 2: Change the Default Merchant for Manual Orders

Step 3: Update Your Merchant Settings on Order Forms

Step 4: Update Merchant used on Subscription Records

Step 5: Update previously created Subscription Orders

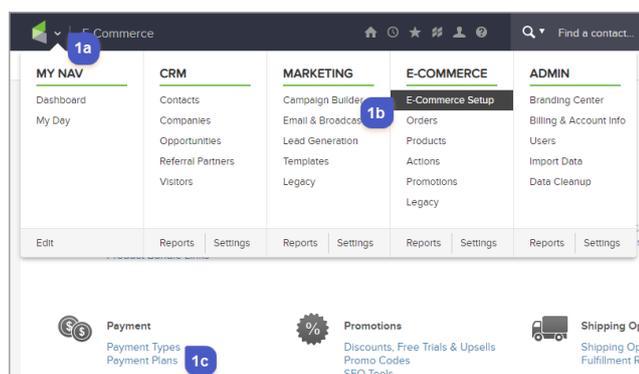
What are Max Retries and Outstanding time-frame Settings?

Step 1: Update Your Default Merchant

This is for shopping cart and order form orders.

1. E-Commerce Setup > Payment Types

- a. Check the radio button next to the preferred default merchant IF you have more than one merchant. If there's only one merchant setup there wont be a checkbox.



Other Credit Card Processors 1d Use as default credit card processor

Merchant account to use:
Active Merchant ▼ Edit... Add new...

Require CVC

Credit card types accepted:
American Express
MasterCard
Visa
Discover

Note: Not all card types are accepted by all merchants. Make sure that your merchant accepts all the same cards that you have been accepting, AND in the same manner (e.g. Master vs. MasterCard).

For step 2, [click here](#)

Step 2: Change the Default Merchant for Manual Orders

This is for any instance where the merchant is required but not given, most commonly with manual orders.

Pro Tip! You don't have to use the same merchant for all orders. You can specify a different merchant on manual order and on order forms.

1. E-Commerce > Settings > Orders > Default Merchant for Manual Orders

E-Commerce

2a

MY NAV	CRM	MARKETING	E-COMMERCE
Dashboard	Contacts	Campaign Builder	E-Commerce Setup
My Day	Companies	Email & Broadcasts	Orders
	Opportunities	Lead Generation	Products
	Referral Partners	Templates	Actions
	Visitors	Legacy	Promotions
			Legacy
Edit	Reports	Settings	Reports 2b Settings

Quotes & Invoices

Orders

Order Settings	Countries
Product	Default Country: United S
Orders 2c	Billing
Quotes	Currency Locale: US Dolle
Invoices	Payment Types: Credit C Adjust Credit

Default Autocharge? Yes No

Default Charge Tax? Yes No

Default Merchant Acct for Manual Orders: Test Merchant **2d**

Please select a default merchant account for manual orders:

- Active Merchant
- Infusionsoft Payments
- Test Merchant

Default Max Retries:

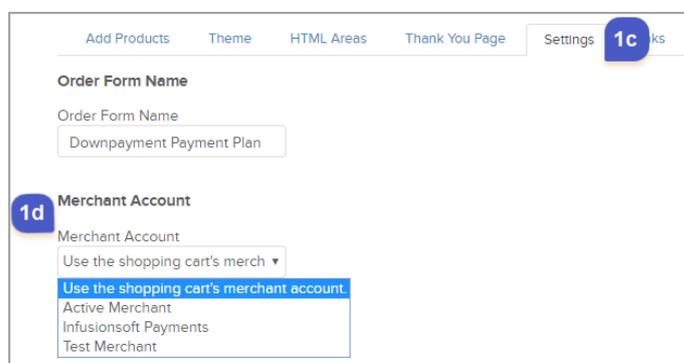
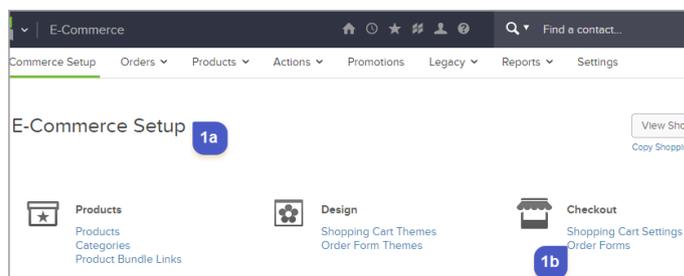
Default Num Days Between Retries:

Show Payment Interface in Orders Tab Yes No

For step 3, [click here](#)

Step 3: Update Your Order Forms Merchant Settings

1. E-Commerce Setup > Order Forms > Settings tab > Select the merchant from the "Merchant Account" drop down



For Step 4, [click here](#)

Step 4: Update Merchant used on Subscription Records

1. Go to the contact record
2. From the bottom row of tabs click the "Orders" tab

Follow-Up Sequences Campaigns Opportunities **Orders** Web Profile File Box

Add Credit Card

Validation Status	Validation Message	Charges Run	Charges Failed
This card is OK	Validated 2/6/2018	6	0
This card is OK	Validated 6/13/2018	41	0

3. Scroll down to "Subscriptions" and click the subscription name (blue hyperlink)

Subscriptions **a**

View	Qty	Start Date	Bill Amt	A
Birthday Cake b	1	2/6/2018	\$20.00	Ye

4. Under the Subscription "Recharge Information" Select the drop-down for Merchant Account and select your new Merchant account from the list

Recharge Information **c**

Auto Charge Yes No

Credit Card Visa XXXX-1195

d Merchant Account Active Merchant

Max Charge Attempts 3
Any whole number greater than zero

Num Days Between Retry 2

Recharge Information

Auto Charge Yes No

Credit Card Visa XXXX-1195

Merchant Account Active Merchant

Max Charge Attempts

Num Days Between Retry
Any whole number greater than zero

5. Click "Save"

Any whole number greater than zero

Num Days Between Retry
Any whole number greater than zero

Email the invoice to the customer upon successful payment

Description	Dt created	Charge amt	Pay stat
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For Step 5, [click here](#)

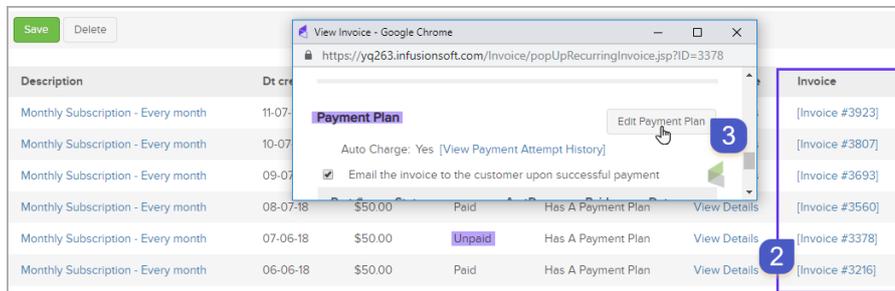
Step 5: Update previously created Subscription Orders

Note: This will be needed for past due and/or failed payments. The past due balance will attempt to auto charge if the order has not reached it's maximum attempts and is not outside of the outstanding auto charge window (E-Commerce > Settings > Order)

1. Follow the steps from "[How to locate and update subscription records](#)"
 - a. Then in a subscription record scroll down and under the "Save" button, click

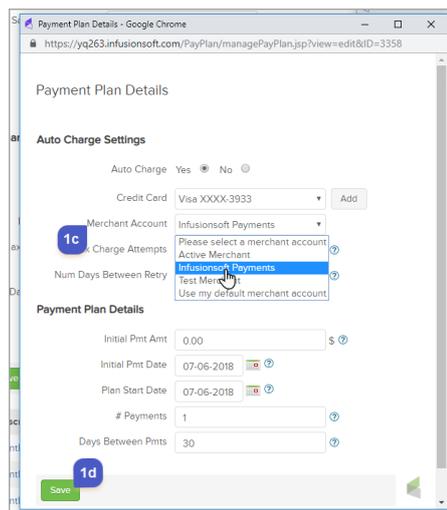
on the unpaid **"Invoice"** (blue hyperlink) for the past due and/or failed order you want to update

- b. Scroll down to **"Payment Plan"** area and then click **"Edit Payment Plan"** button



- c. Select the drop-down for Merchant Account and select your new Merchant account from the list

- d. Click **"Save"**



Note: Past due balance will attempt to auto-charge if the order(s) have not reached their maximum attempts.

