

How to Manage Stored Credit Cards

Within the portal, you can add one or more credit cards that will be saved on file. The advantage to storing a credit card is at checkout you don't have to go through the headaches of entering all the credit card and billing information. If you are set up for any type of recurring services, such as our Monthly Hosted service, you are required to have at least one valid credit card on file with us as a "default" credit card.

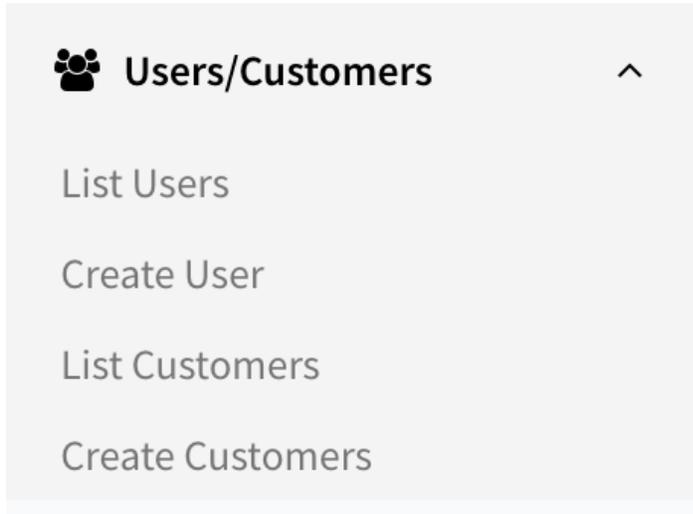
For security reasons, we do not actually store your credit card. All information is passed to the credit card gateway such as PayPal or Authorized.net, and they store all the information. They give us a unique token ID that we use each time we want to make a charge on your credit card.

Storing Credit Cards

You can save your credit card to your Portal account by using the process below. You will have the option to save a card when completing a transaction in the store. Instructions for purchasing items in the store can be found on this page: [How to Purchase Commercial Modules](#)

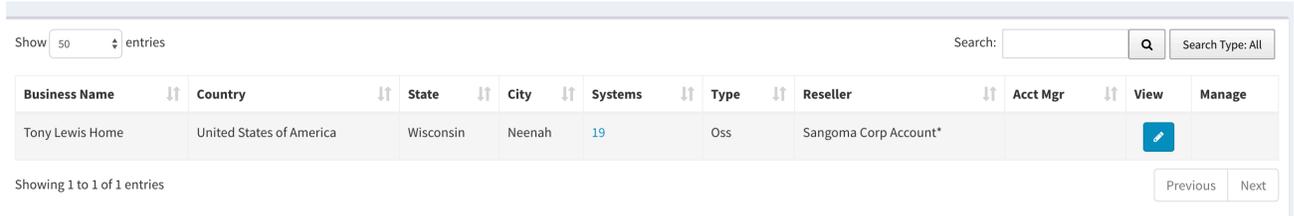
Accessing the Credit Card Section for Management

1. Log into the Sangoma Portal at <https://portal.sangoma.com>
2. Once logged into the portal, select **Customers List All**



3. You should now see a list of all customers, including yourself and any customers that are below you as sub account. You can only add and view credit card information for your own direct account for security reasons. None of your sub accounts will expose the credit card

option. Press the View button. 

A screenshot of a customer list table. At the top left, it says "Show 50 entries". At the top right, there is a search bar with a magnifying glass icon and "Search Type: All". The table has columns: Business Name, Country, State, City, Systems, Type, Reseller, Acct Mgr, View, and Manage. The first row shows "Tony Lewis Home", "United States of America", "Wisconsin", "Neenah", "19", "Oss", "Sangoma Corp Account*", and a blue pencil icon in the View column. At the bottom left, it says "Showing 1 to 1 of 1 entries". At the bottom right, there are "Previous" and "Next" buttons.

Business Name	Country	State	City	Systems	Type	Reseller	Acct Mgr	View	Manage
Tony Lewis Home	United States of America	Wisconsin	Neenah	19	Oss	Sangoma Corp Account*			

4. Click on the card tab at the top of the page when viewing or editing a customer. From here you can see a list of all credit cards you have on file. You can choose to delete a credit card, add a new card, and set which credit card is the default card to be used for recurring charges.

