TO OUR CLIENTS:

For security reasons, we request that you self-store your credit card information via our secure online pay page. No one will ever have access to your full credit card information.

**Please visit our web site at:**

**Mysite.com/pay**

By self-registering, you acknowledge acceptance of the terms of your engagement agreement and all payment processes.

For your convenience, payment arrangements for the initial engagement are noted below. Additional fees may apply, per the terms of the engagement letter, and they will automatically be applied to the card on file, unless you specifically request other arrangements.

Responding to this email with ‘confirmed’ will

|  |  |  |  |
| --- | --- | --- | --- |
| ITEM | DATE | AMOUNT | CLIENT INITIAL |
| Deposit |  |  |  |
| Payment 1 |  |  |  |
| Payment 2 |  |  |  |
| Payment 3 |  |  |  |

Credit card authorization template

REPEAT SALE CREDIT CARD CHARGE

AUTHORIZATION FORM

I (we) hereby authorize \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(MERCHANT NAME as it appears on your merchant account) to make repeat charges to my \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(Visa, MasterCard, Discover, Amex) credit card on file ending in \_\_\_\_\_\_\_\_\_\_\_(LAST 4 DIGITS), which is identified by the token below, and, if necessary, initiate adjustments for any transactions credited/debited in error. This authority shall remain in effect until MERCHANT NAME is notified by me (us) in writing to cancel it in such time as to afford MERCHANT NAME and Credit Card company a reasonable opportunity to act on it.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Customer Name Customer Business Email

Customer Statement Billing Address For Credit Card

Token Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Client ID: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Cardholder Signature Effective Date

I agree to pay the repeat sales amounts according to the cardholder agreement.

Please FAX return to:

Merchant Name

Merchant address

Merchant ph

Merchant email/fax

[www.mysite.com](http://www.mysite.com)

THIS SUPPLEMENTAL FORM MUST BE PRINTED ON CUSTOMER LETTERHEAD or letterhead containing the address of the cardholder.

REPEAT SALE CREDIT CARD CHARGE

AUTHORIZATION FORM SUPPLEMENT:

BILL TO AND SHIP TO ADDRESS ARE DIFFERENT

I (we) hereby authorize MERCHANT NAME to make repeat charges to my CARD BRAND credit card on file ending in LAST 4 DIGITS, for goods and services that will be shipped to addresses other than the cardholder billing address. and, if necessary, initiate adjustments for any transactions credited/debited in error. This authority shall remain in effect until MERCHANT NAME is notified by me (us) in writing to cancel it in such time as to afford MERCHANT NAME and Credit Card company a reasonable opportunity to act on it.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Customer Name Customer Email

Customer Billing Address For Credit Card

Ship to address: (MODIFY AS NEEDED)

\_\_\_\_Enter name, company, mail address

\_\_\_\_Any address in the USA

\_\_\_\_Any address on a Purchase Order, including electronically delivered PO’s without a signature.

\_\_\_\_Any email request from [users@customerdomain.com](mailto:users@customerdomain.com)

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Cardholder Signature Effective Date

I agree to pay the repeat sales amount according to the cardholder agreement.

Please return to:

Merchant Name

Merchant address

Merchant ph

Merchant email/fax

BACKGROUND: Most merchants have printable authorization forms that don’t comply with the basic requirements to protect against disputes or don’t comply with Payment Card Industry Data Security Standards (PCI Compliance) guidelines.

FOR MERCHANTS THAT NEED TO STORE CARD DATA: Most merchant forms include space for the CVV, CVC, CV2 security code. Merchants should NEVER store the CVV code. Once a transaction has been approved with the CVV or if the merchant performs a zero dollar authorization to validate the CVV, it is never needed again. CVV is a fraud tool only, and does not impact fees.

FOR MERCHANTS THAT DO NOT NEED TO STORE CARD DATA:

A more secure solution may be to enable your customer to pay via a secure online form. This prevents exposing any sensitive payment information to employees and electronic storage devices, including efax, and recorded phone calls.

* For added security, upon completion of payment, require the customer to respond via a company email address that they have received the payment. ( Check that email name and cardholder name match; if they don’t get the cardholder to acknowledge receipt. )
* For maximum security, email the receipt to the cardholder for signature. The bill to and ship to address must match, otherwise authorization in writing is needed.
* For one-time sales, a valid signed receipt, not faxed authorization, is most critical.

Form Instructions: replace the information in UPPER CASE.

USE AND DISTRIBUTION

This form contains language suitable for businesses where all of these elements apply:

* business to business
* card not present – phone, fax, email, or other order (not ecommerce)
* repeat customers with sales of variable amounts; need to bill customers on an occasional or regular basis for varying purchases
* sensitive card data is stored via a PCI compliant solution that replaces card data with a ‘token’ ; the token is linked used to charge the card

The author makes no warranties; use at your own risk.

Refer to the Visa International Operating Regulations and Chargeback Management Guidelines for current information specific to your situation.

Comments? Fill in the contact form at <http://3dmerchant.com>.

Do you want to empower your customers to pay 24/7 via a secure pay online page?

Would you like to reduce scope for PCI Compliance?

Would you to eliminate fax authorization forms that expose card data?

Contact Christine Speedy at 954-942-0483