

F122: Adding/Changing a Payment Method

Covers how to add or change a payment method on a member's record.

You will start by going to the member's record:

The screenshot shows a member record for Jeffrey Allen. The 'General' tab is selected, and the 'Billing' tab is highlighted with a red box. The member's details are as follows:

- Member Information:** Jeffrey Allen, Nickname: -, Phone: 222-333-4444, Birthday: 6/1/1901, Group: -, Insurance Company: PreferredOne
- Bar Code:** 4654833
- Source:** -
- Gender:** Male
- Member since:** 1/16/2015
- Last Visited:** -
- Contract End Date:** Auto Renew
- Agreement ID:** 20481021
- Membership Plan:** Single - Reciprocal
- Membership Category:** Reciprocal
- Number of Members:** 1
- Is Primary:** Yes
- Billing Type:** Recurring
- Current Status:** OK

Agreement Details
NOTE: Terminated/Transferred membership agreements can not be edited. ■ = Void Agreement(s)

Agreement Name	Agreement Category Name	Billing Type	Start Date	End Date	Edit	Cancel	Actions
Single - Reciprocal	Reciprocal	Recurring	3/12/2015	-			
Joint - Reciprocal	Reciprocal	Recurring	1/16/2015	3/12/2015	View		

You will then select the 'Billing' tab, which is the fourth tab across the top of the member record:

The screenshot shows the same member record for Jeffrey Allen, but with the 'Billing' tab selected and highlighted with a red box. The member's details are as follows:

- Member Information:** Jeffrey Allen, Nickname: -, Phone: 222-333-4444, Birthday: 6/1/1901, Group: -, Insurance Company: PreferredOne
- Billing ID:** 4654833
- Source:** -
- Gender:** Male
- Member since:** 1/16/2015
- Last Visited:** -
- Contract End Date:** Auto Renew
- Agreement ID:** 20481021
- Membership Plan:** Single - Reciprocal
- Membership Category:** Reciprocal
- Number of Members:** 1
- Is Primary:** Yes
- Billing Type:** Recurring
- Current Status:** OK

Agreement Details
NOTE: Terminated/Transferred membership agreements can not be edited. ■ = Void Agreement(s)

Agreement Name	Agreement Category Name	Billing Type	Start Date	End Date	Edit	Cancel	Actions
Single - Reciprocal	Reciprocal	Recurring	3/12/2015	-			
Joint - Reciprocal	Reciprocal	Recurring	1/16/2015	3/12/2015	View		

This brings you to the billing page. You will then select the 'Payment Methods' tab which is the sixth tab in the middle of the page:

Jeffrey Allen
 Nickname : -
 Phone: 222-333-4444
 Birthday: 6/1/1901
 Group : -
 Insurance Company : PreferredOne

Bar Code : 4654833
 Source : -
 Gender : Male
 Member since: 1/16/2015
 Last Visited : -
 Contract End Date: Auto Renew

Agreement ID : 20481021
 Membership Plan : Single - Reciprocal
 Membership Category : Reciprocal
 Number of Members : 1
 Is Primary : Yes
 Billing Type : Recurring
 Current Status : [OK](#)

Current Due: \$0.00
 Future Due: \$0.00
 Unapplied Amount : \$0.00
 Total: \$0.00

Next Dues Post Date: 3/1/2016
 Last Billing Date: 2/1/2016
 Membership Price : \$48.04
 Wellness Account Balance : \$0.00

Payment History Invoice History Current Due Future Due Customer Account **Payment Methods** Statement

- Void Payment Account Adjustment

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Your next step is to select the 'Add Payment Method' button:

Jeffrey Allen
 Nickname : -
 Phone: 222-333-4444
 Birthday: 6/1/1901
 Group : -
 Insurance Company : PreferredOne

Bar Code : 4654833
 Source : -
 Gender : Male
 Member since: 1/16/2015
 Last Visited : -
 Contract End Date: Auto Renew

Agreement ID : 20481021
 Membership Plan : Single - Reciprocal
 Membership Category : Reciprocal
 Number of Members : 1
 Is Primary : Yes
 Billing Type : Recurring
 Current Status : [OK](#)

Current Due: \$0.00
 Future Due: \$0.00
 Unapplied Amount : \$0.00
 Total: \$0.00

Next Dues Post Date: 3/1/2016
 Last Billing Date: 2/1/2016
 Membership Price : \$48.04
 Wellness Account Balance : \$0.00

Payment History Invoice History Current Due Future Due Customer Account **Payment Methods** Statement

Add Payment Method Account Adjustment

Primary	Account Name	Account Number	Exp. Date	Update Date	Payment Method	Reference #	Registration Status	Delete	Edit
<input checked="" type="radio"/>	jeffrey allen	*****9330	7/2018	7/13/2015	Credit Card	4462569	PENDING-SUBMISSION		Edit
<input type="radio"/>	Jeffrey Allen		-	3/12/2015	Statement	4006905	PENDING-SUBMISSION		Edit

Now select the payment method, Checking Account, Credit Card or Savings Account.

Add Payment Method

Payment Type:

First Name:

Account Number:

Once selected, fill out the required fields and click on the submit button.

Add Payment Method

Please enter full name.
Please enter a valid account number.
Please enter a valid routing number.
Please enter a valid bank name.

Payment Type:

First Name:

Account Number:

Routing Number:

Bank Info

Bank Name:

Street 1:

Street 2:

Add Payment Method

Please enter full name.
Please enter a valid card number or supported card.
Please enter a valid expiration date.

Payment Type:

First Name:

Account Number:

Expiration:

Supported Cards:

Once you save the new payment method information, you will see it populated when selecting the 'Payment Methods' tab: **Please note:** adding a payment method does not automatically update it to the primary form of payment. You will need to manually click on the bubble to select it as the primary form of payment

The screenshot displays a user profile for Jeffrey Allen. The 'Billing' tab is active, showing membership details and financial information. Below this, a table of payment methods is visible, with the first method selected as the primary one.

Primary	Account Name	Account Number	Exp. Date	Update Date	Payment Method	Reference #	Registration Status	Delete	Edit
<input checked="" type="radio"/>	jeffrey allen	*****9330	7/2018	7/13/2015	Credit Card	4462569	PENDING-SUBMISSION		Edit
<input type="radio"/>	Jeffrey Allen		-/-	3/12/2015	Statement	4006905	PENDING-SUBMISSION		Edit