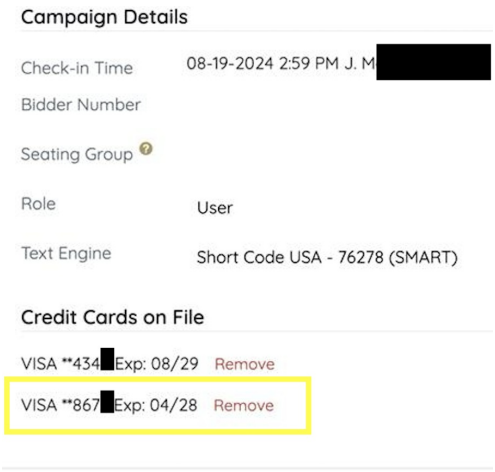
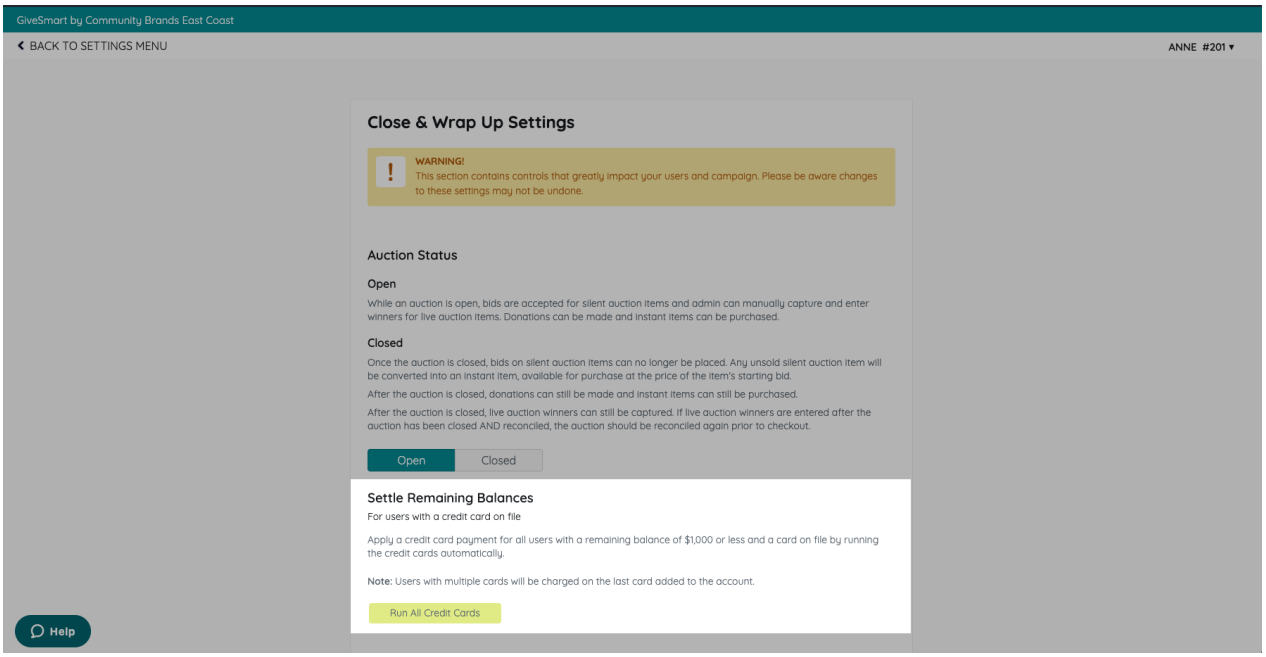
Settle Remaining Balances

Last Modified on 08/27/2024 11:54 am EDT

Process payment for all unpaid supporters with a remaining balance who are not marked as a Pledge, within a threshold range set by you, who have a credit card on file by running payments automatically. For supporters with **multiple cards on file,** the more recent one added to their account will be charged. The most recent credit card will be listed as the bottom credit card in the list of the user's details. For users with a balance greater than the set threshold, visit Checkout to process payment.