What are Max Retries and Outstanding time-frame Settings?

When a payment fails, the **Max Retries** setting will attempt to process the payment based

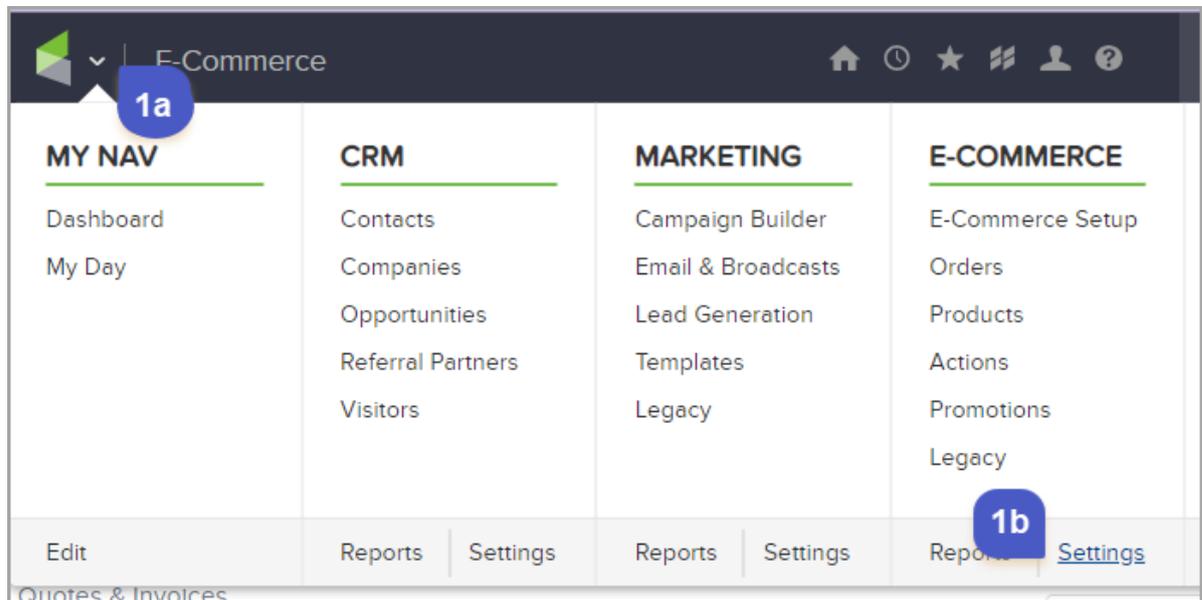
on the number entered in its field. Once the order has attempted the number of **Max Retries**, there will be no further attempts unless it is reset. By default the **Max Retries** is set to three.

As for the **Don't Autocharge Invoices That Have Been Outstanding For More Than**, select a time range limit for autocharge attempts. The system will no longer try to charge the card after this limit is reached. The default is 12 months. You can reduce this to 9,6, 3, or 1 month.

