



# MANAGING YOUR CREDIT CARD

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VERSION 3



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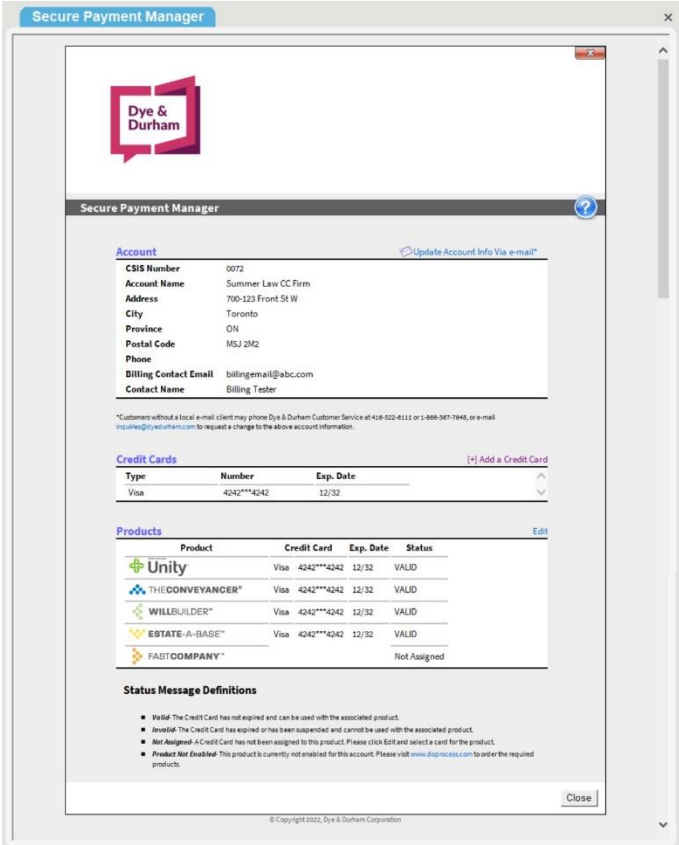
## 1. MANAGING YOUR CREDIT CARD

Credit card payments for your Dye & Durham applications are handled in a **Secure Payment Manager**, which ensures the secure management of your firm's credit card information.

The credit card payment method provides the following advantages:

- If you enter multiple credit cards into the **Secure Payment Manager**, you can assign different cards to each application.
- Receive automatic notification when your card's expiry date is approaching.
- Access reward programs offered by your credit card company.
- Reduce use of stationery, postage and courier costs.
- Decrease the time support staff spends on issuing cheques.

When displayed in the **Secure Payment Manager** window, your credit card number is partially masked and the expiry date for the credit card appears. Information for credit cards entered previously cannot be changed and credit cards cannot be deleted.



The screenshot shows the 'Secure Payment Manager' window. At the top is the Dye & Durham logo. Below it, the 'Account' section displays details for 'Summer Law CC Firm' with fields for CSIS Number, Account Name, Address, City, Province, Postal Code, Phone, Billing Contact Email, and Contact Name. A 'Credit Cards' section shows one card: Visa, Number 4242\*\*\*\*4242, Exp. Date 12/32. A 'Products' table lists products like Unity, THE CONVEYANCER, WILLBUILDER, ESTATE-A-BASE, and FASTCOMPANY, each with an assigned credit card and expiry date. A 'Status Message Definitions' section provides details on card statuses like 'Valid', 'Invalid', 'Not Assigned', and 'Product Not Enabled'. A 'Close' button is at the bottom right.

Type	Number	Exp. Date
Visa	4242****4242	12/32

Product	Credit Card	Exp. Date	Status
Unity	Visa 4242****4242	12/32	VALID
THE CONVEYANCER*	Visa 4242****4242	12/32	VALID
WILLBUILDER*	Visa 4242****4242	12/32	VALID
ESTATE-A-BASE*	Visa 4242****4242	12/32	VALID
FASTCOMPANY*			Not Assigned

The assigned credit card is debited when the user purchases credits in **Unity** or **The Conveyancer** or validates a record in **Fast Company**, **Estate-a-Base** or **Will Builder**.


## 2. SETTING UP THE PAYMENT METHOD

From the **Secure Payment Manager** window, your firm's Default user performs the following features:

- Updates your firm's contact information
- Enters one or more credit cards
- Assigns credit cards to the applicable product

## 2.1. ACCESSING THE SECURE PAYMENT MANAGER WINDOW

Access to the **Secure Payment Manager** window varies depending on the application:

- **Unity®**
  -  > Financial Administration > Set up Payment Info
- **The Conveyancer®, Fast Company®, Estate-a-Base® and Will Builder®**
  - **Configuration > Secure Payment Manager**

## 2.2. VIEWING AND CHANGING THE FIRM'S CONTACT INFORMATION

Your firm's Default user can view your firm's contact name, address, phone number and email account used for billing.

