

Credit Card Types

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Credit card types are user-defined. Credit Card Types allow you to categorize different types of credit cards such as debit cards, Visa, Diner's Club, Discover, etc. Credit card types are used in the Setup > Names > Names > Credit Cards tab. They identify the types of credit cards, expiration date, security key, etc. that can be added to a Name.

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Create a Credit Card Type


1. On the **Setup** menu, point to **Names**, and then click **Credit Card Types**. Click **New**.

 Note: If this credit card type is similar to an existing type, you can highlight the similar type and click **Copy** instead of **New**.

2. In the **Abbreviation** box, enter up to ten characters of optional information that you can easily identify the credit card type by. For example, V for Visa or MC for Master Card.
3. In the **Name** box, enter up to 30 characters of required information that describes the credit card type.
4. To add notes to this credit card type, click **Additional Notes**, enter the notes, and then click **OK**. Additional Notes are optional.


 Note: To add a time stamp to a note added or edited on the Additional Notes screen, click **Stamp**. If you are adding/editing a stamp in a database without security, the stamp will display "Edited on (current date and time)". If you are adding/editing a stamp in a database with security, the stamp will display "Edited by (username) on (current date and time)".

5. Click **Save** to save the credit card type and return to the List tab, or click **Close** to save the credit card type and close the Credit Card Types screen.

 Note: To return to the List tab without saving the credit card type, click **Cancel**. To close the Credit Card Types screen without saving the credit card type, click in the upper-right corner.

Edit an Existing Credit Card Type


1. On the **Setup** menu, point to **Names**, and then click **Credit Card Types**.
2. Select the Credit Card Type you want to change, and then click **Edit**.

 Note: If you change the information in the Name box, past credit card information is automatically linked to the new name. For example, if you change credit card type Visa to Visa Gold, your reports will no longer show credit card type Visa and any existing information for credit card type Visa is now part of credit card type Visa Gold.


3. The Credit Card Type Detail **General** tab appears. Edit or view the credit card type detail.
4. Click **Save** to save the credit card type and return to the List tab, or click Close to save the credit card type and close the Credit Card Types screen.

Combine Two Existing Credit Card Types


1. On the **Setup** menu, point to **Names**, and then click **Credit Card Types**.
2. Select the credit card type you want to combine.

 Note: You can combine only one record with one other record at one time. The record in the Combine Information From box will be combined into the record you select from the list under With and will be removed from the database.

3. Click **Combine**.
4. On the **Combine** screen, select the credit card type you want to combine your selection with.


 Note: The credit card type selected in this step will be combined into the type selected next. This type will no longer be available in the List tab after the process is complete.

5. Click **OK**.
6. At the "**Are you sure you want to combine (the credit card type you selected in Step 2) into (the credit card type you selected in Step 4)?**" message, click **Yes**.

 Note: The credit card type you selected in Step 2 will be removed and will no longer appear on the List tab. The combined information will be stored in the credit card group you selected in Step 4.

Delete a Credit Card Type

1. On the **Setup** menu, point to **Names**, and then click **Credit Card Types**.
2. Select the credit card type you want to delete, and then click **Delete**.

 Note: You cannot delete a record that is linked to other records in the system. For example, if this credit card type is assigned to a customer.

3. At the "**Are you sure you want the item deleted?**" message, click **Yes**.