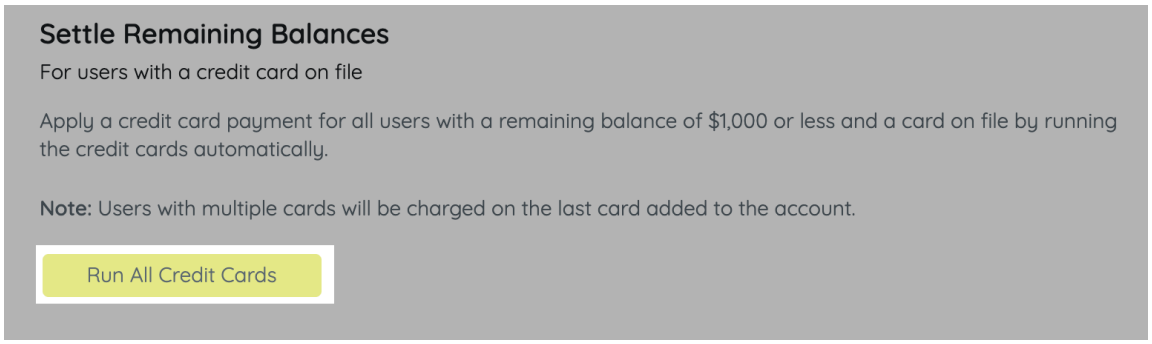
Tip: Run Unpaid Cards also appears in the **Payments** container on the **Dashboard** when there is at least one person with an unpaid balance within the threshold range set or less and has a credit card on file.



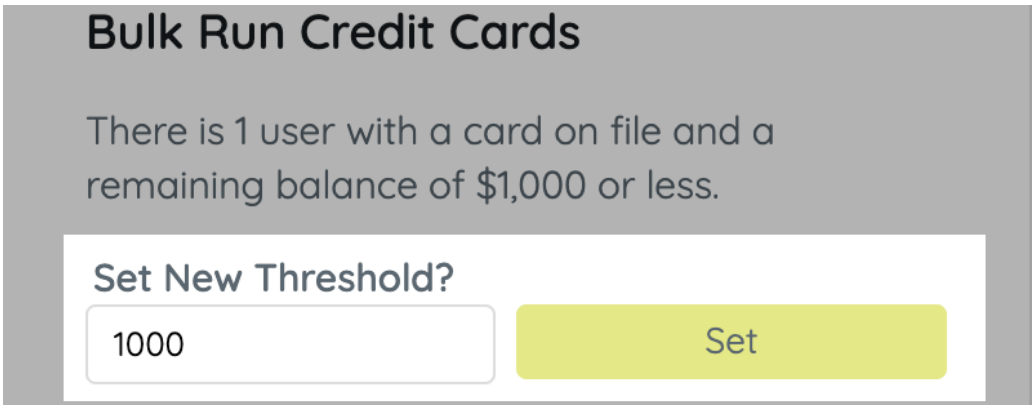
Steps to run all remaining balances

Note: If transaction fees are set to **Paid by Purchaser**, the fees are included in the remaining balance. If transaction fees are **Optional for Purchaser**, the option to add the fees to a remaining balance is bypassed and the fees will be paid by the organization.

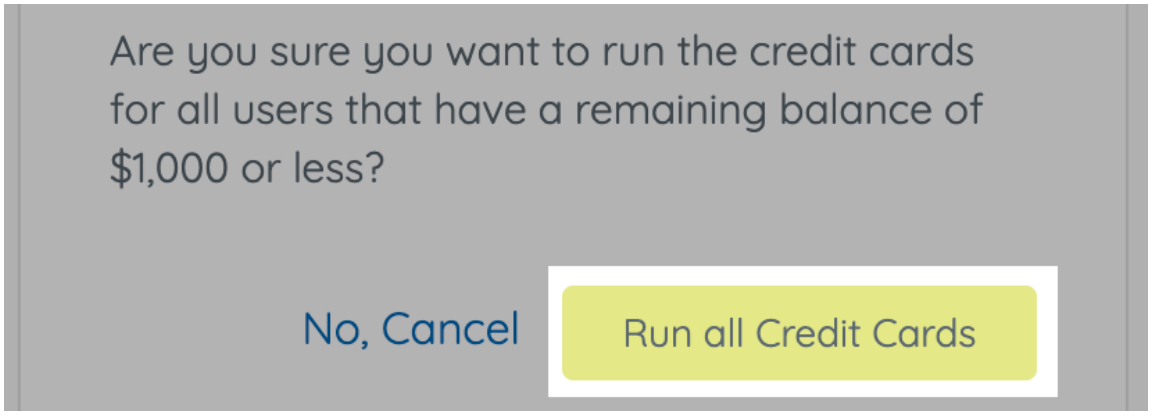
1. From the **Admin Navigation Menu,** select **Settings** > **Close & Wrap Up**.
2. Scroll down to **Settle Remaining Balances.**
3. Click **Run All Credit Cards.** Users who are marked as a Pledge will not have their balanced settled by selecting this option.



4. Adjust the default threshold amount and click **Set**.
    - The threshold amount must be within the $1 to $100,000 range.



5. Click **Run all Credit Cards**.



6. A second module appears when all the credit cards have been processed, which shows:
    - The number of successful payments.
    - The number of errors (declined credit cards).

Tip: Errors are most likely due to the Fraud Protection Purchase Limit on certain cards. The credit card company sends the cardholder a text asking them to verify the purchase. Once verified, the transaction will be able to be processed.