

## How to Manually Stop Auto-charge / Auto-bill

There are two scenarios where we would want to stop the auto-charge on a customer's account. The first is when they have canceled their account, but are still getting notified that billing attempts are being made. The second scenario is if a customer has NOT canceled yet, billing attempts are being made, and they want to cancel their account.

1. Check that the customer's subscription has been properly canceled by going to their customer record, scroll down the page and click **Orders**, and check under "Subscriptions." Each subscription should say "No" under the "Auto\$" column – continue to Step 2.

Subscriptions Add Subscription

View	Qty	Start Date	Bill Amt	Auto\$	Status	Cycle	Next Bill	Credits
The Manifesting Academy - Monthly - \$37.33	1	10/26/2018	\$37.33	No	Inactive	Month	12/30/2018	0

If it says "Yes," for any subscription, do the following:

- a. Scroll back up, click **Tasks**, and scroll down to "Notes."
- b. In the drop-down menu to the right, select Academy Immediate Cancellation, and click **Add Note**.

Notes View All Academy Immediate Cancellat Add Note

Updated	Assigned User	Description
11/30/2018	[Not Assigned]	<a href="#">Received Manifesting Academy Billing Failure Sequence #1</a> Received Manifesting Academy Billing Failure Sequence #1

- c. Refresh the page to confirm that all subscriptions now say "No" under the "Auto\$" column.
2. Under "Recent Recurring Charges," look at the "Current Balance" column for an amount in red. This indicates that a billing attempt has failed and that future auto-charge attempts may be made. Click the **date** on the corresponding row. A new window will open.

Recent Recurring Charges More Invoices

Date	Order	Payment Plan	Status	InvoiceTotal	Amt Paid	Current Balance	RemainingBalance
11/30/2018	BusisiweNkosi - The Manifesting Academy - Monthly - \$37.33	Has A Payment Plan	No Refund Issued	\$37.33	\$0.00	\$37.33	\$37.33

3. Scroll to "Payment Plan". Underneath, it should say, "Auto Charge: Yes(Has Failed)" which indicates that future billing attempts will be made. Click **Edit Payment Plan** on the right.

Payment Plan Edit Payment Plan

Auto Charge: Yes(Has Failed) [\[View Payment Attempt History\]](#)

4. Under Auto Charge Settings, select **No** for "Auto Charge". In the drop-down menu for "Credit Card", select **None**. Finally, scroll down and click **Save**.

Auto Charge Settings

Auto Charge Yes  No

Credit Card  Add

5. Refresh the page for the customer record, and click on the same date as in Step 2. Look for “Auto Charge: No(Has Failed)” to confirm that the auto-charge has been cancelled successfully.

**Payment Plan**

Edit Payment Plan

Auto Charge: No(Has Failed) [\[View Payment Attempt History\]](#)