

# Migrate to a supported merchant account

This article applies to:

Keap is working with a portfolio of preferred processors that meet the security and functionality needs of our customers in the future and removing processors that don't meet these requirements.

## Before switching to a new merchant account

As you transition to a new merchant account, be aware of the following:

- Review the company's guidelines to make sure you meet their terms of service.
- Verify payment is going through on the new merchant **before** cancelling your old merchant.
- If you cancel your old merchant, you will no longer be able to issue refunds via that merchant and must use an alternative method.
- Not all card types are accepted by all merchants. Make sure that your merchant accepts all the same cards that you accept and in the same manner; e.g., Master vs. MasterCard.
- Changing your merchant account does not reset the number of "[Max Retries](#)" attempts for an order. If an order reached the "Max Retries" limit when the merchant is changed, you will need to reset the retry attempts.
- Orders placed through Infusionsoft's legacy PayPal Express integration, available prior to January 2020, are unable to change to another merchant. This is because [reference transactions](#) are tied to billing agreements on the PayPal account. When a new PayPal account is created, those billing agreements will not transfer and will cause subscriptions and payment plans to fail.
- Payments initiated through a PayPal Smart Payment button cannot be transferred to a new merchant account.

## Setup a new merchant account

First, migrate to a supported merchant account to continue using Keap's payment features.

**Note:** While Infusionsoft currently supports additional merchant accounts not listed in this article, we cannot guarantee that those additional options will continue to be supported in the future.

1. Choose a merchant account.
2. Setup the merchant account and set it as your default credit card processor.
  - [Stripe](#)
  - [PayPal](#)
  - [WePay](#)
  - [Authorize.net](#)
  - [eWAY](#)
  - [Nexus Merchants](#)
3. Update the default merchant account for orders.
4. Confirm your order forms use the correct merchant account.
5. Transfer your subscriptions and payment plans to your new merchant with our [payment migration tool](#)

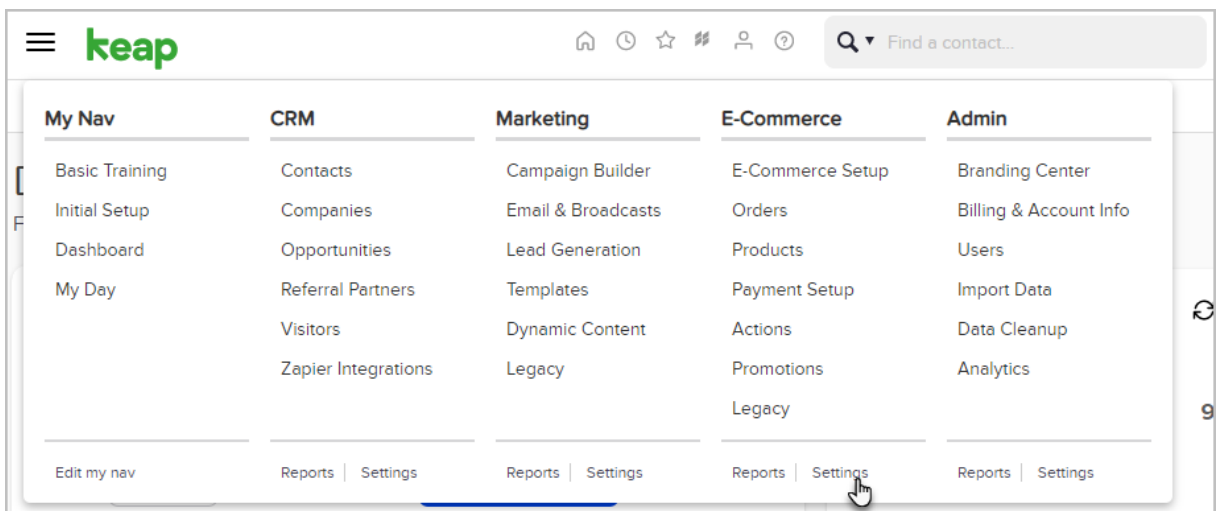
Or manually transfer your payments by completing these actions:

- Update subscription records.
- Update previously created subscription orders.
- Update any outstanding orders with a payment plan or with a balance due.

