

How to remove a credit card or ACH account in PaySafe correctly

Login to www.PaymentXP.com

Your login is the Merchant ID from them (You can find it in Admin->Gateway)

Your password was reset when you completed your registration the first time.

When you login the screen will look like below.

PAYMENTXP Welcome 10012 Logout
DBA: Demo Account | ZID: 10012

DESKTOP ALERTS PRODUCTS Test Mode

DESKTOP

PREVENT PAYMENT INTERRUPTION & RECOVER LOST REVENUE

Credit Card Activities

	Today	Yesterday	MTD	YTD			
	Amount	Count	Amount	Count	Amount	Count	Amount
Declines	18,687	833,656.75	105,980	9,263,452.40	935,606	10,291,023,609.75	
	0.38	18	4.48	440	81.80		

CUSTOMER VAULT

FRAUD XP

Go to Customer Vault

PAYMENTXP Welcome 10012 Logout
DBA: Demo Account | ZID: 10012

DESKTOP ALERTS PRODUCTS Test Mode

CUSTOMERS

The customer vault is a personal customer relationship manager and database. Store all of your customers and data in our Level 1 PCI Compliant vault.

ID: Starts With Card No: Search
Name: Starts With Acct No: Clear

☒ Include Deleted Customers

	ID	Name	Card No	Bank Acct No	City	Status
Select	zur6A7ZglODruWv2U9A6Bbeb	John Doe	5***0120		Warner Robins	Active
Select	zwKngt458SWJFYChWEHrVrJ	John Doe			Warner Robins	Active
Select	zX6I99MktVQF1cMmxtGvlG3L	John Doe	5***0120		Warner Robins	Active
Select	ZtGgG2s1YMzpk55IqR7AV23	John Doe			Warner Robins	Active
Select	ZYhFuKmGCXZ1wA2NINKVK0kB	John Doe			Warner Robins	Active

Page Size: 5 Total Records Found: 243745

Filter by Name, Card or Account Number. Click Search

Note: If you previously Deleted an Account in PaymentXP, select Include Deleted Customers (Must Reactivate Deleted Customer prior to Edit)

Click Select to choose a Customer Record.

The data will display BELOW the search list. Scroll down to bottom.

Click EDIT

To remove a credit card on file

UPDATE XP

REPORTS

BATCH UPLOAD

SETTINGS

SUPPORT

TICKETS

Page Size: 5

Total Records Found: 243745

Reports: Please Select

View

Customer Information

Customer ID: zur6A7ZglODruWv2U9A6Bbeb

Customer Name: John Doe

First Name:

Last Name:

Phone:

Fax:

Email:

Billing Address

Address: 123 Main St

City: Warner Robins

State: GA

Zip: 31008

Country:

Shipping Address

Same as Billing: ☐

Address:

City:

State:

Zip:

Country:

Bank Information

Bank Name:

Name on Account:

Routing Number:

Account Number: *****

Account Type: Checking

Credit Card Information

Card Number: 612301*****0120

Card Exp. Date: 1216

Card History (MMYY)

New

Edit

Save

Cancel

Delete

Add Transaction

To remove a credit card on file, click into the **Card Number** field. **Backspace** the numbers out. Then click in the **Card Exp. Date** field and backspace the data. Then click **SAVE**.

Credit Card Information

Card Number:

Card Exp. Date:

Card History (MMYY)

New

Edit

Save

Cancel

Delete

Add Transaction

You will receive the following message at the top of the screen if the record is successfully updated.

VIRTUAL TERMINAL

Post Sale

Post Credit

Void Transaction

Post Recurring

Post Blind Credit

Level 2/3 Data

CUSTOMERS

The customer vault is a personal customer relationship manager and database. Store all of your customers and data in our Level 1 PCI Compliant vault.

Record Successfully Updated for Customer 'zur6A7ZglODruWv2U9A6Bbeb'

ID: zur6A7ZglODruWv2U

Equal To

Card No:

Search

Name:

Starts With

Acct No:

Clear

To Remove an ACH

Page Size: 5 Total Records Found: 243745

Reports: Please Select View

Customer Information

★ Customer ID: zur6A7ZglODruWv2U9A6Bbeb ★ Customer Name: John Doe

First Name: Last Name: Phone: Fax: Email:

Billing Address

Address: 123 Main St City: Warner Robins State: GA Zip: 31008 Country:

Shipping Address

Same as Billing: Address: City: State: Zip: Country:

Bank Information

Bank Name: ABC Bank Name on Account: John Doe Routing Number: 123456789 Account Number: **** Account Type: Checking

Credit Card Information

Card Number: 512301*****0120 Card Exp. Date: 1216 (MMYY) Card History

New Edit Save Cancel Delete Add Transaction

Edit at the bottom to **Edit** this Customer Record.

Click in to **each field** in the Bank Information section. **Backspace** the info. **Click SAVE.**

You will receive a message When Updated.

CUSTOMERS

The customer vault is a personal customer relationship manager and database. Store all of your customers and data in our Level 1 PCI Compliant vault.

Record Successfully Updated for Customer 'zur6A7ZglODruWv2U9A6Bbeb'

ID: zur6A7ZglODruWv2U Equal To Card No: Search

Name: Starts With Acct No: Clear

☐ Include Deleted Customers