

Manage Payment Methods

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[Find Member](#) > [Payment Methods](#)

Add New Payment Method

1. Find or add a member.
 2. Click **Payment Methods**.
 3. Click **Add Card** or **Add Bank Account** and enter the Account Information.
 4. Review payment disclosure on the screen with the member and click the check box.
 5. Click **Save**.
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Transfer Multiple Activities to a Different Payment Method

1. Find member.
 2. Click **Payment Methods**
 3. Add a new payment method.
 4. Review current pending payments by clicking **Pending Payments** using the old payment method and clicking **Close**.
 5. Click **Transfer** on the old payment method.
 6. Check payments that should be moved to a new method (all payments do not need to be made unless the payment method expires or is 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.
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Transfer One Activity to a Different Payment Method

1. Find a 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 a new payment method from the drop-down list.
 6. Click **Save**.
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Edit Payment Method

1. Find member.
 2. Click **Payment Methods**.
 3. Click **Edit**.
 4. Make changes.
 5. Click **Save**.
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Delete Payment Method

A payment method cannot be deleted if associated with an activity with payment plan records or future recurring billing. First, transfer the activity to another payment method.

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