

Beanstream payments no longer supported

This article applies to:

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

| Validation Status | Validation Message | Charges Run | Charges Failed |
|-------------------|---------------------|-------------|----------------|
| 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)

| 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

Auto Charge Yes No

Credit Card Visa XXXX-1195

Merchant Account [Active Merchant](#)

Max 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

Merchant Account Active Merchant

Max Charge Attempts

Num Days Between Retry

Please select a merchant account

- Active Merchant
- Infusionsoft Payments**
- Test Merchant
- Use my default merchant account

Any whole number greater than zero

5. Click save

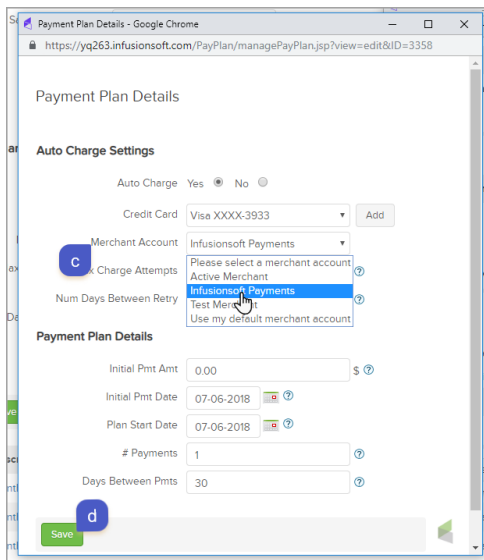
To update previously created Subscription Orders

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

The screenshot shows a subscription management interface. At the top left, there are 'Save' and 'Delete' buttons. Below is a table with columns for Description, Dt cre, Amount, Status, and View Details. One row shows a status of 'Unpaid'. A 'Payment Plan' popup window is open, showing 'Auto Charge: Yes' and an 'Email the invoice' checkbox. An 'Edit Payment Plan' button is highlighted with a blue circle and the number 3. On the right side, there is a list of invoices, with one invoice highlighted by a blue box and the number 2. A third blue box with the number 3 is also present near the 'Edit Payment Plan' button.

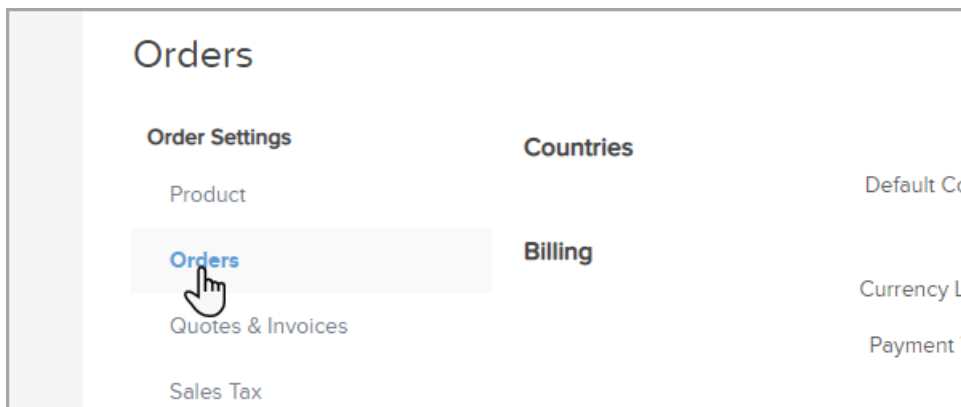
4. Select the drop-down for Merchant Account and select your new Merchant account from the list
5. Click "Save"



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"



- 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

The image shows a screenshot of a Keap Billing settings page. On the left is a navigation menu with categories: Orders, Invoices, Receipts, Sales Tax, Payment Processing, Fulfillment, and Order & Billing Automation. The main content area is titled 'Billing' and includes the following settings:

- Currency Locale: US Dollar [USD]
- Payment Types: Credit Card (Manual), Adjustment, Credit, Refund, Store Credit, Pay by Check
- Default Autocharge?: Yes No
- Default Charge Tax?: Yes No
- Default Merchant Acct for Manual Orders: Test Merchant
- Default Max Retries: 3 (callout 2b)
- Default Num Days Between Retries: 2
- Show Payment Interface in Orders Tab: Yes No
- Default Days To Wait Before Autocharging: 2
- Reset failed autocharge attempt: Yes No
- Don't autocharge invoices that have been outstanding for more than: 12 months (callout 2c)

Callout 2a points to the 'Billing' header. Callout 2b points to the 'Default Max Retries' input field. Callout 2c points to the 'Don't autocharge invoices that have been outstanding for more than' dropdown menu.

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 *

Email *

AppName *

What merchant account do you want to transfer to?

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

(ex. only move Product A to new merchant account)