

## How do I set up payment and credit card options for Event Planner?

Omar S. - 2021-01-19 - Events & Calendar

**Events Planner** permits you to take registration payments by credit card or check, and also lets you track payments made in person in cash.

**Note:** If your club is making use of the **Online Payment & eCommerce** module then you can pay for events online with your credit card. If the Club is not setup with this module, the only payment option available is payment by check. To find out more, please click on one of the links below:

[Online Payment and eCommerce for USA](#)

[Online Payment and eCommerce for Canada](#)

[Online Payment and eCommerce for Australia](#)

[Online Payment and eCommerce for Other Countries](#)

1. To access **Events Planner** feature, you must go to your club's homepage and login. Then, click on **Member Area** on the top right.
2. Along the top of the screen you will see several tabs. Click on the **Events** tab on the far right of the top toolbar.
3. At the left side of the screen, options will appear. Click on **Event Planner**.
4. You are now on the **Events** page. Select an event and click on the name.

### Events

Create A New Event

All EventsView Upcoming Events

Event Date ▼	Event Name	Active	Location	Event Chair	Actions
Jun 30, 2021	Rotary Tree Planting	✓	2060 Winston Park Dr	Clare Davis	Open   Delete   Copy
Dec 21, 2020	Holiday Party 2020	✓	Eugene V. Debs Memorial Hall	Edward Chu	Open   Delete   Copy

5. This brings you to the event details page. At the top of the page you'll see some basic details about the event. Under this, you'll see a number of event options. Scroll down the page to the section under the heading **Payment Settings**.

## Payment Settings

Event Fee: 15.00 USD

[Change Payment Settings](#)

Currency: USD

Payment Method: No payment account specified

Pay to Register? No

Check Allowed? Yes

6. Click **Change Payment Settings** to set up payment options.

## Payment Settings

Event Fee: 15.00 USD

[Change Payment Settings](#)

Currency: USD

Payment Method: No payment account specified

Pay to Register? No

Check Allowed? Yes

7. You can now set the cost of the event, and select payment methods. Enter the cost of the event in the field marked **Event Fee**. Then, select the appropriate currency from the drop down menu.

## Event Payment Settings

Event Fee:

15.00

Currency:

US Dollar

Payment Method: ☐ No payment account specified

☒ Sage Payment Solutions: Sage Test Payment Account (978985210861) - USD

☐ BeanStream Payment Solution: Bambora Test Merchant Account (300200484) - CAD

Require members to pay to complete registration? ☒ No ☐ Yes

Do you wish to allow payment by check? ☐ No ☒ Yes

Please make check/cheque payable to:  
Green Town Rotary Club

Send to:  
Treasurer Henry Bermis  
135 Herbert St.  
Green Town, WI

Thank you for your prompt payment.

[Cancel](#)

[Save](#)

8. Next, select the method your club will use to accept online credit card payments. If you select **No Payment Account Specified**, your club will need to process payment offline. The second radio button gives you the option to select the ClubRunner payment partner available in your country. For the United States, this is Sage Payment Solutions.

## Event Payment Settings

Event Fee:

Currency:

Payment Method:

- ☐ No payment account specified
- ☒ Sage Payment Solutions: Sage Test Payment Account (978985210861) - USD
- ☐ BeanStream Payment Solution: Bambora Test Merchant Account (300200484) - CAD

Require members to pay to complete registration? ☒ No ☐ Yes

Do you wish to allow payment by check? ☐ No ☒ Yes

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Green Town Rotary Club

Send to:  
Treasurer Henry Bermis  
135 Herbert St.  
Green Town, WI

Thank you for your prompt payment.

9. Your club has the option to accept payment by check. If you wish to accept checks, click **Yes** in the radio button next to **Do you wish to allow payment by check?** Otherwise, click **No**. If you do wish to accept payment by check, fill in the payment details in the provided text field.

## Event Payment Settings

Event Fee:

Currency:

Payment Method:

- ☐ No payment account specified
- ☒ Sage Payment Solutions: Sage Test Payment Account (978985210861) - USD
- ☐ BeanStream Payment Solution: Bambora Test Merchant Account (300200484) - CAD

Require members to pay to complete registration? ☒ No ☐ Yes

Do you wish to allow payment by check? ☐ No ☒ Yes

Please make check/cheque payable to:  
Green Town Rotary Club

Send to:  
Treasurer Henry Bermis  
135 Herbert St.  
Green Town, WI

Thank you for your prompt payment.

10. Finally, click **Save** to keep these payment details. Click **Cancel** if you wish to discard the information you entered.

## Event Payment Settings

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Event Fee:	<input type="text" value="15.00"/>
Currency:	<input type="text" value="US Dollar"/>
Payment Method:	<input type="radio"/> No payment account specified <input checked="" type="radio"/> Sage Payment Solutions: Sage Test Payment Account (978985210861) - USD <input type="radio"/> BeanStream Payment Solution: Bambora Test Merchant Account (300200484) - CAD
Require members to pay to complete registration?	<input checked="" type="radio"/> No <input type="radio"/> Yes
Do you wish to allow payment by check?	<input type="radio"/> No <input checked="" type="radio"/> Yes
	<div>Please make check/cheque payable to: Green Town Rotary Club  Send to: Treasurer Henry Bermis 135 Herbert St. Green Town, WI  Thank you for your prompt payment.</div>

## Related Content

- [How do I set my club up with online credit card payments?](#)
- [How do I create an event in Event Planner?](#)