



How to Manage Chargebacks

To view the recent chargebacks in your center you will want to navigate to the Billing tab on the left-hand menu. Scroll down to the “Payments” section and click on “Manage Chargebacks”.

ACH Returns	Amount
1/11/2023 Kayden	\$50.00
1/11/2023 Kayden	\$50.00
1/11/2023 Kayden	\$50.00
1/11/2023 Kayden	\$150.00
1/11/2023 Kayden	\$50.00

Now you will be able to view any chargebacks that have happened at your center in your chosen date range. You may choose to show resolved chargebacks as well.

Manage Chargebacks
Find and manage chargebacks.

Start Date: 01/08/2023 End Date: 02/07/2023 Show resolved chargebacks Org(s): [Dropdown]

Update

After choosing your date range and clicking "Update" you will see a list of all the invoices that concurred a chargeback. From there, you can select "action" on the right side of the line item to choose from a few options;

- **View Invoice:** This will take you directly to the invoice that received the chargeback. This will give you insight as to which account/parent the chargeback came from.
- **Charge Family:** This option will open the invoice back up to the family so they can make another payment on their invoice. The total on the new invoice will be the same as the original + their chargeback fee.
- **Mark Resolved:** Once the invoice has been paid and the account is in good standing, you can mark it resolved.



Manage Chargebacks

Find and manage chargebacks.

Update

Start Date

01/08/2023

End Date

02/07/2023

Show resolved chargebacks

Org(s):

Date	Person	Invoice	Reason	Amount	Status	Action
1/09/2023	Kayden	337	No Account/Unable to Locate Account	\$100.00	Open	Action ▾
1/11/2023	Kayden	379	No Account/Unable to Locate Account	\$150.00	Open	Action ▾
1/11/2023	Kayden	380	No Account/Unable to Locate Account	\$50.00	Open	Action ▾
1/11/2023	Kayden	380	No Account/Unable to Locate Account	\$50.00	Open	Action ▾
1/11/2023	Kayden	380	No Account/Unable to Locate Account	\$50.00	Open	Action ▾
1/11/2023	Kayden	381	No Account/Unable to Locate Account	\$50.00	Open	Action ▾

To charge the family for the chargeback fee, click on “actions” for that line item and choose “Charge Family”.

On the “Add Charge” page choose

- Item - NSF Fee, Returned Payment Fee, etc.
- Amount
- Check the “Send Invoice Now” box
- Check the “Mark as Resolved” box
- Then click “save”

Add Charge



Item	NSF Fee
Notes	
Price	25.00
Discount reason (if applicable)	
Quantity	1
Amount	\$25.00
Reference	Chargeback # ZRRF9L5D3RJKF242
	<input checked="" type="checkbox"/> Send Invoice Now
	<input checked="" type="checkbox"/> Mark as resolved

Save

Cancel

After clicking save the line item will be removed from the Manage Chargebacks page and the fee is now under the child’s transaction tab. The family will be notified of the fee and will be able to make the payment.