

Release Notes

Adding Option to "Save Card on File" from Enrollment Wizard

General Overview

Currently, the Enrollment Wizard shopping cart does not include an option to save the credit card being used to the family account.

The purpose of this task is to add a checkbox option to "Save Card on File" on the Enrollment Wizard shopping cart screen. If enabled, the system will save the payment details to the family record upon successful payment.

However, due to card brand requirements, this will not automatically enable the "This payment method is authorized for recurring billing" option.

To authorize the payment method for recurring billing, either:

- A staff member will need to enable "This payment method is authorized for recurring billing" in the family's details (if given permission to do so by the Primary Guardian on the account).
- The Primary Guardian will need to enable this option in their MY ACCOUNT screen in the Customer Portal.

How will this benefit me?

By adding an option to "Save Card on File" on the Enrollment Wizard shopping cart screen, removes the need to go into the family record and enter the payment details again in order to save them to the family profile.

Where will I see these changes?

These changes will affect the Enrollment Wizard in the Office Portal.

What is being changed/added?

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How does this work with existing settings?

This update adds a new option to the existing Enrollment Wizard shopping cart screen.