



Wahoo

SWIM SCHOOL

How Update Your Financials

Step 1

Login to your account.

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Don't have a login? [Signup](#)

Login to your account

Email

Password

[Forgot password?](#)

Login



Step 2

Click on the profile you wish to edit the financial information for.

Help My Info Step 1: Buy a Membership Step 2: Course Registration

Client List

Add Family Member Search

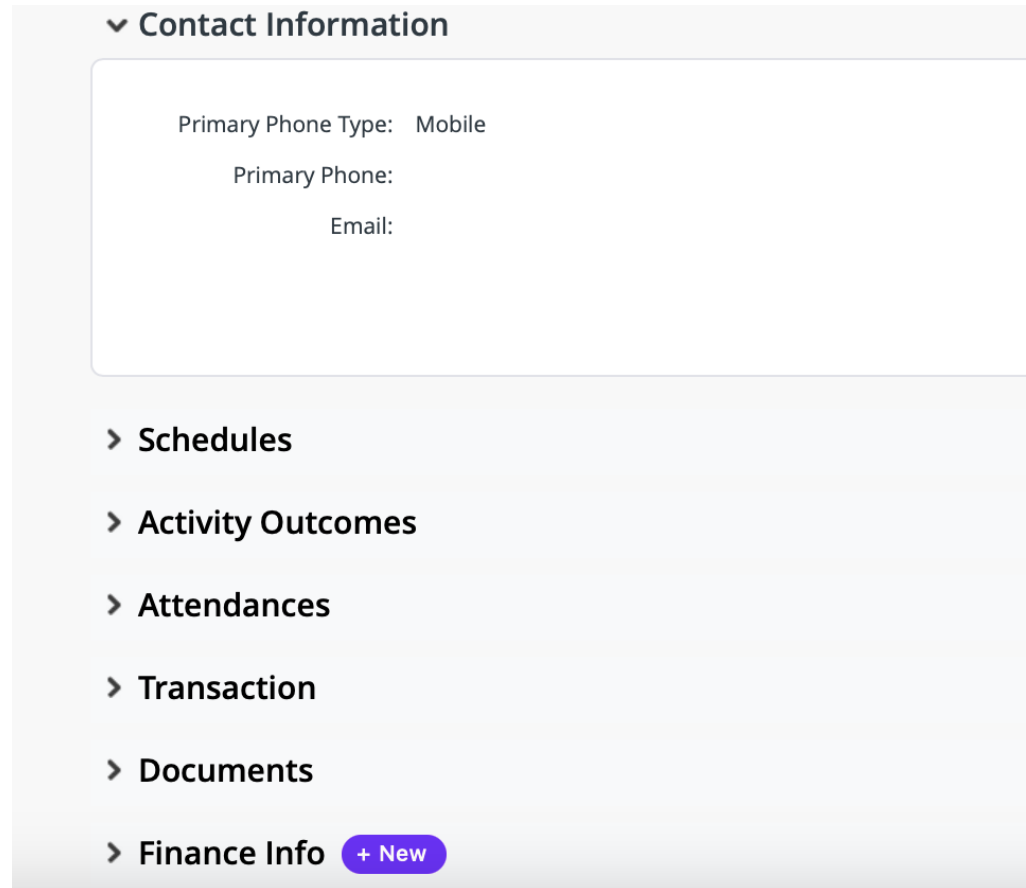
<input type="checkbox"/>	Full Name Simple ¹	Primary Phone	Email	Actio...
<input type="checkbox"/>	Timmy Swimmer	7808883333		> ..
<input type="checkbox"/>	Tommy Swimmer	7808883333		> ..

Showing 1 - 2 of 2 Print Export



Step 3

Scroll down to the bottom of the page to “Finance Info”.



▼ **Contact Information**

Primary Phone Type: Mobile
Primary Phone:
Email:

> **Schedules**

> **Activity Outcomes**

> **Attendances**

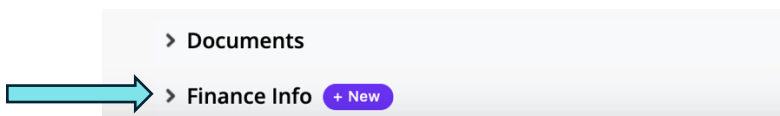
> **Transaction**

> **Documents**

> **Finance Info** [+ New](#)

Step 4

Click the button that says “New”



> Documents

→ > **Finance Info** [+ New](#)

This will let you edit your financial information.



Step 5

Update the information.

The screenshot shows the 'Edit Finance Info Details' form. At the top, there is a navigation bar with 'Help', 'My Info', 'Step 1: Buy a Membership', and 'Step 2: Course Registration'. The form is divided into several sections:

- Detail:** Includes 'Type' (Credit Card), 'Default' (checkbox), 'Times Failed' (0), and 'Notes' (text area). 'Holder Name' and 'Status' (Valid) are also present.
- Credit Card Detail:** Includes 'Credit Card Type' (Visa), 'Credit Card Number', 'Card Verification Value', 'Expiry Month' (--None--), 'Expiry Year' (--None--), and 'Billing Address'.
- Copy Address from Parent:** Includes 'Street', 'City', 'Country' (Canada), and 'State' (Alberta).
- System Info:** Shows 'Parent Record' as 'Tommy Swimmer'.

'Cancel' and 'Save' buttons are located at the top right and bottom right of the form.

Step 6

Once all your information has been updated. Click the save button located at the top or bottom of the screen.

This screenshot is identical to the one in Step 5, but it includes a callout box on the right side. The callout box contains two buttons: 'Cancel' and 'Save'. Two blue arrows point from the callout box to the 'Cancel' and 'Save' buttons on the form, indicating where to click to save the information.

