Payment Options (Merchant Accounts) In Max Classic

This article applies to:

Max Classic

It's awesome to be able to sell your products online, through your shopping cart, or through your order forms, but the money needs to get to your bank. That's where your Keap merchant account comes into play. You can use PayPal and/or a merchant account to process payments. When an order is placed through the shopping cart, an order form, or via a manually created order, Keap collects the information (e.g., customer, product(s) fees, sales tax, and shipping fees).

It then calculates an order total and passes that number and the billing information (name, address, and encrypted credit card number) securely to a payment processor.

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The payment processor takes that information and completes the actual financial transaction, charging the customer's credit card. It also handles the currency part of the transaction. Keap passes a number to the processor, and the charge is processed based on the currency you have set up in their system.

Payment Processor Type	Benefits	Compatible Order Method(s)	Item Type(s)
• PayPal	 Inexpensive to set up Easier to qualify Customers can pay with balance transfers Pay per use, no monthly fee 	 Shopping cart and order forms 	 Products and Subscriptions
 Merchant Account / Gateway Note: Paypal Payflow Pro is a gateway. It is different from a standard business PayPal account. For more information on merchant accounts, click here 	 More robust Customer makes the payment on your website Credit card statement displays your business name 	 Shopping cart, order form, and manual orders 	 Product and subscription payment plans

Setup Payment Type

1. Go to E-Commerce > E-Commerce Setup.

My Nav	CRM	Marketing	E-Commerce	Admin
Basic Training	Contacts	Campaign Builder	E-Commerce Setup	Branding Center
Initial Setup	Companies	Email & Broadcasts	Orders	Billing & Account Info
Dashboard	Opportunities	Lead Generation	Products	Users
My Day	Referral Partners	Templates	Payment Setup	Import Data
	Visitors	Dynamic Content	Actions	Data Cleanup
	Zapier Integrations	Legacy	Promotions	Analytics
			Legacy	

2. On the bottom left hand side click Payment Types.



- 3. Select Payment type:
 - a. For WePay Payments check this box. For more information regarding setup, click here.
 - b. Click use a different merchant account or payment type to setup other payment types.
 - c. For PayPal, check the box and follow the steps listed here.
 - d. Check **Other credit Card Processors** to setup a Merchant account. To view our supported merchant accounts, **click here.**
 - e. To have a **Check** mailed to you check this box.

How to connect a merchant account

1. Click Connect or Add new.



2. Select the Merchant from the drop-down.

55 CI		
	Add Merchant Account	×
ose. Subs	What type of Merchant Account would you like to create?	÷C1
Card	(Select an account type)	

3. Enter a Name, this can be any name that will help you identify the merchant, then fill in the account information for your merchant and click Save.

Add Merchant Acco	unt		×
Manage Authoriz	e.NET Account		
Authorize.NET Accou	nt Information]	
Name			
r Login ID			
Transaction Key			
Test Mode	Test Mode 🔹		
Send Transaction Email	Yes 🔍 No 🖲		
Save			

4. Check Other Credit Card Processors and select the merchant from the Merchant account to use drop-down.

Other Credit Card Processors	Use as default credit ca
Merchant account to use:	
Test Merchant	Edit Add new
Please select one	
Active Merchant	
Test K ^{Im} chant	

5. Scroll to the bottom right and click **Save**.



Setup Check Payments

Enter the information your Customers will need to send a paper check to you. Checks are not an ACH - A Direct Payment processed as an ACH pulls funds from the consumers account electronically. Please note that enabling this setting does not create a checkout for an order form and that must be configured separately.

Checks
Make Payable To
Company Name
Your Name
Addross Line 1

Note: Checks are accepted through the Shopping cart or Purchase link but not through an order form.