How to Bulk Charge a Member

Actions · https://a2bmanager.com/docs/how-to-bulk-charge-a-member/

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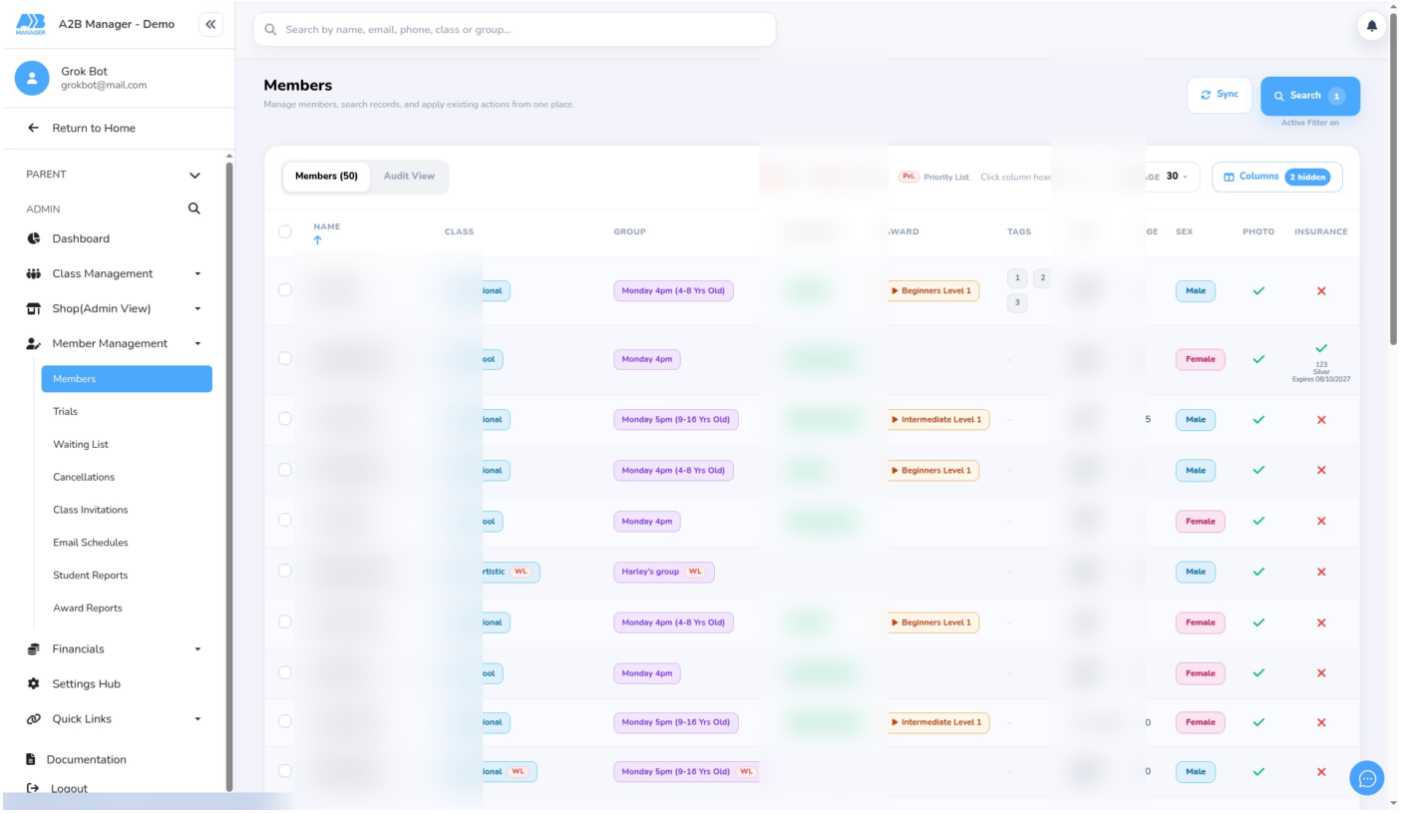
Video walkthrough: charging one member's saved card with Bulk Charge

Bulk Charge takes a one-off payment from the saved card of one or more members in one go, for example for kit, a competition entry or term fees. The card is charged as soon as you click Charge. If a card payment doesn't go through, an invoice is emailed to the parent instead.

