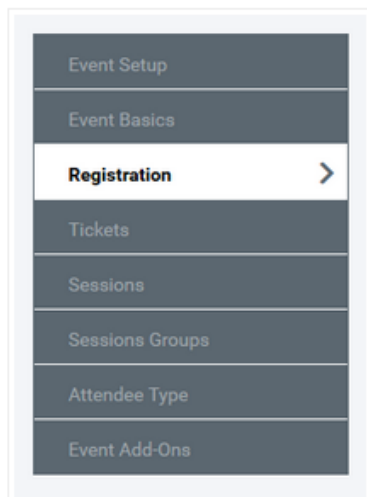


Before switching to another payment processor ensure all unpaid invoices are processed

Before changing any currently configured payment process account is it important to first ensure all invoices associated with a specific payment processor account do not have an outstanding balance which remains to be collected using a real-time transaction (Credit Card or ACH).

Current event-related invoices linked to a specific payment processor will not be updated to reflect to new payment processor account. If you disable the payment processor that is currently linked to an invoice you will be unable to process any real-time transactions for the invoice.

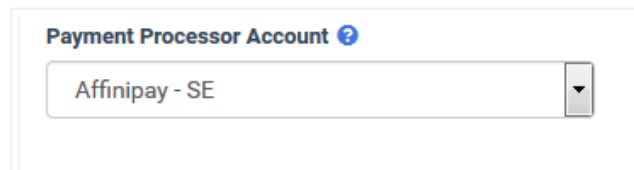
How do I know if this applies to me?



This step applies to you if any of your current or upcoming Events have a defined payment processor **and** there are invoices for these events with an outstanding balance in need of collecting.

To verify if the Event has a defined payment processor:

1. Edit your events and navigate to the *Registration* step.
2. Locate the field *Payment Process Account*.



After confirming you have at least one event with a specific payment processor navigate to:

Ecommerce > Store Order Processing.

Set the following filters to return invoices linked to a specific event with an outstanding balance.

Status:

- Any Status
- Open
- Processed
- Shipped/Closed
- Pending

Has Outstanding Balance:

Yes

Select an event and click the **Select Event** button.

Event:

- Show transactions for all events
- [Pick an Event](#)
- Doesn't matter

Filter By Event [X]

Date: Upcoming

Status: Doesn't matter

Category: Any Category

Select an event:

- Region 4 Meeting
- Region 12 Meeting
- Region 16 Meeting
- Region 1 Meeting
- Region 11 Meeting
- Region 6 Meeting
- Region 7 Meeting
- Region 15 Meeting
- Region 8 Meeting

The list of invoices returned will need to be processed before you change the currently specific payment processor.

Once all invoices are processed (meaning the balance is 0.00 and no further charges are anticipated) the payment processor can safely be disabled as you plan to create a new payment processor account. If you change the specific payment processor for the event all invoices created after this change will now be linked to the newly specified payment processor.

What if my event will be complete in the next few months?

Work with your current payment processor merchant and agree on a date to which your current account(s) can remain active. If you foresee having all invoices at a zero balance in the near future the merchant may be able to work with you so you can avoid having to halt event registration, process all outstanding invoices, change processors, and then re-open event registration.

NOTE: If you update the event to use the newly specific payment process and you allow event registration editing the invoice may currently be paid in full but the registrant may modify their registration resulting in an outstanding balance. If this occurs you will need to collect payment for the new balance via a check or cash payment.

I have created my new payment processor account in YM. What is my next step?

You must edit each event and update the payment processor to your new payment account for all of your events that require a specific payment processor.

The screenshot shows a sidebar menu on the left with the following items: Event Setup, Event Basics, **Registration** (highlighted with a right-pointing arrow), Tickets, Sessions, Sessions Groups, Attendee Type, and Event Add-Ons. To the right of the sidebar, there is a text instruction: "You must update each event and set the Payment Processor Account to your new account." Below this instruction is a dropdown menu labeled "Payment Processor Account" with a help icon. The dropdown menu is currently set to "ChargeIO - SE".

Can I use the Store Payment Options processor for Events?

If you only have one payment account or you want use the Store Payment Options processor you can update the payment processor for the event to the default setting. This is also the default behavior for any new events that are created.

The screenshot shows the "Payment Processor Accounts" tab selected within the "Commerce Options" section. Under the heading "Store Payment Options", there is a dropdown menu set to "ChargeIO - SE". Below the dropdown, it says "Configured for real-time payment processing via **ChargeIO (Affinipay)**."

For existing events with a specific payment processor you can set the value to [Current Default Processor] as shown below. You do NOT need to set the payment processor if your event will use the same payment processor as the **Store Payment Options** within *Commerce Configuration > Commerce Options*.

The screenshot shows a dropdown menu labeled "Payment Processor Account" with a help icon. The dropdown menu is currently set to "[Current Default Processor]".

In the example above all store order invoices for the event will use the *ChargeIO - SE* payment account at checkout.