General Users Address Additional Deployments Cards

Credit Card Information

Add new credit card

Name on card	Type	Card number	Expiration Date
John (Default)	Visa	XXXX2222	05/2015

Adding a New Credit Card

1. Click the **Add new credit card** button.



2. If this is the first time adding a credit card, you will be prompted to enter the credit card information, including the billing address on file with the financial institution. Type in the information, including card number, name and expiration date. Note: the card type (Visa, Mastercard, etc.) will automatically appear as you enter your number. If the system detects an invalid credit card number, the number fields will be outlined in red and you will need to try again.

General Users Address Additional Deployments Cards

Credit Card Information



Save credit card

New address Billing address Shipping address

Address *

City *

State * Select

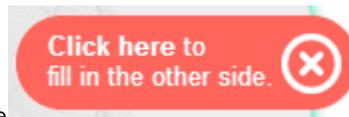
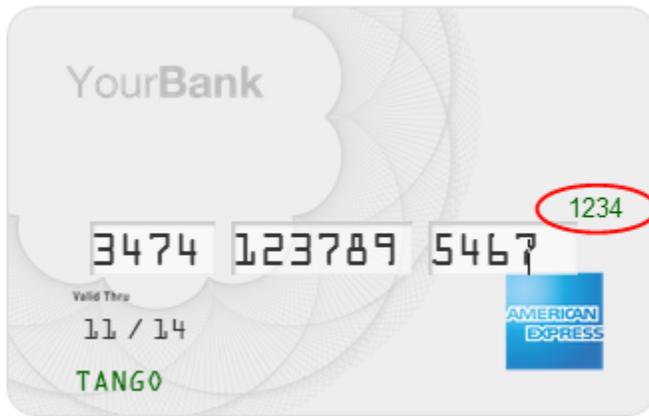
Zip *

Country * Select

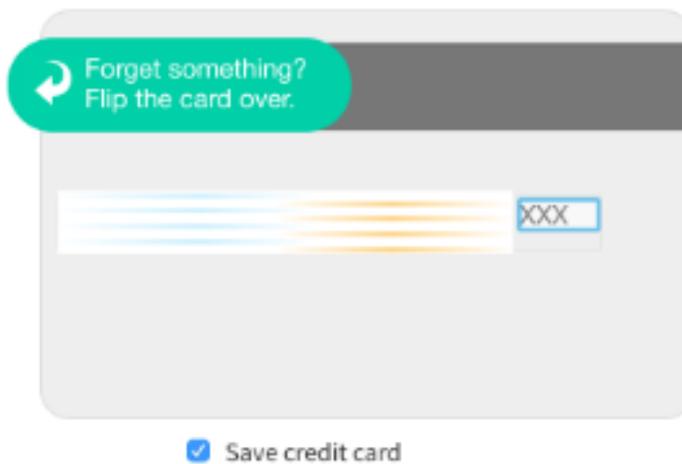
Back to credit card list Add credit card

3. Next, enter your card security code.

1. If paying by American Express, you will need to enter the four-digit code on the front of the card, as shown below.



2. For other types of cards, click the button to fill in the back side of the card. Then enter your three digit CVV code from the back of the card.



4. Enter in the Billing address associated with your credit card

New address Billing address Shipping address

Address *

City *

State *

Zip *

Country *

Save credit card

5. Once you have entered your credit card, click the box to save your credit card information for future



purchases with us. Then click the button.

Deleting A Credit Card

1. Navigate to the credit card list as described earlier in this wiki.

2. Click the **Remove** option to delete a card.



1. You can only remove your non default card. Default card is what is used for recurring billing service that you opt in for such as support contract or module renewals.

Name on card	Type	Card number	Expiration Date	
[Redacted] (Default)	Visa	XXXX2222	7/2019	
[Redacted]	Visa	XXXX2222	1/2018	Set as Default
G [Redacted]	Visa	XXXX2222	5/2018	Set as Default