Charging a member

Step 1: Open Members (0:00)

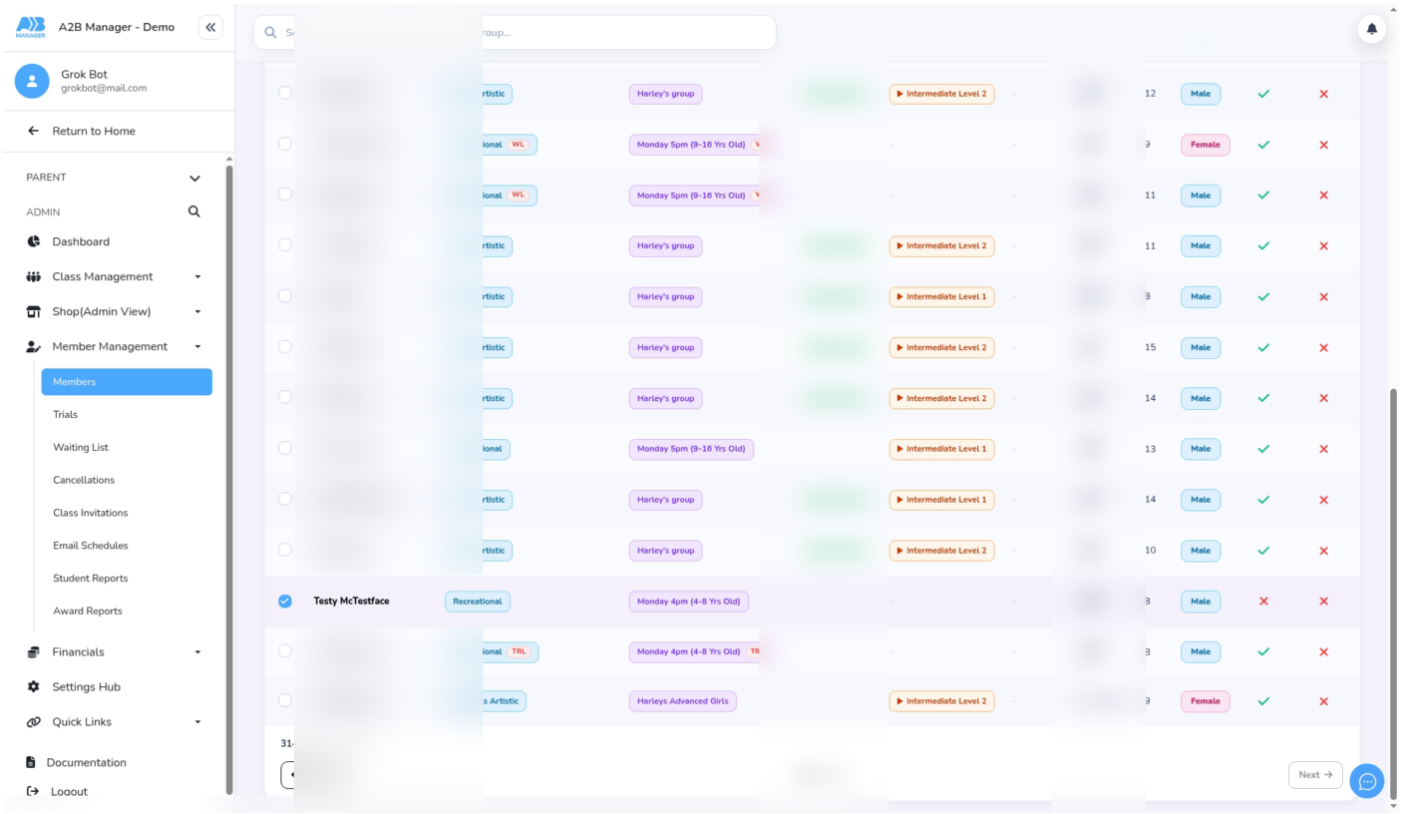
- In the left-hand menu, open **Member Management** and click **Members**.
- To find someone quickly, click **Search** on the Members page and search by name, or page through the list. The search bar at the very top of the screen only suggests names; it doesn't filter the list.
- You can also bulk charge from a class's member list, Trials, Waiting List and Cancellations.