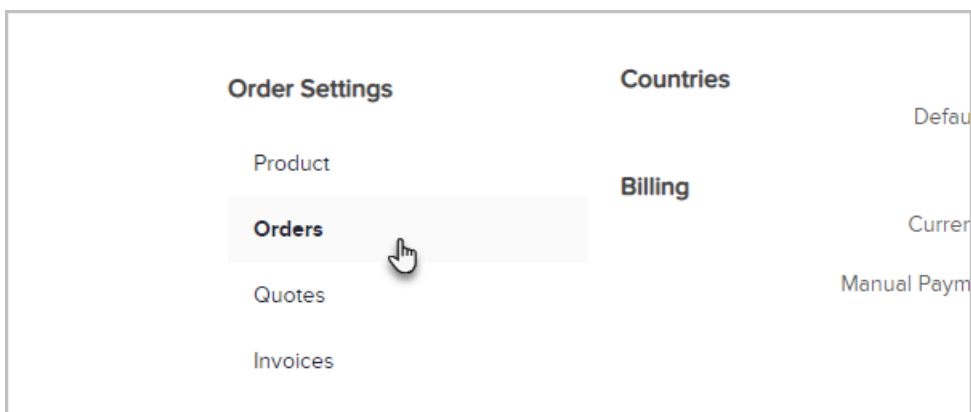
## Update the default merchant account for orders field in E-Commerce

This setting is separate from the default credit card processor on your Payment Types page. Ensure that you have updated both fields.

1. Navigate to **E-Commerce > Settings**



2. Select **Orders**



3. Update the **Default Merchant Account for Manual Orders** drop-down.

Default Autocharge? Yes  No

Default Charge Tax? Yes  No

Default Merchant Acct for Manual Orders:

Default Max Retries:

Default Num Days Between Retries:

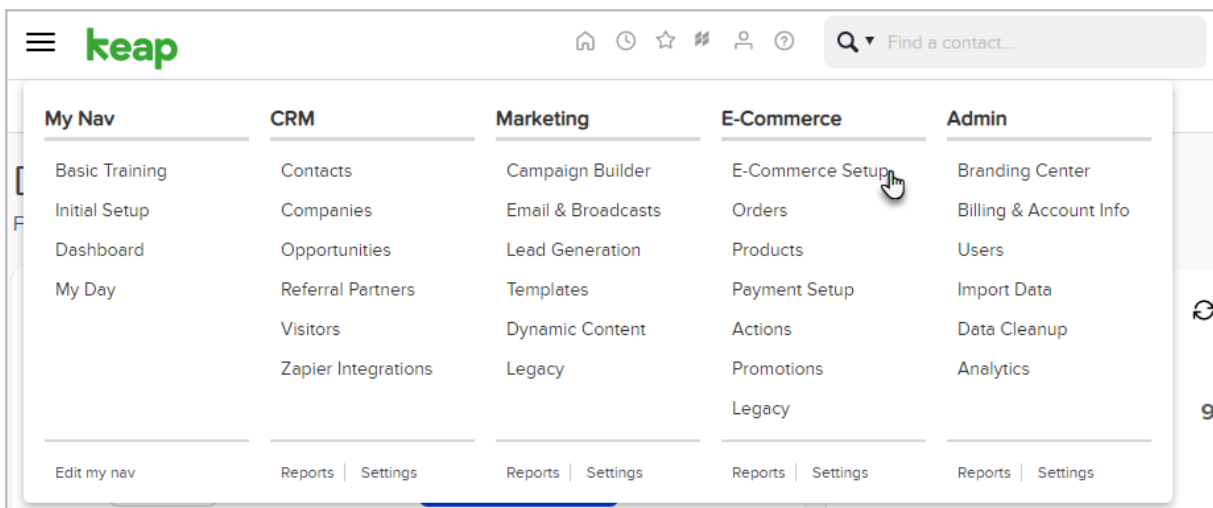
Show Payment Interface in Orders Tab Yes  No

Default Days To Wait Before Autocharging

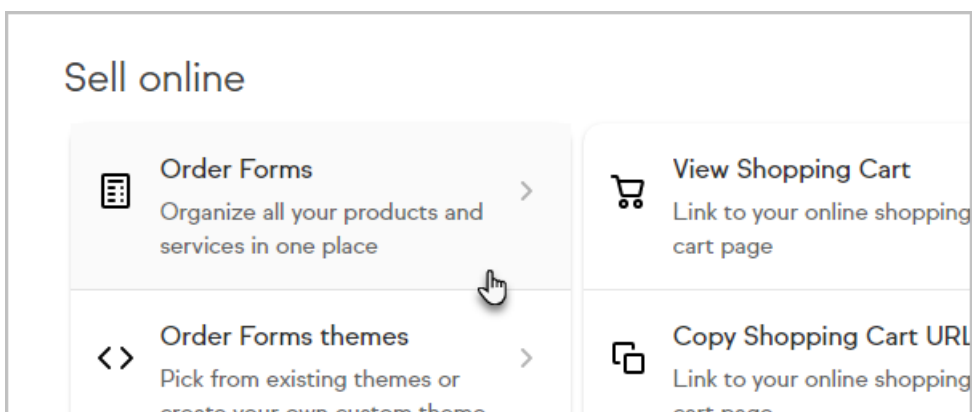
## Confirm your order forms use the correct merchant account

