

Manage Payment Methods

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ADD NEW PAYMENT METHOD

1. Find or add member
2. Click "Payment Methods"
3. Click "Add Card" or "Add Bank Account" > Enter Account Information
4. Review payment disclosure on screen with member > Click check box
5. Click "Save"

TRANSFER MULTIPLE ACTIVITIES TO A DIFFERENT PAYMENT METHOD

1. Find member
2. Click "Payment Methods"
3. Add new payment method
4. Review current pending payments by clicking "Pending Payments" on the old payment method > Click "Close"
5. Click "Transfer" on the old payment method
6. Check payments that should be moved to new method (does not need to be all payments unless payment method is expiring or being deleted)
7. Set the "to" payment method to be the new method already added
8. Click "Save"
9. Once all pending payments have been moved, you can delete the old billing method if needed.

TRANSFER ONE ACTIVITY TO A DIFFERENT PAYMENT METHOD

1. Find member
2. Click "Activities"
3. Click on the row of the activity
4. Click "Recurring Billing" or "Payment Plan" (if neither link is available, the activity has no billing records)
5. Select new payment method from drop down list
6. Click "Save"

EDIT PAYMENT METHOD

1. Find member
2. Click "Payment Methods"
3. Click "Edit"
4. Make changes
5. Click "Save"

DELETE PAYMENT METHOD

A payment method cannot be deleted if it is attached to an activity with payment plan records or future recurring billing. Transfer the activity to another payment method first, then delete.

1. Find member
 2. Click "Payment Methods"
 3. Click "Delete"
 4. Click "Yes" on the confirmation message
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