

Edit a Bank Account on a Family

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To edit a bank account on a Family record:

1. In the *Family* record, select the **Billing Info** tab.
2. Changes to the Bank Name, Bank Transit #, Institution ID, AccountType, and Account Name can be made on this page. **Save Changes**.
3. Select the **Edit Bank Account Info** button to edit the Bank Account #.
4. In the *Edit Bank Account* window, select **Enter/Change Acct #**.
5. Type the new number in the **Enter New Bank Acct#** field and **Save**.

The address associated with the bank account is taken from the contact who has **Billing Contact** set to **Yes** on their contact record.

To change the address associated with the bank account:

1. In the *Family* record, select the **Contacts** tab.
 2. Select the **View** link for the contact designated as the Billing Contact (Yes in the *Billing Contact* column).
 3. Update the address details in the contact record.
 4. **Save Changes**.
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