To ensure you receive all your payments, you must update all of your existing order forms.

1. Navigate to E-Commerce Setup



2. Click on Order Forms



3. Click on an order form

<input type="checkbox"/>	8	6 Mix Monthly	1	ChiroEdge
<input type="checkbox"/>	10	Test	1	ChiroEdge
<input type="checkbox"/>	12	upsell to event	1	ChiroEdge
<input type="checkbox"/>	72	DND - Free Product	1	ChiroEdge

4. Click on **Settings**

## 6 Mix Monthly

[« Back to Order Form List](#)

[Add Products](#) [Theme](#) [HTML Areas](#) [Thank You Page](#) [Settings](#) [Links](#)

**Add Products**

Product  ✖

[Add Product](#)

5. Confirm your merchant account updates

**Order Form Name**

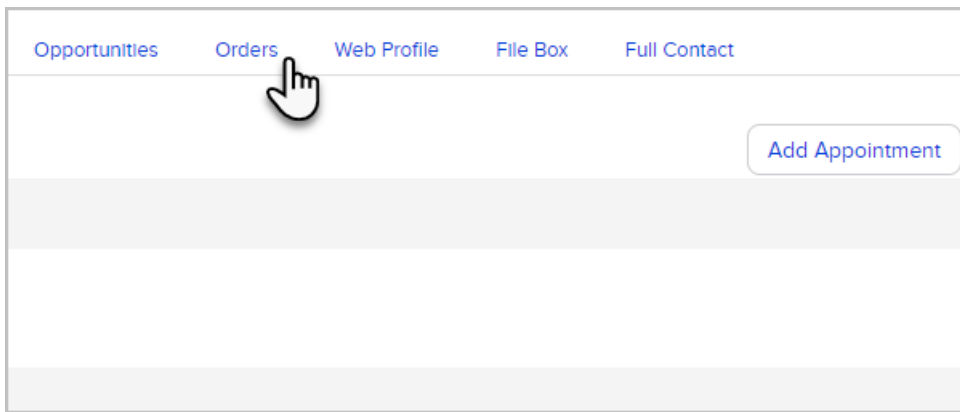
Order Form Name

