

Configure and Manage Project Payment Types

These procedures describe how to configure and manage the payment types supported in each project associated with a merchant. A merchant can have multiple projects and each project can support its own set of payment types, each with its own set of parameters for refunds and alternate payment.

To configure project payment types:

1. Click **System Admin** in the Administrative tasks menu. The **System Admin** page opens with the **Project Settings** page displayed.
2. Select **EDGE SETUP > Merchants** from the left navigation menu. The **EDGE MERCHANTS** list page opens.
3. Click the [View Details](#) link associated with a merchant. The **EDGE Merchant Details** page opens.
4. Click  **Add Project**. The **EDGE Projects** list page opens.
5. Click the [View Details](#) link associated with a project. The **EDGE Project Details** page opens.
6. Scroll to the **Project Payment Types** section. *(If necessary, click  to expand the section.)*

PROJECT PAYMENT TYPES:				
PAYMENT TYPE	ENABLED	REFUND ENABLED	REFUND PRIORITY	ALT REFUND PAYMENT TYPE
3rd Party Checkout	True	True	5	
Bill Me	False	False	0	
Budget Center	False	True	1	
Cash	True	False	0	
Charges Waived	True	False	0	
Checking	False	True	3	
COD	False	False	0	
Credit Card	True	True	40	
Gift Card	True	True	30	
Gift Certificate	True	False	20	
Member Budget	False	True	10	
Purchase Order Number	False	False	0	

 Edit

7. Click  **Edit** to modify the payment type parameters. The **Update Project Payment Types** page opens.

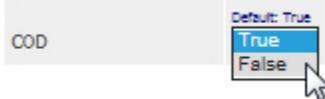
PAYMENT TYPE	ENABLED	REFUND ENABLED	REFUND PRIORITY	ALT REFUND PAYMENT TYPE
3rd Party Checkout	Default: True True	Default: True True	Default: 5 5	
Bill Me	Default: False False	Default: False False	Default: 0 0	
Budget Center	Default: False False	Default: True False	Default: 1 1	
Cash	Default: False True	Default: False False	Default: 0 0	
Charges Waived	Default: False True	Default: False False	Default: 0 0	
Checking	Default: False False	Default: True True	Default: 3 3	
COD	Default: False False	Default: False False	Default: 0 0	
Credit Card	Default: True True	Default: True True	Default: 40 40	
Gift Card	Default: True True	Default: True True	Default: 30 30	
Gift Certificate	Default: True True	Default: False False	Default: 20 20	
Member Budget	Default: False False	Default: True True	Default: 10 10	
Purchase Order Number	Default: False False	Default: False False	Default: 0 0	

Submit

Here you can do the following for each payment type:

- Enable or disable the payment type:**

Only enabled payment types are available as payment options when an order is captured in the Customer Service Portal (CSP) or Manual Order process and in an EDGE member profile. *(Member profiles are defined in the EDGE **Customer** module.)*



In the **Enabled** drop-down list:

- Select **True** to enable a payment type.
- Select **False** to disable a payment type.



Important:

A payment type that is already enabled cannot be disabled when there are any member profiles in the same project associated with that payment type. A red box is displayed around the **Enabled** field, as shown below, to indicate when a member profile is associated with a payment type.

COD	Default: False True	Default: False False	Default: 0 0	
Credit Card	Default: True True	Default: True True	Default: 40 40	
Gift Card	Default: True True	Default: True True	Default: 30 30	
Gift Certificate	Default: True True	Default: False False	Default: 20 20	

The payment type that you want to disable must be deselected in the **Payment Types** field on the **Update Member** page of the member profile for each affected member before you can disable the payment type for the project. Member profiles are created and maintained in the EDGE **Customer** module.

PAYMENT TYPES

Credit Card
 Checking
 Gift Certificate
 Member Budget
 Cash
 Charges Waived

Purchase Order Number
 Gift Card
 Bill Me
 COD
 Budget Center
 3rd Party Checkout

• **Specify whether the payment type supports refunds:**

Use the **Refund Enabled** setting to indicate whether or not refunds can be made to a payment type that supports refunds.

Credit Card

Default: True
True

Default: True
True
False

In the **Refund Enabled** drop-down list:

- Select **True** to allow refunds to the payment type.

Select **False** to disallow refunds to the payment type.



Notes:

- Only the following payment types can be refund-enabled:

- * 3rd Party Checkout
- * Credit Card
- * Gift Card
- * Budget Center
- * Checking
- * Member Budget

- When the payment was originally made using a gift card, there are now two options for how refunds can be issued for the payment:

A new e-gift card can be generated.

To always issue a new e-gift card for refunds, select **Gift Card** in the **Alt Refund Payment Type** drop-down menu.

Gift Card	Default: True True	Default: True True	Default: 30 30	Gift Card
	Default: True True	Default: False False	Default: 20 20	

OR

The refund can be issued to the same gift card that was used for the original payment.

To enable refunds to be made to the same gift card, leave the **Alt Refund Payment Type** column blank.

Gift Card	Default: True True	Default: True True	Default: 30 30	
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Important:

When configuring for the **Clutch** gift card provider only, if you want to allow refunds to the same gift card used for the original payment, contact Clutch customer support to request that "re-issuance" be enabled/allowed for this merchant.

and
When configuring for the **Shift4** gift card provider, if you want to allow refunds to the same gift card used for the original payment, the merchant's Shift4 account must be set up to specify that a PIN is NOT required for a refund back to the original gift card. Contact Shift4 customer support for information or assistance.

- As applicable, an alternate refund payment type may be specified if refunds are disallowed (not enabled) for a payment type.

- Refunds may be made to multiple payment types in cases where multiple types were used for order payment. (More information about the EDGE refund process is provided in the EDGE online help under **Orders>Return Orders**.)

• **Set the payment type refund priority:**

The **Refund Priority** setting identifies the order in which refunds are applied for orders that contain multiple payments and payment types.

The default refund priorities are as follows:

Credit Card	Default: True True	Default: True True	Default: 40 40
Gift Card	Default: True True	Default: False False	Default: 30 30
Gift Certificate	Default: True True	Default: False False	Default: 20 20
Member Budget	Default: True True	Default: False False	Default: 10 10



Note:

The higher the number, the higher the priority.

• **Specify an alternate refund payment type:**

Use the **Alt Refund Payment Type** drop-down list to specify an alternate payment type, if any, that can be used for a refund when a refund payment cannot be applied to the payment type originally used for order payment. For example, you can specify that a Gift Card can be used to issue a refund for an order originally paid for with a check.

Checking	Default: False True	Default: True True	Default: 3 13	Gift Card
	Default: False False	Default: False False	Default: 0 0	



Notes:

- Currently, only "Gift Card" can be specified as an alternate payment type.
- Only one alternate may be defined for each payment type in a project.
- When the payment was originally made using a gift card, there are now two options for how to issue refunds:
 - * A new e-gift card can be generated.
 - * The refund can be issued to the same gift card used for the original payment.Refer to the [Notes, above](#), for details.

8. Click  **Submit** to save your settings and return to the **EDGE Project Details** page.

9. Click the [RETURN TO PROJECT LIST](#) link to exit the **EDGE Project Details page** and return to the **EDGE Projects** list page.



To continue . . .

Once you have configured the payment types for the current project, continue with [Configure Payment-Related Project Settings](#).
