# Updating E-Commerce themes for tokenized payments<sup>®</sup>

This article applies to:

Pro Max Ultimate

Keap is updating how it securely stores credit card information, called tokenization. This will be rolled out to all payment processors integrated with Keap. If you are processing tokenized payments, you will need to review the themes that are active on your Order Forms and Shopping Cart themes. Themes created before April 2023 will not work with tokenized payment methods and a new one will need to be created. You will need to create a new theme and then activate it on your existing order forms.

\*Note: Currently tokenized payments are only applicable if you have an active Keap Pay account. As updates roll out, other integrated merchant accounts will also be transitioned to tokenized payment methods. Please see the Help Center article linked here for more information.\*

- 1. Finding themes that need to be updated
- 2. Updating your Order Form themes
- 3. Updating your Shopping Cart Theme

### Finding themes that need to be updated

Order form and Shopping Cart themes do not have a timestamp of their creation date. To solve this, we've made an update where if an order form or shopping cart theme needs to be updated the payment fields are not visible. This is to reduce the amount of failed payments and to give additional clarity on which themes to update. See below for additional instructions.

### Checking Order Form Themes

1. Navigate to the Sales Page then select E-Commerce Setup



2. Under Sell online, select Order Forms

	Manage all of your product related settings	Bundle and sell products in your campaigns, or on your website	Encourage your customers to buy with custom promo codes
	Add many products at once with your product import tool	Learn about Product Bundle Links	Learn about Promotions 🗗
	Learn about Products 🕑		
	Sell online		
	Order Forms     Organize all your products and     services in one place	View Shopping Cart         >           Link to your online shopping         >           cart page         >	Design a checkout web page to sell your products or services
	↔ Order Form themes Pick from existing themes or create your own custom theme	Copy Shopping Cart URL Link to your online shopping cart page	Learn about Checkout Pages 🖉
	Learn about Order Forms 🕑	Shopping Cart settings Manage your cart checkout, taxes, and notification settings	
•	Payment Plans     Allow an online purchase to be     split into multiple payments	♦ Shopping Cart themes Pick from existing themes or create your own custom theme	
	Learn about Payment Plans 🕑	Learn about Shopping Cart 🛃	

3. Click on the themes column to sort quickly by themes

Main Search		Search			Create New
31 <sub>results</sub>					Actions ~ 50 ~ per page
□ ~	Id	Formname	Products	Theme	Preview
	154	\$0	1	AD Test Theme	Preview
	107	2К	1	MB SE	Preview
	105	зк	1	MB SE	Preview
	103	4К	1	MB SE	Preview
	79	ACH TEST 3	1	MB SE	Preview
	117	Amazing Product	1	MB SE	Preview
	99	High SE Form	1	MB SE	Preview
	101	High V SE	1	MB SE	Preview
	123	June 13 test	1	MB SE	Preview
	125	June 13.2	1	MB SE	Preview
	158	Keap Pay MB Test	1	Keap Pay MB	Preview
	156	Keap Pay Test 1	1	MB SE	Preview

4. Click on the preview button next to every order form with a unique theme

Main Search		Search			Create New
31 results					Actions ~ 50 ~ per page
□ ~	Id	Formname	Products	Theme 🕹	Preview
	97	SE Recurring	1	Stripe El	Preview
	91	SE Final Non Mobile	t	Stripe El	Preview
	81	Non mobile SE	t	Stripe El	Preview
	127	Work ACH	1	MB SE	Preview
	111	Tax Beta	t	MB SE	Preview
	145	Stripe Subscription (add Free Trial)	0	MB SE	Preview
	139	Spark Wellness Book Series	t	MB SE	Preview
	95	SE Mobile Recurring	t	MB SE	Preview
	93	SE Final Mobile	t	MB SE	Preview
	73	PD ACH Subscription	2	MB SE	Preview
	71	PD ACH Order Form	1	MB SE	Preview

5. Check if the payment fields are missing, if they are, new themes need to be created to replace them.

Zero Test	1 x \$0.00 \$0.00	* First Name	* Last Name
	1		
		* Address - Line 1	Address - Line 2
Subtotal	\$0.00	_ * City	State*
Order total	\$0.00		
Have a promo code?		* Country United States	✓ × Zip Code
You might also be interested in:		- * Phone Number	
A Little Extra Product	<del>\$20.00</del> <b>\$20.00</b>		
	Add to order	- * Email Address	
		Credit card	
		O PayPal	
		Pla	ce Order
		Custo	m Tees

### Checking Shopping Cart Themes

1. Navigate to the Sales Page then select E-Commerce Setup

k ← Search Home Contacts	اد Sales Opportunities Orders Subscriptions Order forms Ecommerce setup	E-C ्रिः Add	Commerce Search E-Commerce		
E My day ©	Products and services	\$	Products > Organize all your products and services in one place	i≡	Prod Manag and k
Sales	Settings Payment dashboard Deposit dashboard	٥	Product settings > Manage all of your product related settings	8	Prod Bund camp
Marketing 47 Automation		ىك	Add many products at once with your product import tool		Learn
i    Reports	•		Learn about Products 🕑		
		Sell	online		
		E	Order Forms > Organize all your products and services in one place	å	View Link t cart p
0		$\diamond$	Order Form themes > Pick from existing themes or create your own custom theme	G	Copy Link t cart p
L			Learn about Order Forms 🗗	٥	Shop Manai taxes

2. Under Sell Online, Click on "View Shopping Cart"



3. Select any of the products that's linked



4. Click the "add to cart" button



5. Once the product is added to your cart, click "Checkout"

Shopping Cart	Continue Shopping
Name	Price Qty Total
A Little Extra Product Remove	\$20.00 1 \$20.00 Update
Sub Total:	\$20.00
Payment Plans	
Single payment of	\$20.00
O 2 payments of (Finance Charge \$0.20)	\$9.09 (initial charge of \$2.02)
	Enter a Promo Gode: Apply Continue Shopping Checkout
	PayRed  PayLater  Debit or Credit Card
	Powered by <b>PayPai</b>
	Terms and Conditions

6. Check the payment details and if the payment fields are missing, if they are, the shopping cart theme needs to be updated.