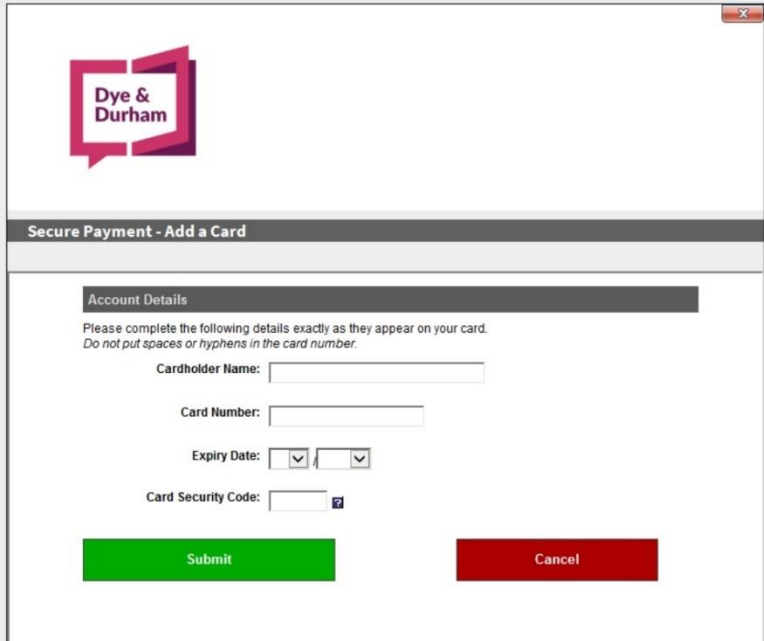
To change or update the billing information, click **Update Account Info Via email** in the **Account** section of the **Secure Payment Manager** window to open a new email message directed to **Dye & Durham** Customer Service Centre (CSC), with the subject line **Update of Dye & Durham Billing Information Requested**.

If you require further assistance with managing your credit card(s), please contact Customer Service at 1.866.367.7648 during business hours.

## 2.3. ADDING CREDIT CARDS TO THE FIRM'S ACCOUNT

Your firm's Administrator or Default user can enter one or multiple credit cards in the **Secure Payment Manager**.

- In the **Credit Cards** section of the **Secure Payment Manager** window, click **Add a Credit Card** to access the **Add a Card** popup.
- In the **Add a Card** popup, enter the information for the credit card and click **Submit** when you have finished. When the **Secure Payment Manager** window reappears, the credit card (with masking) and its expiry date are displayed.



**Notes:** There is no limitation on the number of credit cards that can be entered.

The system will not accept expired credit cards.

VISA® and MasterCard® are accepted by Dye & Durham. You do not need to specify which credit card you are using; the system detects the card from the number.

## 2.4. ASSIGNING CREDIT CARDS TO YOUR FIRM'S PRODUCTS

Your firm's Administrator or Default user assigns a credit card that has already been stored in the **Secure Payment Manager** to each **Dye & Durham** product used by the firm. The assignment of credit cards and products can be changed at any time.

- In the **Products** section of the **Secure Payment Manager** window, click **Edit** to access the **Assign Cards** popup.
- For each product, select one of your credit cards from the list. Note that only credit cards with valid expiry dates will be displayed in the list. Once you have finished assigning credit cards to the products, click **Submit**. When the **Secure Payment Manager** window reappears, the assignment is displayed.

Product	Credit Card
Unity	Visa 4242***4242 12/32
THE CONVEYANCER®	Visa 4242***4242 12/32
WILLBUILDER®	Visa 4242***4242 12/32
ESTATE-A-BASE®	Visa 4242***4242 12/32
FASTCOMPANY®	Select a Card

\*Product Not Enabled - This product is currently not enabled for this account. Please visit [inquiries@dyledurham.com](mailto:inquiries@dyledurham.com) to order the required products.

Submit Cancel

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In the **Secure Payment Manager** window, one of the following four statuses will appear for each product:

- **Valid** – The credit card has not expired and can be used with the associated product(s).
- **Invalid** – The credit card has expired or has been suspended and can't be used with the associated product(s).
- **Not Assigned** – A credit card has not been assigned to this product(s). Please select a card.
- **Product Not Enabled** – This product is currently not enabled for this account. Please visit [www.doprocess.com](http://www.doprocess.com) to order required products.