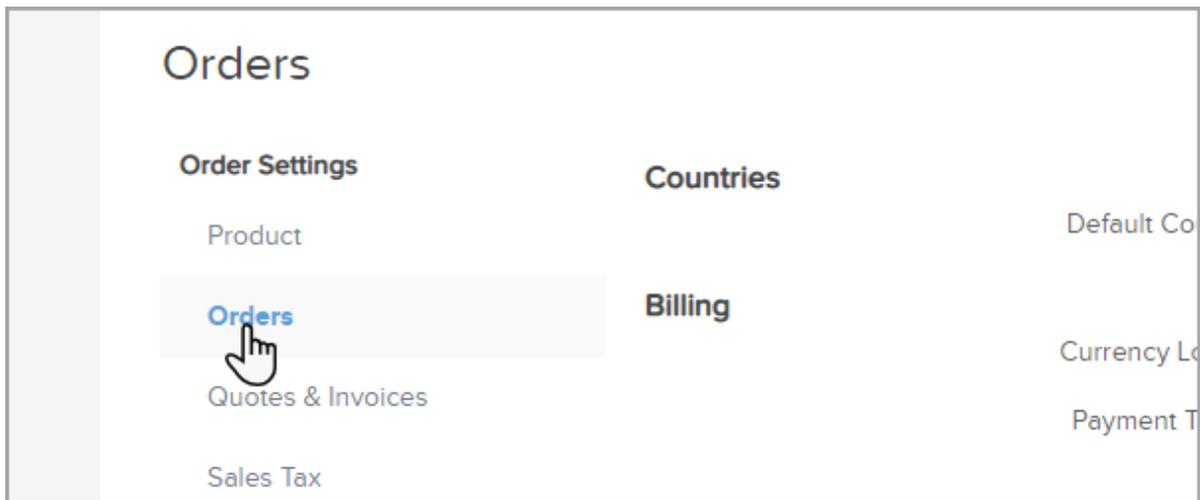
Below will walk you through the steps to enable to the settings and how to reset once the Max Retries have been reached.

Note: Changing the merchant does not reset the number of "Max Retries" attempts for an order. If an order reached the "Max Retries" limit when the merchant is changed, you will need to reset the retry attempts.

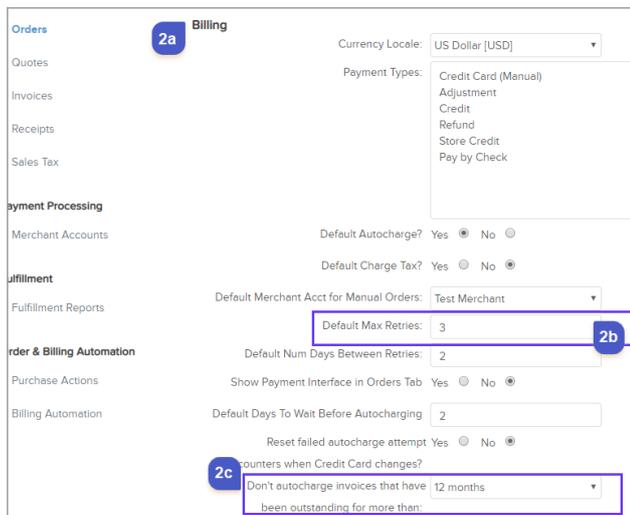
1. Go to E-Commerce > Settings



2. From the left navigation click "Orders"



- Under "Billing"
- Locate "Default Max Retries": the number in the field is the number of times an unpaid order will attempt to bill
- The drop-down next to "Don't autocharge invoice that have been outstanding for more than" is the time-frame that an order can be auto-charge after the payment method has been updated



Reset Max Retries

In order for the "Reset Failed Attempts" button to be visible in an order that has reached the Max Retries

Payment Plan

Auto Charge: Yes(Has Failed) [View Payment Attempt History]

Email the invoice to the customer upon successful payment

This payment plan has failed 3 times.

Pmt #	Status	AmtDue	Paid
Pmt 1	Unpaid (Auto)	\$354.00	\$0.00

The following must be met:

1. The "Reset failed autocharge attempt" setting must be enabled under **E-Commerce > Settings > left menu click Orders > scroll down under "Billing"**

Show Payment Interface in Orders Tab Yes No

Default Days To Wait Before Autocharging 2

Reset failed autocharge attempt Yes No
counters when Credit Card changes?

Don't autocharge invoices that have 12 months
 been outstanding for more than:

2. The maximum amount of attempts must be reached