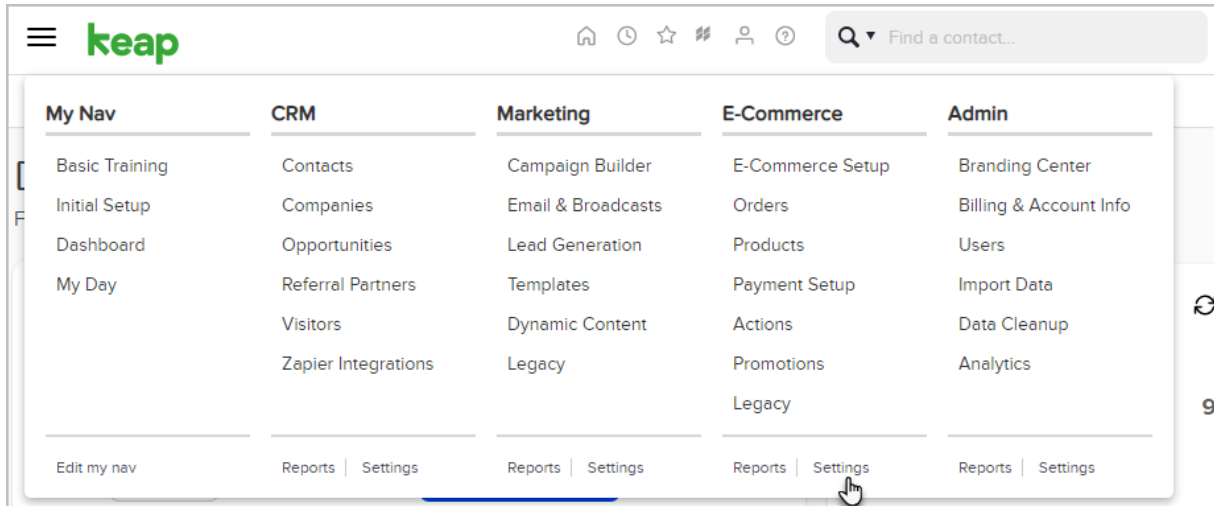


Billing Settings

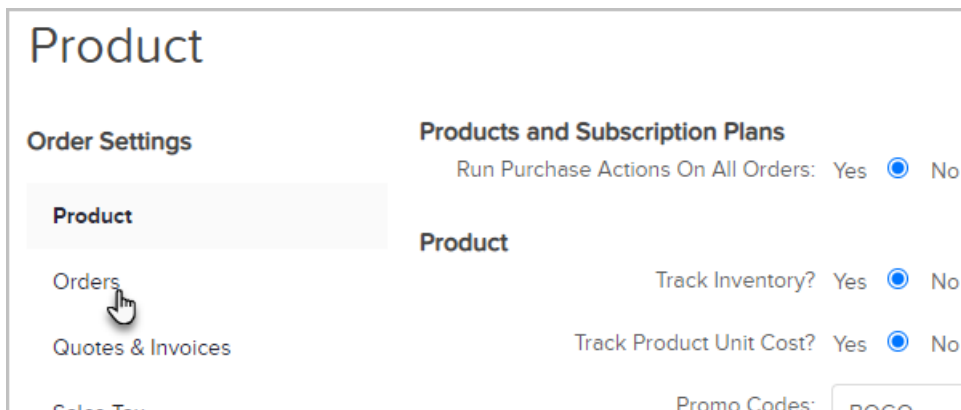
This article applies to:

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

1. Go to **E-Commerce > Settings** in the main navigation menu



2. Click on **Orders** in the settings menu.

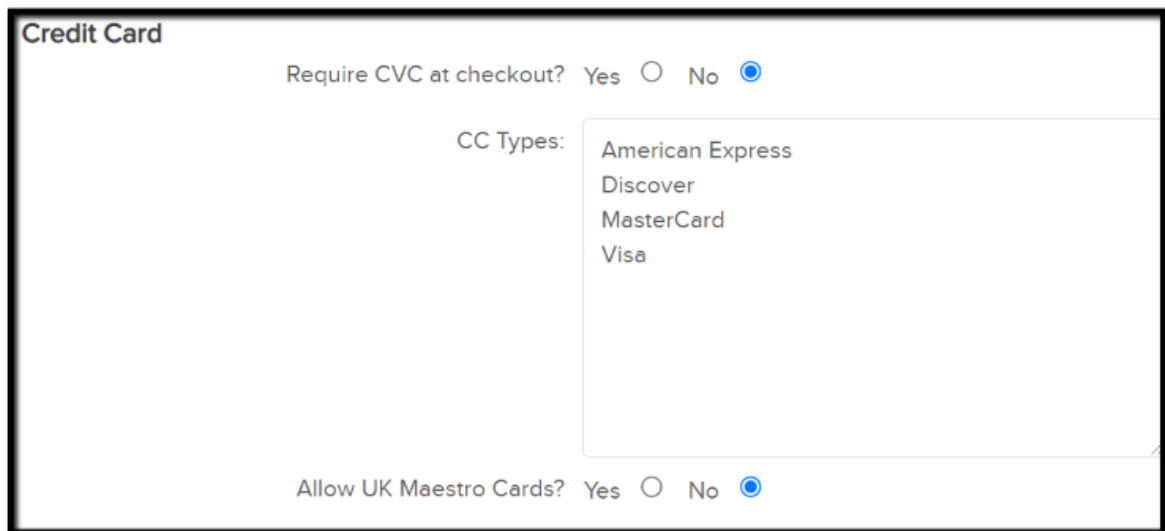


3. In the Billing section, you can review and edit the following settings:

- **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.
 - Note: This setting controls the currency display only. The actual currency is based on your merchant provider settings
- **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 Keap 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 Keap 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 Keap to send an invoice each time a manual or automatic payment is posted to Keap.
- **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. Credit Card



Credit Card

Require CVC at checkout? Yes No

CC Types:

- American Express
- Discover
- MasterCard
- Visa

Allow UK Maestro Cards? Yes No

- **Require CVC at Checkout?** Mark this either Yes or No. Note that you want to consult with your merchant account to see if it is required or not.
- **CC Types:** In this box you can add or remove accepted Credit Card types.
 - Allow UK Maestro Cards? Mark either Yes or No.
- **Update Credit Card Page Header**
 - **Preview:** This shows you what currently will show up on the Update Credit Card page Header
 - **Edit:** Allows you to make changes to the Header

- **Source:** Allows you to view the current HTML code and/or modify the code.
- **Update Credit Card Page Footer:**
 - **Preview:** This shows you what currently will show up on the Update Credit Card page Footer
 - **Edit:** Allows you to make changes to the Footer
 - **Source:** Allows you to view the current HTML code and/or modify the code.
- **Update Credit Card page Thank You Message:**
 - **Preview:** This shows you what currently will show up on the Update Credit Card page Thank You message
 - **Edit:** Allows you to make changes to the Thank You message
 - **Source:** Allows you to view the current HTML code and/or modify the code.
- **Clicked Update Credit Card link: Actions.** The actions button allows you to apply actions (such as apply a tag, send an email, etc) when a contact clicks on the Update Credit Card link in the Update Credit Card email.
- **Updated Credit Card via link: Actions.** When the contact updates his/her credit card on file you can apply select actions to run (such as apply a tag, send an email, etc.)

5. Notifications

Notifications

Notification Email Address:

Merchant Failures Before Notification:

(consecutive)

Skip Action Info on Order Notification? Yes No

- The **Notifications** area is where you can set up to be notified if your merchant account has failed multiple times to charge your customers.
 - **Notification Email Address:** You can set which **email address** should receive the notifications
 - **Merchant Failures Before Notification:** How many times a merchant should fail to process an order before the user is notified
 - **Skip Action Info on Order notification:** Would you would like for the email to contain order information or not on the notification
- This is what your notification email will resemble:

To Whom it May Concern:

This email is to notify you that your merchant account Infusionsoft Payments has failed 10 consecutive times. The last error message was:

2004 (2004): authorization failed on this credit card

Please contact your merchant provider or our Support Team for help correcting the problem.

6. Chargeback Dispute

Chargeback Dispute

Chargeback Dispute Top Text:

Chargeback Dispute Single Step Text:

Chargeback Dispute Multi Step Text:

- You can enter the data you wish to appear on your Chargeback Dispute.
- You can apply text for the **Top Text** area, for **Single Step Text**, and **Multi Step text**.

7. Fulfillment

Fulfillment

Service Orders? Yes No

Ship Orders? Yes No

Shipping Unit:

- You can select what information you would like to use for Fulfillment Orders.
- **Service Orders:** Would you need them initiated for **Services**?
- **Ship Orders:** Would you need to **Ship products**?
- **Shipping Unit:** In what **Shipping Unit** would you like to use.

8. Legacy Order Form Thank You Page

- This **Order Form Thank you Page** will only be used if you are using our old Legacy Order Forms. It can be edited to your needs.
- Select "How soon can someone place a duplicate order from an order form and it is not considered a duplicate?" This function also only pertains to orders made through a **Legacy Order Form**.
- All **New Order Forms** have the option to update a Thank You page on their individual set up pages.

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

FAQs

Q: If I increase the number of max retries in Ecommerce settings will already failed payments now retry again?

A: No, that does not affect orders already created as their Payment Plans are already "locked in"; Only new orders will be affected.

Q: When do charges automatically occur?

A: Charge attempts occur every 3 hours, but not on the hour (e.g. not 12:00 AM, 3:00 AM, 6:00 AM, etc.) The exact time may vary between each Keap Max Classic application.
