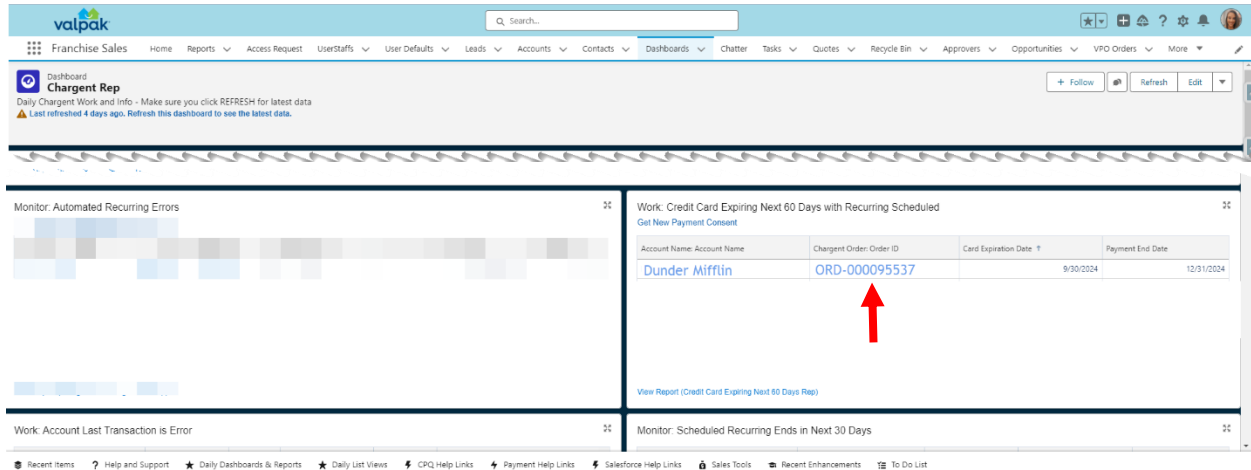
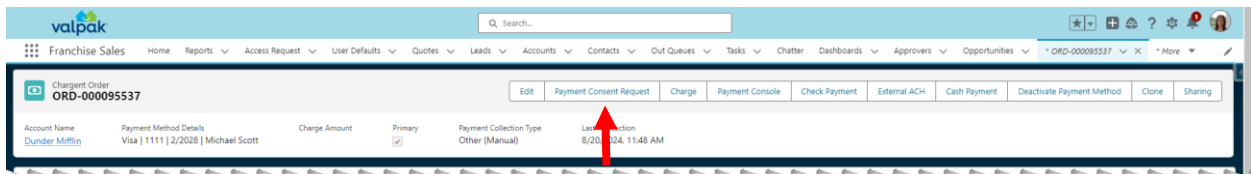


Updating an Expiring CC

1. When you see an Account appear on the “Work: Credit Card Expiring Next 60 Days with Recurring Scheduled”, you need to get a new Payment Consent sent to the Client so that we can get a new payment method on file.
2. Click on the Chargent Order: Order ID link on the dashboard.



3. On the Chargent Order record, click Payment Consent Request.



4. Select the Recipient to notify or manually add an email.
5. Fill out the Payment Consent Request and click Submit.
 - a. Note: there is a new field “Associated Contract” that you will need to select before you can submit the request.

Payment Consent Request

RECIPIENT ←

Send Payment Request Email to Client? ⓘ

* Contact to Notify

Michael Scott | katiedomangue@gmail.com

Email - If both a contact is selected and an email entered, the email will only go to the manually typed email address.

CONSENT

* Associated Contract

None ←

* Product to be Charged

All

* Payment Recurrence ⓘ

Fixed Recurring

* Frequency

Monthly

* Recurring Charge Amount - Prepopulated with first bundle amount if available

* Preferred Billing Day of the Month ⓘ

1st

* Normal Pay Schedule - Indicate if your client typically pays before or after mailing.

Submit →

NOTES

Franchise Payment Request Notes - Automatically included in email:
 Help us go paperless! Valpak is transitioning to electronic payment consents. This collaborative effort will ensure your payment information is always securely stored and easily accessible. Your time and effort towards this endeavor are greatly appreciated.

Client Additional Notes - Included in email to client if email sent and consent wizard if enabled. Best practice is to call out what consent will cover (Plus One, Blue Envelope, Past Due Invoices, etc) especially if multiple consents needed.

Consent Internal Notes - Notes to person doing actual charges. Not visible to client.