Step 1: The Members list

Step 2: Select the member (0:15)

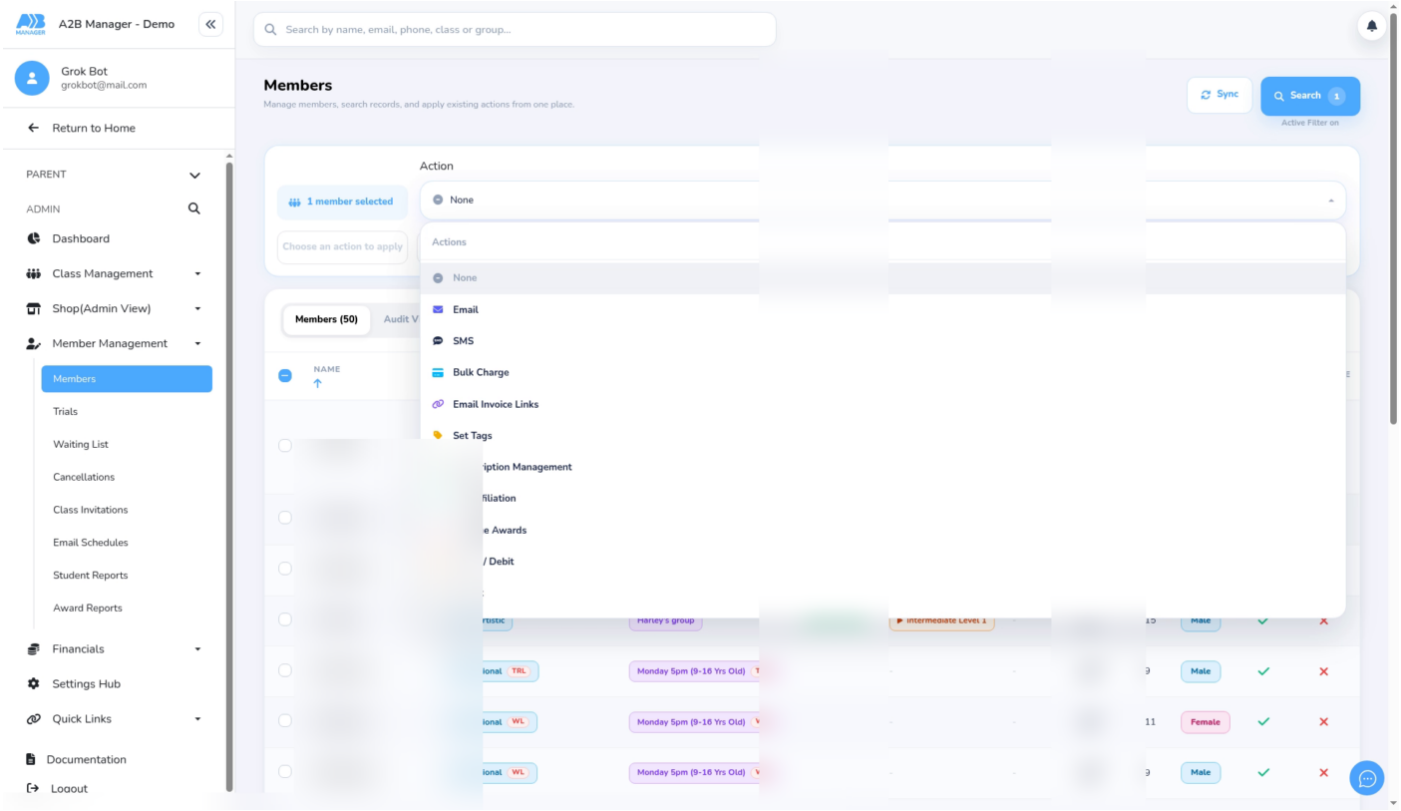
- Tick the round box at the start of the member's row. Tick more rows to charge several members at once.
- Take care with the tick box in the header: it selects everyone shown on the page.



Step 2: Testy McTestface ticked

Step 3: Choose Bulk Charge (0:24)

