

Tech Tip Tuesday—September 2, 2014

by David Hirsch

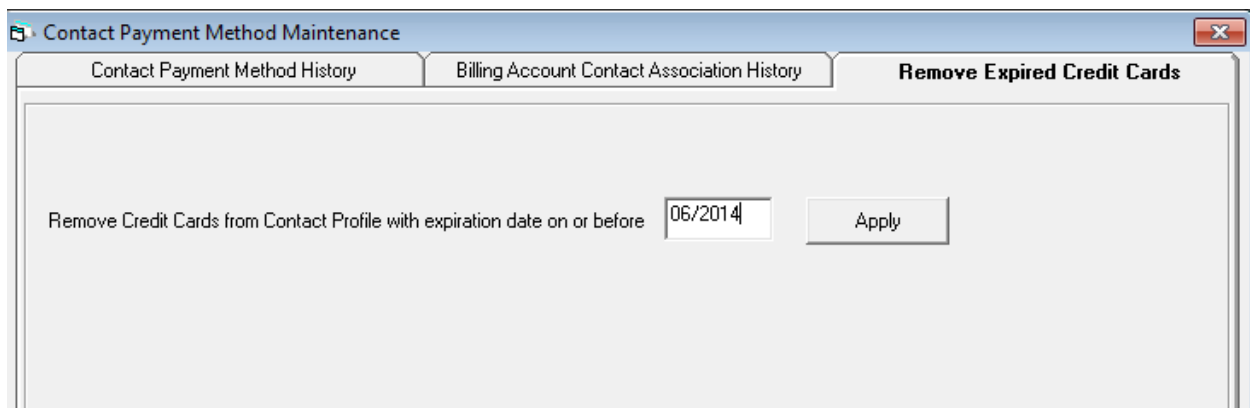
Contact Payment Method Maintenance

Over the years, you may have many profiles that get filled up with expired credit cards. While some of your customers may keep the same number for years (and just update the expiration date now and then), others have them lost or stolen, or change banks, or what have you.

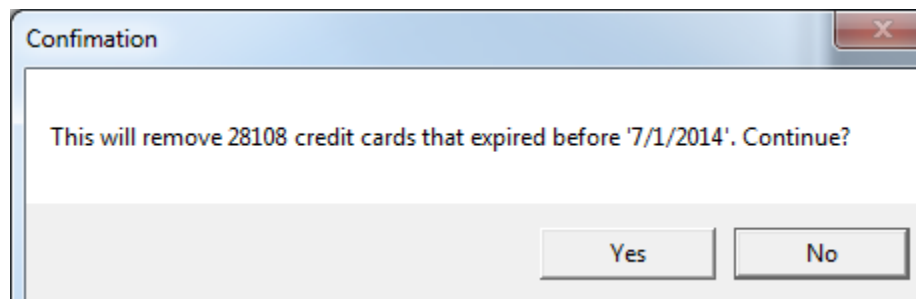
So it's a good idea now and then to purge the system of all those old, expired credit cards.

To accomplish this, simply navigate in Maintenance to Maintain...Credit Card Maintenance. There are three tabs there...you want the third one labeled "Remove Expired Credit Cards".

The function here is simple...simply enter the month and year (MM/YYYY) for which you want to remove cards (that date and before).



When you click "Apply", you will get a confirmation prompt that will tell you how many credit cards will be removed.



Click Yes, and they are gone.

BONUS TIP: The left tab (Contact Payment Method History) allows you to easily see all the payment methods on file for any given contact, where they can be edited and deleted. And, the middle tab (Billing Account Contact Association History) allows you to see all the profiles that have a particular billing account in the history. For example, if "COMP" is used as a billing account to comp a ride, you can easily see all the contacts that have gotten at least one COMP ride.