

Credit Card Management

Your ECinteractive®/is.D-Force® 2 Web storefront now makes it easier than ever for both you and your customers to manage credit card information online. This expands payment options at checkout, and allows users more flexibility when purchasing for multiple accounts and departments.

To minimize security issues on the end user's storefront, all credit card information is maintained on your back office system. All credit card management capabilities provided on the end user's web storefront is shown in a single Credit Card Management page, called Credit Card Editor. Access to functionality on this page is granted by specific settings on the Admin Control Panel.

As a dealer, you can use new Admin Control Panel features to:

- Grant or restrict customer access to credit card management through a Feature group.
- Authorize each user's payment options available at checkout:
 - (default) Restrict the user to the original options (receive invoice, use account's default card, or enter a personal card).
 - Authorize access to the full list of credit cards associated with the user's account and department on your back-end system.
 - Select a more restricted subset of the list.
- Customize the text links to the user's Credit Card Editor.

With access to the Credit Card Editor, end users can:

- Add multiple credit cards be used during order Checkout.
- Edit information on credit cards for which they are authorized.
- Request deletion as needed, which sends you a notification so that you may take appropriate action on your back-end system.

System Requirements

In order to retrieve and save user's account and department credit card information between your Web storefront and your back-end system, it was necessary to make changes to the back-end Gateway program.

If you are using DDMS as your back-end system, Version 8.12.50 or higher is required to implement the enhanced Credit Card Management features; software updates are available on the DDMS support site. For other integrated business systems, contact your ECi support team.

Setting Up Credit Card Management

Grant User Access to Credit Card Editor Page

By default, access to the Credit Card Editor is disabled. To grant end users access, follow these steps:

1. In the Admin Control Panel, go to **Customer Settings** and then select **Feature**.
2. Select a feature group.
3. In the General tab (shown below) you can click **Allow credit card edit**. When checked, any user assigned to this feature group will have access to the credit card editor page.

Select the options for selected setting:

Save

General SPR Enhanced Content Competitive Pricing Secondary Index

Setting Name	
Order from Catalog	<input type="checkbox"/>
...	
Display Available Budget	<input type="checkbox"/>
Access Budgets	<input type="checkbox"/>
Allow credit card edit	<input type="checkbox"/>

Authorize Credit Cards

At checkout, users can select from a list of credit cards assigned to their selected account and department. This list can be composed in one of two ways:

- All credit cards associated with the user's selected account and department.
- A dealer-selected subset of the credit cards associated with the selected account and department.

For each user, you can customize this list.

1. In the Admin Control Panel, go to **Customer Management** and then select **Customer**.
2. In the Customer tab, click the **Authorize Credit Cards** button.

Default Account Information

Default Account	1004 - TEST ONE BLANK ACCT
Default Department	103 - CUSTOMER SERVICE DEPARTMENT
Attention	CLASHLEY

Authorize Account **Authorize Credit Cards**

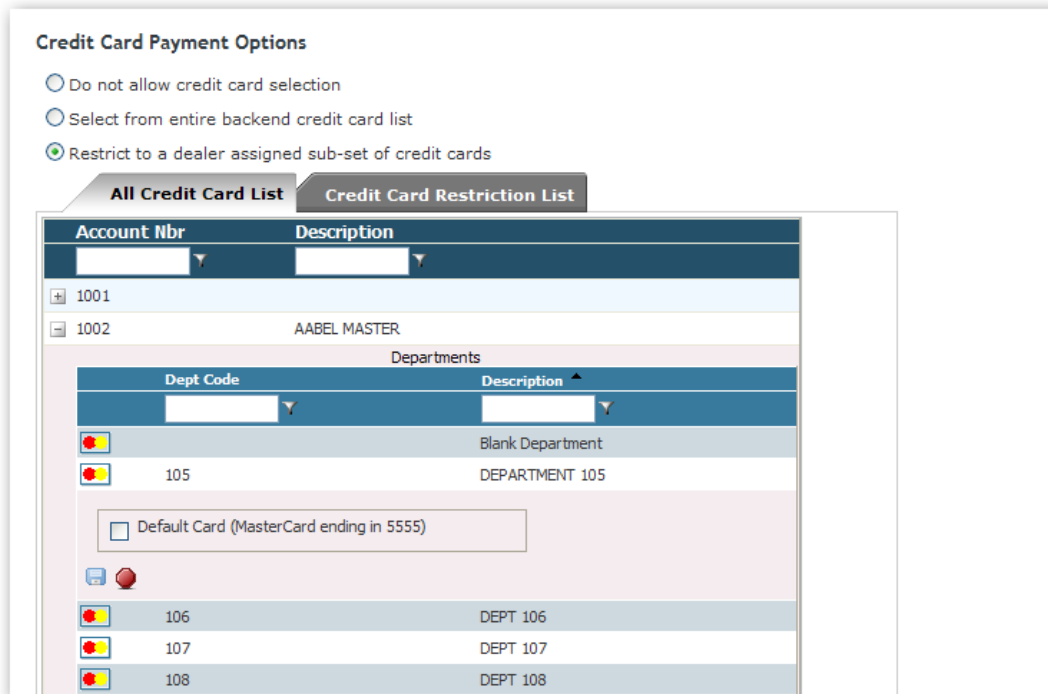
Important Note: The "Authorize Credit Cards" button does not appear for the Guest customer since this customer is never allowed select from a pre-determined list of credit cards.


