Beanstream payments no longer supported

This article applies to:

Max Classic

We regret to inform you that Beanstream (now Bambora) payment processing is no longer supported by Max Classic. Here's what you need to know:

One-time payments can be made via Bambora through 1/31/19.

Recurring payments stopped on 10/14/18. (Apologies for the late notice, but we just learned of these changes.)

Why the change? Bambora software updates now require a CVC code on all orders. Our software does not store CVC codes due to PCI compliance.

What now?

- 1. Setup a new merchant
 - a. If you have monthly subscriptions or credit cards that **have all been charged** in the last 6 months, consider using Keap Payments to process funds in a flash.
 - b. If you have annual subscription plans or credit cards that **have not been charged** in the last 6 months but will be, then you should find a merchant that doesn't require the CVC code, such as Authorize.net.
- 2. Connect your new merchant in Max Classic, for steps on how to do that, click here
 - a. For Max Classic specific instructions click here
 - b. For Authorize.net specific instructions click here
- 3. Transfer your Subscriptions and Payment Plans to your new merchant. Choose one of the options below:

Option 1 - Update your Subscriptions manually. Follow the steps below:

- 1. How to locate and update the subscription record
- 2. To update previously created Subscription Orders
- 3. How to locate Max Retries and Outstanding time-frame Settings

Option 2 - Have Keap Data Team help update your subscriptions. Click here to fill out the Merchant Transfer Request Form

Note! For Keap Payments, transferring existing subscriptions on your own will not have the stored CVC,

which will result in failed orders. In this case, submit this **form** and we can prevent that from happening or you if you plan on **only taking new payments** you will not need to submit the form.

How to locate and update the subscription record

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

w-Up Sequences	Campaigns Opportunitie	Orders W	eb Profile File Box
			Add Credit Card
Validation Status	Validation Message	Charges Run	Charges Falled
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				
View	Qty	Start Date	Bill Amt	A
Birthday Cake	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 🔹 Add
Merchant Account	Active Merchant
Wax 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 🔹 Add
Merchant Account	Active Merchant
Max Charge Attempts	Please select a merchant account Active Merchant
Num Days Between Retry	Infusionsoft Payments Technerchant Use my default merchant account

5. Click save

To 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"
- 2. 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
- 3. Scroll down to "Payment Plan" area and on the right click the "Edit Payment Plan" button

Save Delete	< v	/iew Invoice - Google C	hrome	-	• ×	
	e	https://yq263.infus	ionsoft.com/Invoid	ce/popUpRecurringInvoice.jsp?	ID=3378	
Description	Dt cre				^ ,	Invoice
Monthly Subscription - Every month	11-07-	Payment Plan		Edit Paymen	t Plan	[Invoice #3923]
Monthly Subscription - Every month	10-07	Auto Charge: Y	es [View Payment	t Attempt History]	3	[Invoice #3807]
Monthly Subscription - Every month	09-07	Email the invo	ice to the custome	er upon successful payment		[Invoice #3693]
Monthly Subscription - Every month	08-07-18	\$50.00	Paid	Has A Payment Plan	View Details	[Invoice #3560]
Monthly Subscription - Every month	07-06-18	\$50.00	Unpaid	Has A Payment Plan	View Details	[Invoice #3378]
Monthly Subscription - Every month	06-06-18	\$50.00	Paid	Has A Payment Plan	View Details	[Invoice #3216]

- 4. Select the drop-down for Merchant Account and select your new Merchant account from the list
- 5. Click "Save"



Note: Past due balance will attempt to auto-charge if they have not reached their maximum attempts.

How to locate Max Retries and Outstanding time-frame Settings

- 1. Go to E-Commerce > Settings
- 2. From the left navigation click "Orders"

Orders		
Order Settings Product	Countries	Default Co
Orders Quotes & Invoices	Billing	Currency Lo
Sales Tax		Fayment i

a. Under "Billing"

- b. Locate "Default Max Retries": the number in the field is the number of times an unpaid order will attempt to bill
- c. 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

Orders	Billing	
	2a Currency Locale:	US Dollar [USD]
Quotes	Payment Types:	Credit Card (Manual)
Invoices		Adjustment
		Credit
Receipts		Store Credit
Sales Tax		Pay by Check
ayment Processing		
Merchant Accounts	Default Autocharge?	Yes 🖲 No 🔘
	Default Charge Tax?	Yes 🔍 No 🖲
ulfillment	Default Marchant Acct for Manual Orders:	Tee Mansham
Fulfillment Reports	Default merchant Acct for Manual Orders.	Test Merchant
	Default Max Retries:	3 2b
rder & Billing Automation	Default Num Days Between Retries:	2
Purchase Actions	Show Payment Interface in Orders Tab	Yes 🔍 No 🖲
Billing Automation	Default Days To Wait Before Autocharging	2
	Reset failed autocharge attempt	Yes 🔍 No 🖲
	20 counters when Credit Card changes?	
	Don't autocharge invoices that have	12 months v
	been outstanding for more than:	

Merchant Transfer Request Form

If you would rather have our Data Team transfer your Subscriptions and Payment Plans to a different merchant for you, please fill out this form. We'll reach out to you via email within 1 to 3 days.

First Name *	First Name *			
Email *	Email *			
AppName *	AppName *			
What merchant account do you want to transfer to?				
Merchant Account *	Merchant Account *			
Before we can transfer orders to your new merchant, you must have it configured in Keap and able to accept payments before you submit this request.				
Yes, my merchant is configured				
*				
	Special Instructions			
Special				
Instructions				
(ex. only move Product A to new merchant account)				
Submit				