Credit card     PayPal
Place Order

*For more information on how to create a new Order Form theme, please visit the Help Center Article linked here.* 

\*Important Note: Making a new theme active on an Order Form will remove the HTML content in the HTML Areas tab. We strongly recommend copying any code you have entered into the HTML area to a safe place. Once you've updated the Order Form theme you can then paste back in the HTML content.\*

### Updating your Order Form themes

**1.** Navigate back to the Ecommerce Settings page and click Order Forms



2. Click into the order forms with the older themes

k + ⊄ Search Gree	le Sales Orportunities Orders Subscriptions	Order Main Search	Form	S + Back to E-Commerce Setup		Actions ~	Create N
Contacts	Ecommerce setup	□ ~	ld	Formname	Products	Theme	Preview
Hy day	Products and services		154	50	1	New theme for 2024	Preview
\$∕ Sales	Related shortcuts		107	2К	1	MB SE	Preview
لم Marketing	Payment dashboard		105	зк	1	MB SE	Preview
47 Automation			103	4К	1	MB SE	Preview
r]] Reports			79	ACH TEST 3	1	MB SE	Preview
			117	Amazing Product	1	MB SE	Preview

#### 3. Once in the Order Form go to the Theme tab.



### 4. Locate the theme you created near the bottom of this page and click "Make Active"

لي Sales کي Marketing کي Automation ال Reports	Related shortcuts Settings Payment dishboard Deposit dishboard	Ement Test 2		Eternetis Test 3	Make Active	Mi SE	Make Active
Ø ©		Stype E	Make Active	Keep Pay MB	Make Active	New theme for 2_	Make Active

**5.** A pop up informs you that changes to the HTML area will be lost. Click OK when ready to proceed.



6. You will now see that new theme under the "Default Theme" heading.



# Helpful hack for updating multiple order forms at the same time

Keap users that have multiple order forms connected to the same theme can save time when updating the theme by following these steps. Disclaimer: the following steps will still remove custom HTML content from the order forms that get updated.

- 1. Create the new theme that will be used on the order forms.
- 2. Set the new theme as the default by clicking on the "Use Theme" link.
- 3. Delete the old theme within your Keap application

When a theme is deleted, the Order Forms connected to that theme will then be connected to the default theme in the app.

NOTE: Making a new shopping cart theme active will remove the HTML content in the HTML areas tab. We strongly recommend copying any code you have entered into the HTML areas and saving them in a safe place for later. Once you've updated the Shopping Cart theme you can then add back in the custom HTML content.

### Updating your Shopping Cart Theme

1. Go to your Ecommerce setup

Search	Orders	
6 Home	Subscriptions	
စ	Order forms	٩
Contacts	Ecommerce setup	
Hy day	Products and services	
\$,/	Related shortcuts	Criteria
Sales	Settings	Date Range equals: all
ل Marketing	Payment dashboard	Actions ~ New Search Edit Criteria/Ct
4 Automation	Deposit dashboard	1 results
ı    Reports		Opportunity Baymonte Test Opp

### 2. Click into Shopping Cart Themes



#### 3. Click Create a New Theme



4. Select the type of theme you want and click "Use this theme." Choose any theme that is available.

k Q Search Home Contacts	© One Column 1-10 products	O Two Column 10-50 Products				
My day	Choose a Theme					
ی Sales Matheting Automation	Custom Tees 15% OFF EVERYTH Term	VT VT VT VT VT VT VT VT VT VT	Custom Tees I man and the second sec	The second secon	Custom Tees 15% OFF EVERYTH Term	The second
Reports	Basic Grey	Use this theme	Basic Blue	Use this theme	Basic Belge	Use this theme
Ø	Photo Experts GET 25% OFF ALL CAMERAS Graphite				The second secon	erent de la construcción de la c
				By Fusetastic		

5. Choose a name for your custom theme and click Save



6. Customize your theme and add any custom HTML content you may have

k Q Search Home	Keap Pay 2024 «Back to Shopping Carl Themes Images HTML Areas Labels Edit CSS Settings Common Areas	
©ì; Contacts ∰ My day	Custom Tees	
Sales Arketing 47 utomation		Delete Edit

7. Once you're finished customizing the theme, click "Back to Shopping Cart Themes"

Tester shopp	g Cart Themes	
Images HTML Areas L	bels Edit CSS Settings	
Company Logo Top Banner	Custom Tees	
		Delote
	1.0 2006/02+1220/02102	

8. Find the theme you just created and click "Use Theme" to make it active

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15% OFF EVERYTHING	
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Inactive Themes	Color Inc.
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Inactive Themes	
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# Update your Spiffy theme to accept Tokenized payments.

If you use Spiffy to change the appearance of your Order Forms or Shopping Cart theme in Keap, you will need to take action to enable tokenized payments to

operate through your forms.

- When you update your Order Form theme do not choose the Mobile Responsive layout as that will break the Spiffy code.
- 2. You will then need to re-publish your Spiffy Order Form.
- 3. After re-publishing those forms the Updated Payment fields will load.

If you are having an issue, please reach out tosupport@gospiffy.com and they will be happy to assist further.