

**Adding & Updating Payment Information in DonorView**

Go to the Payment Options tab on the constituent record. This will show all saved payment methods and allow you to add or delete payment methods.



To delete a payment method, click on the trash can icon for that payment method.



To add a payment method, click on either Add credit card or Add bank account.



For a credit card payment, the entry screen looks like this. Fill out the information & hit Save. If you want to update the address & have it go to the constituent profile, be sure to select Yes for the option “Use this address to update the profile?”.



For a bank account/ACH payment, the screen looks like this. Fill out the information & hit Save. If you want to update the address & have it go to the constituent profile, be sure to select Yes for the option “Use this address to update the profile?”.