3. In the Credit Card Payment Options page that opens, select the desired option to be made available to a specific customer at checkout:

Credit Card Payment Options

- Do not allow credit card selection
- Select from entire backend credit card list
- Restrict to a dealer assigned sub-set of credit cards

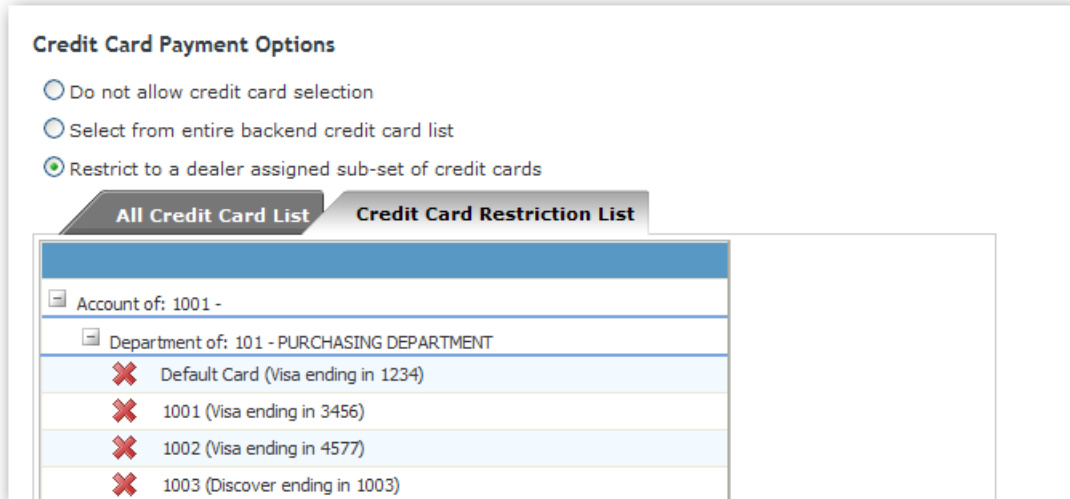
- o **Do not allow card selection:** (Default value) This setting keeps the original three options at checkout:
 - Receive an invoice for the order
 - Use the default card assigned to the currently selected account and department
 - Enter a personal credit card.
 - o **Select from entire backend credit card list:** This allows the user to select from a list of all credit cards associated with the selected account and department. It also allows the user to enter new cards to be saved on your back-end system.
 - o **Restrict to a dealer assigned sub-set of credit cards:** This restricts the user to a specific list of credit cards based on account/departments. The user will not be able to save newly entered cards.
4. If you select **Restrict to a dealer assigned sub-set of credit cards**, two tabs will appear: **All Credit Card List** and **Credit Card Restriction List**. The grid displays an expandable row for each account currently associated with the customer.



5. Click the + button to view a list of departments for that account.
6. Click the  Credit Card button on a department row to view a list of credit cards available for that account/department combination. The account's GL/Inv code is used to retrieve the credit card list from your back-end system, including a short name, type, and last four digits.
7. To restrict the user to a card or a subset of cards on the list, use the checkboxes.
8. For a "Quick View" list of cards to which the user is restricted, go to the second tab, **Credit Card Restriction List** (shown below). This view is intended to assist dealers in viewing the

complete restriction list without having to expand individual accounts and departments. This view is organized identically to the first tab except Account and Department rows do not expand and collapse and the only credit cards displayed are those that are in the restriction list.

9. Click the "X" icon to immediately remove that card from the user's restriction list.



Important Note

In the event a credit card in the Restriction List is deleted from the *backend* system, the text displayed for that item is "This card does not exist in the DDMS system". Clicking the "X" icon next to the item removes it from the Restriction List.

Credit Card Editor Custom Link

You have to option to customize the text of the hyperlink displayed on your web storefront that links to the Credit Card Management page. This link appears on the Checkout page as well top navigation, under "My Account" menu provided on all pages.

