

# Credit Card Expiration (Accounting)

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Pathway: Accounting > Credit Card Expiration

The Credit Card Expiration tool tracks and alerts users when a credit card for an account has expired. From this screen users can view account payment methods (and add new ones), or a Send Credit Expiration Notification to notify a customer the credit card for their account has expired.



Credit card expiration notifications are sent at 0, 7 and 30 days prior to expiration.

CREDIT CARD EXPIRATION										ACCOUNTING > CREDIT CARD EXPIRATION		
DIVISION		BILL GROUP		AUTO PAY		HAS ACTIVE SERVICES		EXPIRATION		Search		
All		All		All		All		Expired				
EXPIRATION DATE	AUTO PAY	TYPE	LAST 4 DIGITS	ACCOUNT HOLDER NAME	LAST TRANSACTION	ACCOUNT ID	ACCOUNT NAME	ACCOUNT STATUS	HAS ACTIVE SERVICES			
02/24 (Expired)	At Billing	Visa	1562	Mercy Jones	Declined on 02/19/2024	31879	Jones KEVIN / MERCY	Active	Yes			
02/24 (Expired)	At Billing	Mastercard	5189	Mattson, MARIA L	Approved \$ 46.69 on 10/31/2022	31910	Mattson, MARIA L	Active	Yes			
02/24 (Expired)	At Billing	Visa	0907	Smith RALPH	Declined on 02/19/2024	31955	Smith RALPH	Active	Yes			
02/24 (Expired)	At Billing	Visa	1111	John Wick		49012	Dollar Tree	Active	Yes			
01/24 (Expired)	At Billing	Visa	1111	John Doe		49043	Construction & Remodeling Inc	Active	Yes			

## Permissions

Permission ID	Permission Name
376	Credit Card Expiration
393	Send Alert Notification

## Filter Options

Filter Type	Description
Division	Filter option to only display accounts belonging to a selected Division.
Bill Group	Filter option to only display accounts belonging to a selecting Bill Group.
Auto Pay	Filtering option to only display accounts that are either set up on auto pay, or those that are not.
Has Active Services	Filtering option to only display accounts that have an active service.
Expiration	Filtering option to only display accounts based on expiration date, whether already expired or expiring soon.

## View and Add Account Payment Methods

The screenshot shows the 'CREDIT CARD EXPIRATION' interface. At the top, there are filters for DIVISION, BILL GROUP, AUTO PAY, HAS ACTIVE SERVICES, and EXPIRATION. Below these is a table with columns: EXPIRATION DATE, AUTO PAY, TYPE, LAST 4 DIGITS, ACCOUNT HOLDER NAME, LAST TRANSACTION, ACCOUNT ID, ACCOUNT NAME, ACCOUNT STATUS, and HAS ACTIVE SERVICES. A red 'Right-click' label points to the 'View Account Payment Methods' option in a context menu over the first row. Below the main table, a 'ACCOUNT PAYMENT METHODS' popup window is shown, containing a table with columns: ACCOUNT HOLDER NAME, TYPE, LAST 4 DIGITS, EXPIRATION DATE, STATUS, AUTO PAY, DAY OF MONTH, AUTO PAY MAX, CREATED BY, and PROCESSOR.

EXPIRATION DATE	AUTO PAY	TYPE	LAST 4 DIGITS	ACCOUNT HOLDER NAME	LAST TRANSACTION	ACCOUNT ID	ACCOUNT NAME	ACCOUNT STATUS	HAS ACTIVE SERVICES
02/24 (Expired)	At Billing	Visa	1562	Mercy Jones	Declined on 02/19/2024	31879	Jones KEVIN / MERCY	Active	Yes
02/24 (Expired)	At Billing	Mastercard	5189	Mattson, MARIA		31910	Mattson, MARIA L	Active	Yes
02/24 (Expired)	At Billing	Visa	0907	Smith RALPH	Declined on 02/19/2024	31955	Smith RALPH	Active	Yes
02/24 (Expired)	At Billing	Visa	1111	John Wick		49012	Dollar Tree	Active	Yes
01/24 (Expired)	At Billing	Visa	1111	John Doe		49043	Construction & Remodeling Inc	Active	Yes

ACCOUNT HOLDER NAME	TYPE	LAST 4 DIGITS	EXPIRATION DATE	STATUS	AUTO PAY	DAY OF MONTH	AUTO PAY MAX	CREATED BY	PROCESSOR
Mercy Jones	Visa	1562	02/24 (Expired)	Active	At Billing			Megan Mit...	Pineapple View History
Jones Checking	Bank Ac...	1086		Inactive	No			Brad Sovich	Pineapple View History

1. Right-click on the desired Account.
2. Select 'View Account Payment Methods' and the Account Payment Methods popup window will display.
3. Review the payment methods displayed.
  - o Double-click within the row of a payment method to open the *Edit Account Payment Method* screen editor.
4. Select the green '+' icon to add a new payment method for the account.

## Send Credit Card Expiration Notification

The screenshot shows the 'CREDIT CARD EXPIRATION' interface with the same table as above. A red 'Right-click' label points to the 'Send Credit Card Expiration Notification' option in a context menu over the first row. Below the main table, a 'SUCCESS' popup window is shown with the message 'Soon Notification will be Send.' and an 'OK' button.

EXPIRATION DATE	AUTO PAY	TYPE	LAST 4 DIGITS	ACCOUNT HOLDER NAME	LAST TRANSACTION	ACCOUNT ID	ACCOUNT NAME	ACCOUNT STATUS	HAS ACTIVE SERVICES
02/24 (Expired)	At Billing	Visa	1562	Mercy Jones	Declined on 02/19/2024	31879	Jones KEVIN / MERCY	Active	Yes
02/24 (Expired)	At Billing	Mastercard	5189	Mattson, MARIA		31910	Mattson, MARIA L	Active	Yes
02/24 (Expired)	At Billing	Visa	0907	Smith RALPH	Declined on 02/19/2024	31955	Smith RALPH	Active	Yes
02/24 (Expired)	At Billing	Visa	1111	John Wick		49012	Dollar Tree	Active	Yes
01/24 (Expired)	At Billing	Visa				49043	Construction & Remodeling Inc	Active	Yes

1. Right-click on the desired Account.
2. Select 'Send Credit Card Expiration Notification'.
3. A Success popup displays if the message will be sent successfully.