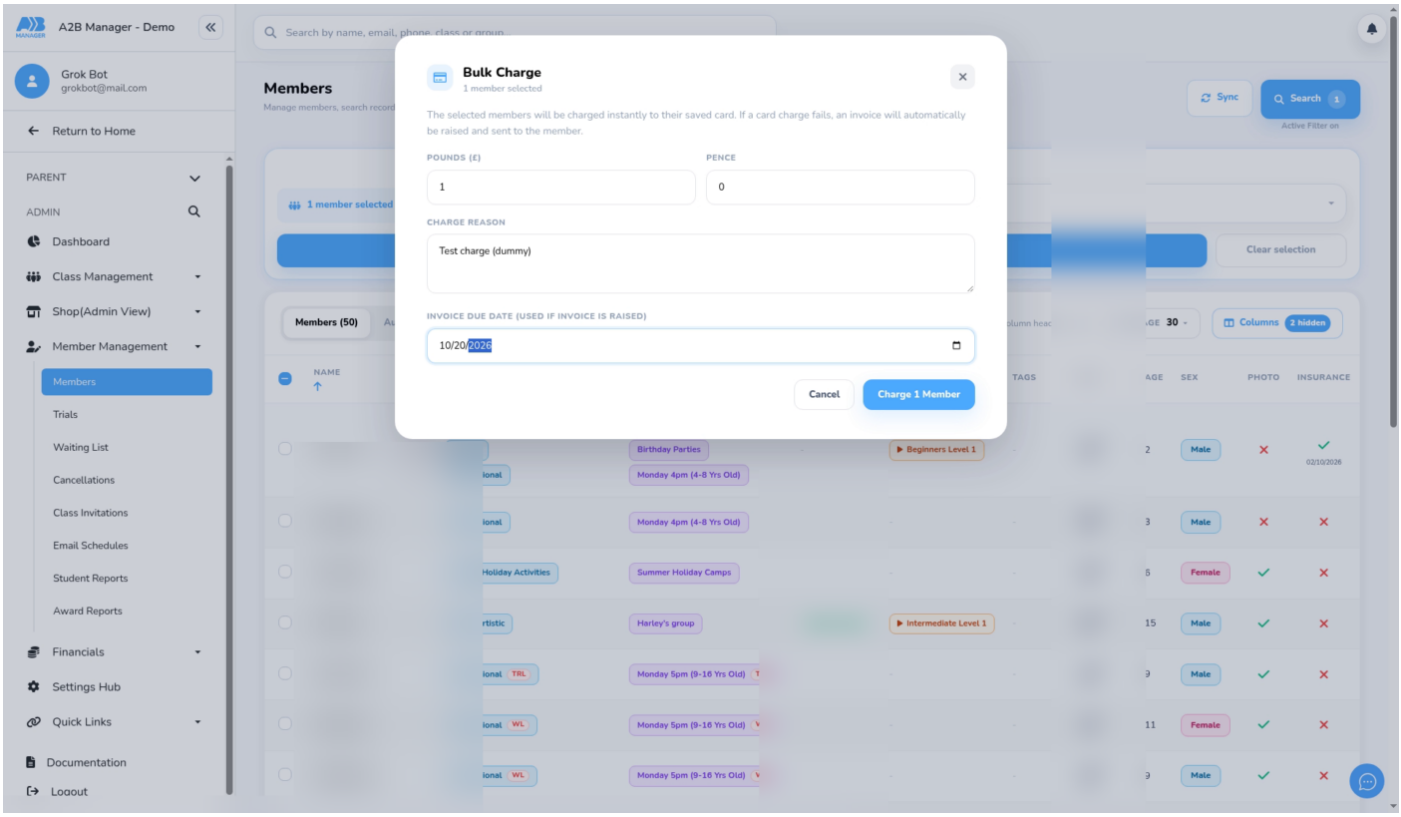
- At the top of the page, check it says the right number of members selected (here, **1 member selected**).
- Open the **Action** menu and choose **Bulk Charge**. The Bulk Charge window opens straight away.



Step 3: The Action menu

Step 4: Enter the charge details (0:42)

