

How to View and Manage Membership Payments

Overview

The **Orders** and **Payouts** sections in your admin panel let you track all membership payment activity and monitor funds deposited to your bank.

- **Orders** — every payment transaction tied to your membership plans
- **Payouts** — the Stripe transfer history showing when collected funds hit your bank account

“ **Note:** The screenshots below were captured before any membership payments were processed. Screenshots showing populated order rows, order detail views, and payout history will be added once active payment data is available.

Step 1: Open the Orders page

1. Sign in to your admin panel at `yourcoopname.cooplyhq.com`.
2. In the left sidebar, scroll down and click **Orders**.

Admin panel left sidebar showing navigation items — desktop view

The **Orders** page opens. When families have completed checkout, each payment appears as a row in the list.

Orders page showing empty state — desktop view

Step 2: Understand the Orders list

Once payments exist, each row in the Orders list shows:

Column	What it shows
Date	When the order was placed
Order #	Unique reference number for the payment
Family	The family who made the payment
Type	The membership plan purchased
Amount	Payment amount charged
Status	Current payment status

Payment statuses:

Status	Meaning
Active	Payment succeeded; membership is in good standing
Past due	A renewal charge failed; the membership may lapse if not resolved
Failed	The payment attempt did not go through
Canceled	The membership was canceled

“ **Populated order list screenshot coming soon.** This will be added after Stripe is connected and families have completed checkout.

Step 3: Search and filter orders

Use the controls at the top of the Orders list to find a specific payment:

- **Search bar** — type an order number, family name, or member name to narrow the list
- **All Statuses dropdown** — filter to a specific status (for example, select **Failed** to see all payments that need attention)

Step 4: View an individual order

Click any order row to open the order detail view. The detail view shows:

- Order number, date, and membership plan
- Family and member name
- Payment amount and payment method on file
- Full payment history for that order, including any retry attempts

“ **Order detail screenshot coming soon.** This will be added once orders exist in the demo account.

Step 5: Handle a failed payment

When a renewal payment fails, CooplyHQ and Stripe handle the initial response automatically:

1. **The family is notified** — they receive an email prompting them to update their payment method.
2. **The order status updates** — the row shows **Past due** or **Failed** in the Orders list.
3. **Stripe retries the charge** — Stripe automatically retries failed payments on a schedule set in your Stripe dashboard.

As the admin, you can monitor failed payments by filtering the Orders list to **Failed** or **Past due** and following up directly with affected families if the payment is not resolved after retries.

Step 6: View payouts

Payouts show when funds collected from membership payments are transferred to your bank account.

1. In the left sidebar, click **Payouts**.

Payouts page with the Set up payouts prompt — desktop view

2. If Stripe is not yet connected, click **Set up payouts** to begin the Stripe onboarding flow. See [How to Set Up Membership Plans and Recurring Payments](#) for a full walkthrough of the Stripe setup process.
3. Once Stripe is connected, the **Recent Payouts** section shows each transfer — the date, amount, and destination bank account.

Recent Payouts screenshot coming soon. This will be added after Stripe is connected and at least one payout has been issued.

What's next

- [How to Set Up Membership Plans and Recurring Payments](#) — create the plans families purchase and connect Stripe
- [How to Invite Families and Manage Your Member Directory](#) — invite families and manage their membership status

Revision #3

Created 2026-06-24 02:12:16 UTC by Claude

Updated 2026-07-10 20:43:50 UTC by Claude