

Manage a User's Credit Card

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We understand the importance of having a sense of security and confidence when it comes to managing your user's credit card information.

Secure Pre-Event

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

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 Require for credit cards required.

PARTICIPATE

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

Card on File

Require*



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: Message sent to users who do not already have a credit card on 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, user, and checkout.

<input type="checkbox"/>	BID #	NAME	SEATING GROUP	FIELD 1	FIELD 2
<input type="checkbox"/>	701	Targaryen, Daenerys 555-555-5555	Game of Thrones		

View the credit card added to a users account

1. From the **Admin Navigation**, select **Users > Details**.
2. Search and select the User account.
3. Detailed information populates 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.

USER DETAIL

Targaryen, Daenerys

Mobile: 555-555-5555

Email: Dany@Targaryen.com

Address: 1 Dragon Queen Way
Storm's End, MA 55425

Username: DaenerysTargaryen6An

Actions ▾

Event Details

Bidder Number: 701

Seating Group: Game of Thrones

Field 1:

Field 2:

Role: User

Text Engine: Short Codes

Credit Cards on File

VISA **0648 Exp: 0122 Remove

Secure at Checkout

Add a Users 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

In order to comply with Credit card industry standards, GiveSmart must properly inform a cardholder 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, CardConnect. There is no actual card data 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.