1. In the Admin Control Panel, go to **Global Settings** and then select **Site Preference**.
2. Click the **Edit** button.
3. In the **Manage Credit Cards Link Text** field, enter the desired text.
4. Click **Save**.

Site Preference

To edit your site preference, change the necessary fields, press the **Edit** button.

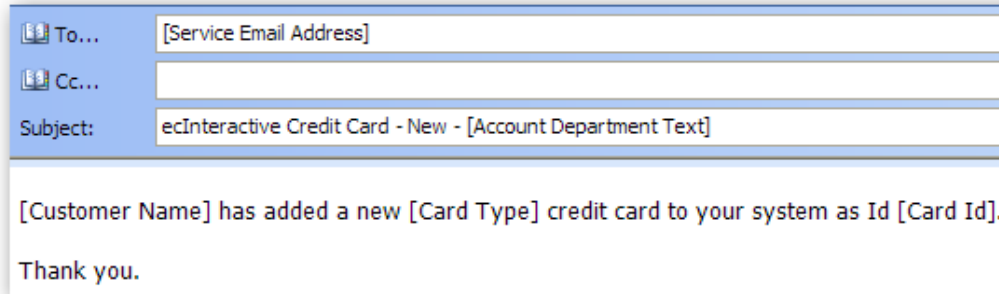
[Help](#) [Edit](#)

Max Quantity Per Line Item	25
Error Message When Exceed Max Quantity	Sorry, you have exceeded the maximum line item quantity we allow. Currently we allow 25.
Max Dollars Per Invoice	\$1,000.00
Error Message When Exceed Max Dollars	Sorry, you have exceeded the maximum invoice dollar ammount we allow. Currently we allow \$100
Default Order Taker	AAAA
Accepted Credit Cards	American Express Master Card Visa
Journal Limit for Order History	5
Allow Customer Registration	<input checked="" type="checkbox"/>
Edit Budget Link Text	Edit Budgets 1
Manage Credit Cards Link Text	Manage Credit Cards

Email Notifications of User Credit Card Additions and Changes

When a user adds or edits credit card information, the site automatically updates their Customer account credit card information on backend system.

An email advising of the update is sent to the Service email address specified in Site Info in the Admin Control Panel. Here is a sample email notification of a new credit card:



Email Notifications of User Requests to Delete a Credit Card

Similar messages are sent to the dealer advising when a user has requested that a credit card be deleted.

The site does not automatically delete credit cards from the back-end system. For example, you may wish to wait in case it is currently being used by other orders, for example. The credit card in question will continue to show up for users to select until you take action to delete it in the back-end system (for instructions, see your online help). You may also wish to remove deleted cards from the user's authorized Credit Card Restriction list in Customer Management.

End User Procedure

1. Selecting a Payment Option

A new drop-down list contains credit cards pulled from the backend system (short name, card type, and last four digits, as shown below). Users who have been authorized to manage **all** credit card information will have the ability to *add* a new credit card by checking the box "Save for next time".

Note: "Save for next time" will be disabled for any user who is restricted to a sub-set of credit cards.

2. Accessing Credit Card Management

Users who are allowed credit card edit rights will see a hyperlink in three places: at the bottom of the checkout page, in the payment method section (as shown in the figure *above*) and in the top navigation under My Account. These links open the Credit Card Editor page, where users can add, edit and delete credit card records for all of the Accounts and Departments to which they are associated in the backend system. Depending on the number of accounts and departments the user is associated, the display is different.

- **Single.** If the user is associated with only one Account and Department in the backend system, the customer's current association is a read only display.

- **Multiple.** If the user is associated with more than one Account and Department, the page displays a selection list, as shown in the following figure.

Note: If you *disable* Allow Department Select in the user's Customer Settings of the Admin Control Panel, the user will not be able to select a department, even if the customer is associated with more than one Account and Department in the backend system.

- A card ID will be created when new card information or edits are saved.

The screenshot shows a form with the following fields:

- Id:** {Created during Save.}
- Card Type:** American Express (dropdown menu)
- Number:** [Redacted]
- Expiration Date:** 1 / 2007 (dropdown menus)
- Save for next time:**

- When a user requests that a credit card be deleted, it will *not* automatically update the backend system. The end user is advised with the following message:

In order to ensure a specific credit card can be safely deleted from the system, this site does not automatically delete credit cards. An email has been sent to support requesting that the 'VISA 1044' credit card be deleted as soon as it is safe to do so (i.e. the card is not currently being used by other orders).

Please note that, until the card is actually deleted, it will continue to show up on this page as well as other pages where you can select credit cards as a payment method.

[Back](#)

Note: As stated in the delete message shown on the page, credit cards marked for deletion will continue to appear not only on the Credit Card Editor page but also on any other page where the customer is allowed to select from a list of cards.