

Billing Settings

We use the **Billing Settings** to define global defaults for payments.

1. Go to **E-Commerce > Settings** in the master nav.
2. Click on **Orders** in the settings menu.
3. In the **Billing** section, you can review and edit the following settings:
 - **Currency Locale:** This setting controls the currency displayed on products in the shopping cart, order forms, and invoices.
 - Select either US Dollar, Euro, Pounds, Rands, Australian Dollar, Canadian Dollar, or New Zealand Dollar.
 - **Payment Types:** These payment types show up when processing manual payments in an order record.
 - **Charge Defaults:**
 - **Default Auto-charge:** Set to Yes if you want the system to automatically charge credit card payments for payment plans and the recurring subscription programs.
 - **Charge Tax:** Set to Yes if you want to automatically calculate and charge sales tax for taxable products and subscription programs for all orders.
 - **Merchant Account:** Select your primary account. It displays on shopping cart themes, order forms, and manual orders, but can also be customized on a per-item basis.
 - **(Optional) Max Retries:** Change this number if you want Infusionsoft to process a failed charge more or less than the system default of 3 times.
 - **(Optional) Num Days Between Retries:** Change this number if you want Infusionsoft to wait more or less than the 2 day system default between each retry.
 - **(Optional) Show Payment Interface in Orders Tab:** Set to Yes to view a payment history from an order record. This turns on a More Payments button with a date range search.
 - **(Optional) Days to Wait Before Auto-charging:** This setting delays all pending auto-charges; e.g., if you set this to 3 days, all pending auto-charges will process 3 days late. Most businesses do not need this setting, but it may be useful when switching merchant gateways or resolving an issue with a gateway.
 - **Email Invoices Upon Successful Payment:** Set to Yes if you want Infusionsoft to send an invoice each time a manual or automatic payment is posted to Infusionsoft.
 - **Reset Failed Auto-charge Attempt Counters When Credit Card Changes:** Set to Yes if you want to zero out the auto-charge counter for a new

credit card instead of resuming the count based on failed charges on a previous card; e.g., the previous card was tried twice. If you don't reset, a failure on the new card will count as the third try instead of the first.

- **(Optional) Don't Auto-charge Invoices That Have Been Outstanding For More Than:** Select a time range limit for auto-charge attempts. The system will not charge the card after this time limit is reached. The default is 12 months. You can also choose 9, 6, 3, or 1 month.

4. Scroll to the bottom of the settings and click on **Save** to apply the update.