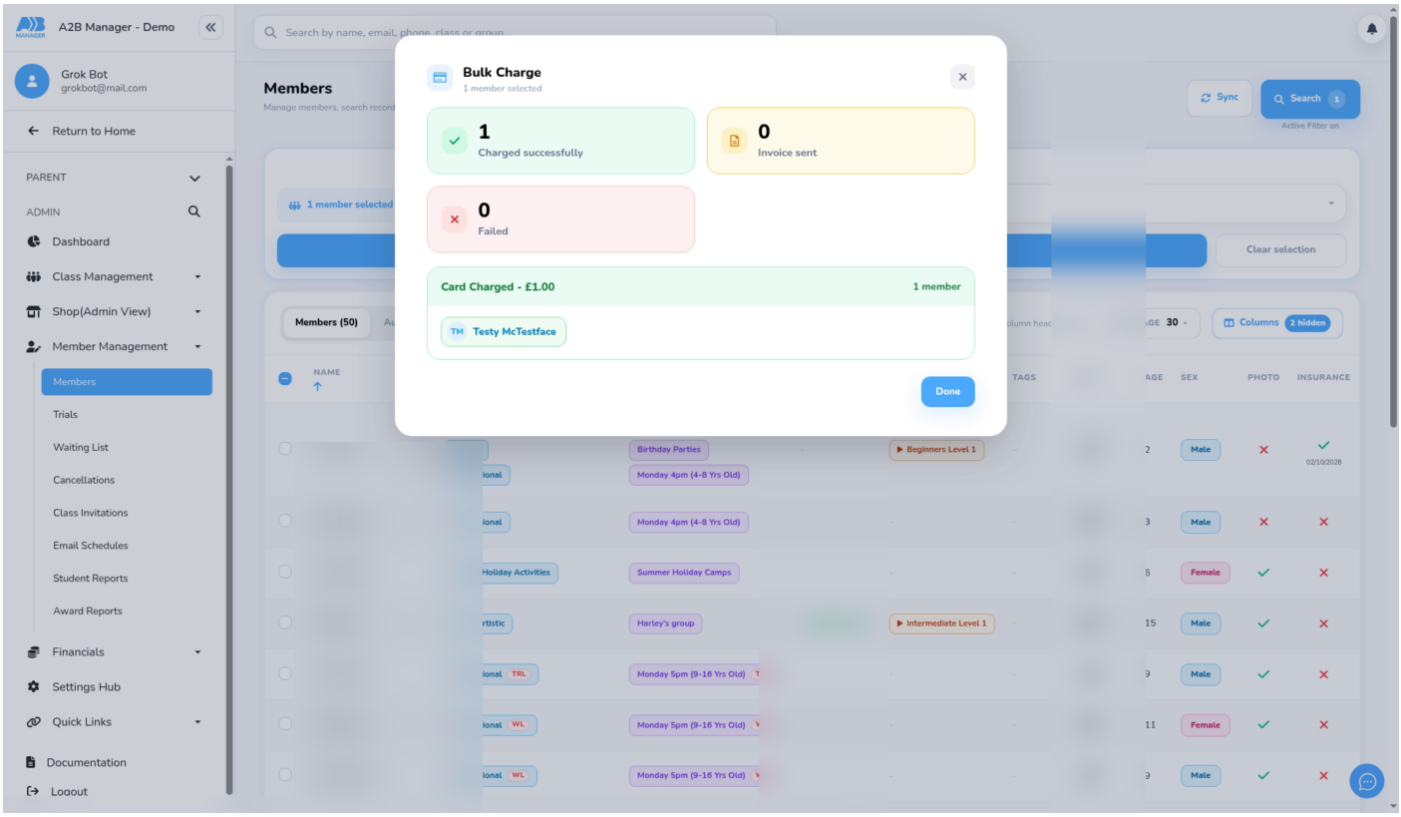
- Check the window says the right number of members selected.
- Enter the amount in **Pounds (£)** and **Pence**. The smallest charge is £1.
- Add a **Charge Reason**. Parents see it in their email and invoice.
- Pick an **Invoice Due Date**, tomorrow or later. It's only used if the card payment fails and an invoice is sent instead. The date box follows your browser's date format.



Step 4: The Bulk Charge window filled in

Step 5: Charge and check the results (1:14)

