Manage a User's Credit Card

We understand the importance of having a sense of security and confidence when managing your users' credit card information.

Secure Pre-Event

Require users to have a credit card to bid, purchase, or make a donation.

Credit Card Requirement

1. Go to Admin View.
2. Visit the Users Container within the Dashboard.
3. Click the More button ("···").
4. Click Settings.
5. Scroll down to Participate.
6. Check the "Require" box to require credit cards.

PARTICIPATE
You can choose to require a user to provide the following information in order to place a bid or make a purchase.

Require*
Card on File   ☑

Secure Pre, During, or Post Event

Send a text message to all or selected users who have yet to add a credit card to their account.

Send a text to All Users

> Note: This message is sent to users who do not already have a credit card associated with their account.

1. Go to Admin View.
2. Click Messages.
3. Select Text.
4. Select New Text
5. From the dropdown labeled, Template, select Prompt for Card on File.
6. Select Apply.
7. Confirm the message is accurate.
8. Select Send.

Send a text to Selected Users

1. From the **Admin Navigation**, select **Communications** > **Text.**
2. Select New Text.
3. From the dropdown labeled, Template, select Prompt for Card on File.
4. Select Apply.
5. In the To section, enter the user's name.
6. From the dropdown, select their account.
7. Confirm the message and recipients are correct.
8. Select Send Text Message.

View if a user has a credit card on file

See the credit card icon on the user's account from check-in through checkout.

View the credit card added to a user's account

1. From the **Admin Navigation**, select **Users** > **Details**.
2. Search and select the User account.
3. Detailed information is populated on the right.
4. If a credit card is added to an account, you see Credit Card on File.
5. View the credit card details, including the last four digits on the card.

Secure at Checkout

Add a user's credit card for payment

1. From the **Admin Navigation**, select **Checkout & Payments** > **Checkout**.
2. Search for the user.
3. Select Begin Checkout.
4. Select Make a Payment.
5. Confirm the amount.
6. Select Enter Card.
7. Enter the user's credit card information.
8. Click Submit.

Save My Card Information

*Fiserv (formerly CardConnect)

To comply with credit card industry standards, GiveSmart must properly inform cardholders of how their stored credentials will be used for future one-time and recurring payments. Card information is stored in a tokenized format, which is only readable by our card processing partner, Fiserv. *No actual card data is stored in the GiveSmart Platform.*

The supporter will be presented with the Save My card Information Checkbox when:

- Placing a donation via the Donate Now section on the home page
- Placing a donation via a Champion Fundraising page
- Placing an order on an order form
- When manually adding a card on file via the My Info page or during self-checkout
- When attempting to place a bid on an item, when the credit card is set to required

Note: The Save My Card Information checkbox is independent of the card requirement settings. Turning off the credit card requirement for bidding activity does not impact the Save My Card Information checkbox.

Save My Card Information ❓

Saved card information will expedite future fundraising contributions and check-in/checkout processes associated with this organization.

If the checkbox is not selected, the payment will still be processed, but the card will not be retained in a tokenized version on the account.

NOTE: The address of a user on file in the event site should be the mailing/billing address associated with the actual credit card that is being used. Using a different address that is not associated with the credit card may result in a decline due to the AVS (address on file) being a required security setting.