**Merchant Account**

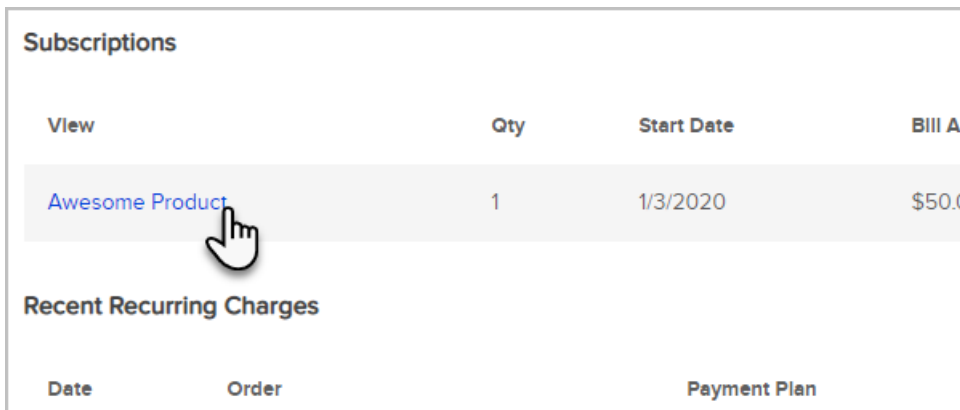
Merchant Account

## Update subscription records

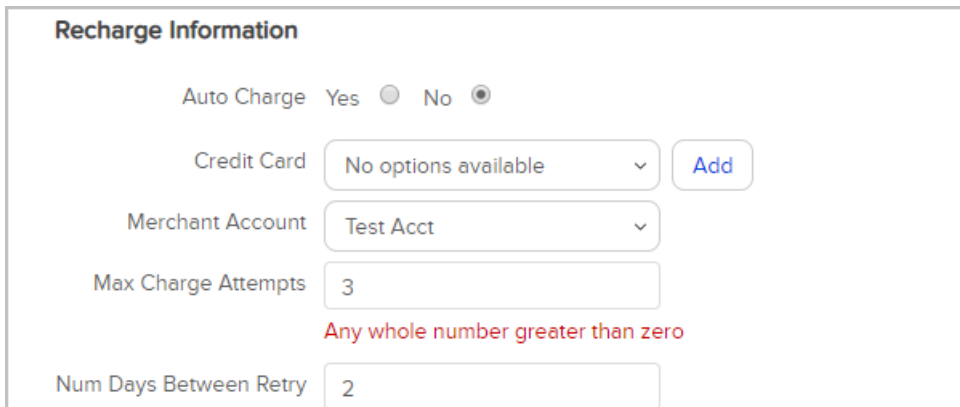
1. Navigate to the contact record
2. Click on the **Orders** tab



3. Scroll down to the **Subscriptions** section
4. Click on the subscription



5. In the **Recharge Information** section, click the **Merchant Account** drop-down to update the field



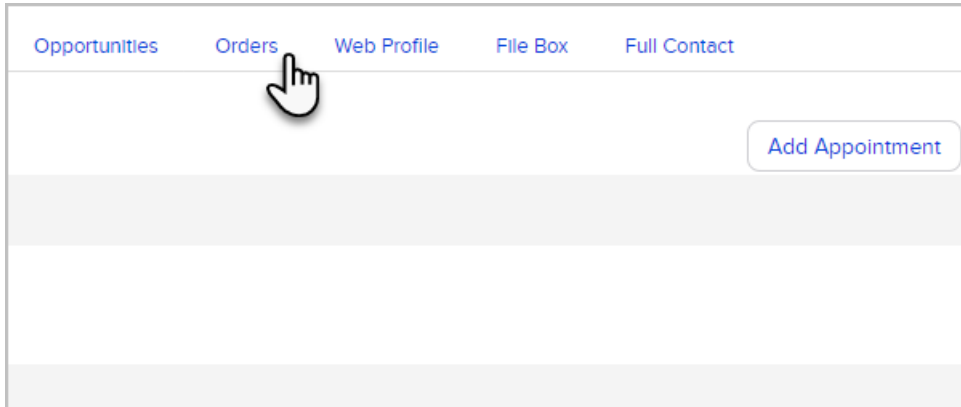
6. Click Save

## Update previously created subscription orders

**Note:** This is for past due and/or failed payments. The past due balance will attempt to auto charge if the order has not reached its maximum attempts and is not outside of the outstanding auto charge window (E-Commerce > Settings > Order).