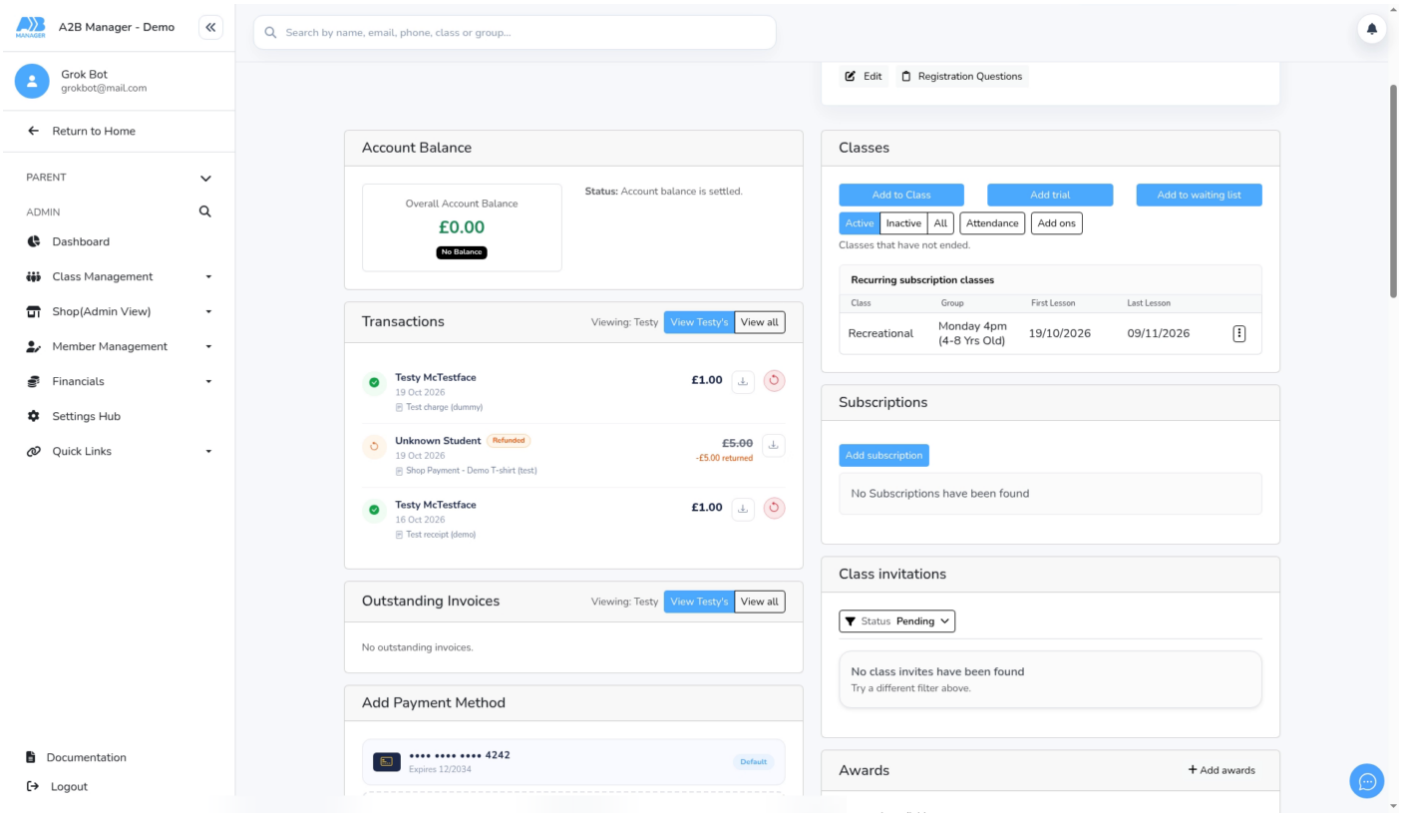
- **Important:** there's no review step. Before you click, check the button shows the right number (for example **Charge 1 Member**).
- Click **Charge**. Each member's saved card is charged straight away.
- The results show how many were **Charged successfully**, how many had an **Invoice sent** and how many **Failed**, with the members' names. Click **Done**.
- If you charge more than one member, it runs in the background. Follow progress in the notification at the top right, then view the results there.



Step 5: The results: 1 charged successfully

Step 6: Check the payment (1:25)

- Open the member's profile. The charge shows under **Transactions** with the date, amount and reason.
- The parent is emailed to say their card has been charged, with the reason and amount.



Step 6: The £1.00 charge in the member's transactions

If a card payment fails

- If the card is declined, or the parent has no saved card, an invoice for the amount is emailed to the parent instead, with your due date.
- The parent can pay it from the link in the email, or from the Payments section of their parent dashboard.
- You'll find unpaid invoices under **Financials** > **Outstanding Invoices**.

Charging one member from their profile

- On a member's profile, click **Charge** to open the same window for just that member. The button shows once the parent has a payment account set up.

Refunding a charge

- Go to **Financials** > **Successful Payments** and find the payment (it's listed under the parent's name).
- Click the refund icon, check the amount and click **Issue refund**. The payment then shows as Refunded.

- You can also refund from the refund icon next to the payment in the member's **Transactions**.

Good to know

- The charge goes to the parent's saved card straight away, so double-check the members and amount first.
- Parents are always emailed, whether the card is charged or an invoice is sent.
- The charge reason appears in the parent's email and on the member's transactions, so keep it clear.

> **Tip:** Charging just one member? Use the Charge button on their profile, so there's no chance of picking the wrong row.

FAQs

- **Is there a confirmation step?** No. Clicking Charge takes the payment straight away.
- **What if the parent has no card saved?** They're emailed an invoice to pay instead.
- **Can I charge less than £1?** No. The smallest amount is £1.
- **Can I undo a charge?** You can refund it from Successful Payments.

Download the PDF guide (optional)