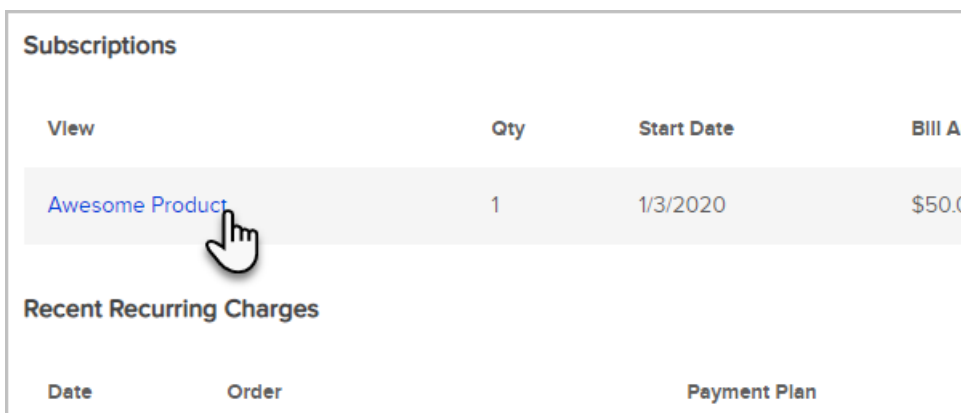
1. Navigate to the contact record

2. Click on the **Orders** tab



3. Scroll to the **Subscriptions** section

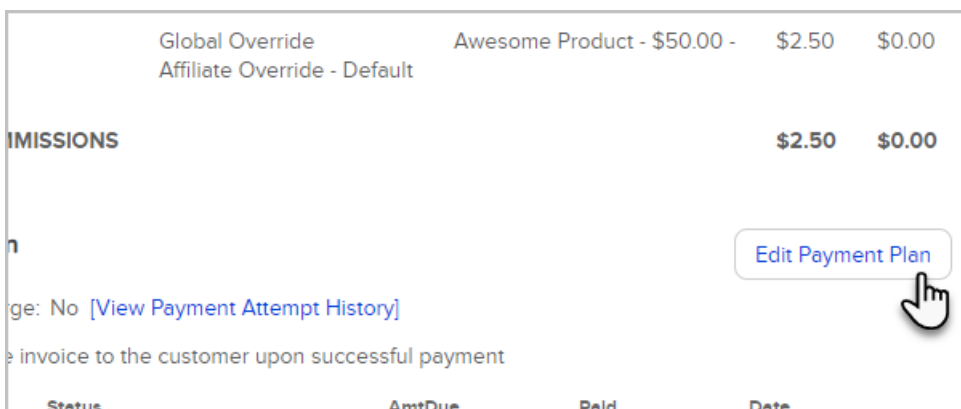
4. Click on the subscription



5. Click on the unpaid **Invoice** for the past due and/or failed orders

Charge amt	Pay status	Pay plan status	Auto-charge	Enrollment Receipt
\$50.00	Unpaid	Has A Payment Plan	No Recharge	<a href="#">[Invoice #9947]</a>
\$50.00	Unpaid	Has A Payment Plan	No Recharge	<a href="#">[Invoice #9851]</a>
\$50.00	Unpaid	Has A Payment Plan	No Recharge	<a href="#">[Invoice #9761]</a>
\$50.00	Unpaid	Has A Payment Plan	No Recharge	<a href="#">[Invoice #9675]</a>

6. In the **Payment Plan** section, click the **Edit Payment Plan** button




7. Click on the drop-down for **Merchant Account** and select your new merchant account from the list

**Auto Charge Settings**

Auto Charge Yes  No

Credit Card No options available

Merchant Account Test Acct 


Max Charge Attempts 3

Num Days Between Retry 2

8. Click **Save**


## Update any outstanding orders with a payment plan or with a balance due

1. Navigate to the contact record that has an unpaid order
2. Click on the **Orders** tab

Opportunities **Orders**  Web Profile File Box Full Contact

3. Scroll to the **Recent Orders** section
4. Click on the order

**Recent Orders**

Date	Link	Payment Plan
3/16/20	<a href="#">Jack Smithson Order</a> 	Has A Payment Plan
3/6/20	<a href="#">Jack Smithson Order</a>	Has A Payment Plan
2/21/20	N/A	Has A Payment Plan

5. In the **Payment Plan** section, click the **Edit Payment Plan** button

le	Academy Payment - \$100.00	\$5.00	\$0.00
de - Default		\$5.00	\$0.00

ful payment

[Edit Payment Plan](#)

6. Click on the drop-down for **Merchant Account** and select your new merchant account from the list

**Auto Charge Settings**

Auto Charge Yes  No

Credit Card None Selected

Merchant Account Test\_Jack

Max Charge Attempts 3

Num Days Between Retry 2

7. Click **Save**

## 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 Infusionsoft and able to accept payments **before** you submit this request.

Yes, my new merchant is configured \*

In order for your new merchant to be enabled as the default, you'll need to update it under both:

- 1) E-Commerce Setup > Payment Types
- 2) E-Commerce Settings > Orders > Default Merchant Acct for Manual Orders

Yes, my new merchant is the default \*

**Please specify below whether we are transferring ALL open orders AND active subscriptions, or whether we are updating only orders and subscriptions tied to a specific merchant.**

Feel free and let us know any other concerns or notes that we need to be aware of below.

#### Special Instructions

Special Instructions

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

Do you have orders connected to PayPal Express (legacy) or PayPal Smart Payment Options? (Note this is distinct from PayPal Commerce.)

PayPal Express/Smart Pay? \*

- Yes
- No

Would you like us to update the merchant on Order Forms that are not pointing to the default shopping cart merchant?

Update Order Forms? \*

- Yes
- No

We can be limited moving to a new merchant that requires a CVC code. Does your new merchant require a CVC?

CVC with your New Merchant?

\*

- Yes
- No

We will reach out by email to confirm the request and verify the account within 1-3 business days. **The request cannot be processed until the account is verified.**

Once the request is submitted to the data team, the request will be processed in 3-5 business days.

Submit

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