

## Pausing, cancelling or modifying recurring billing with...

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To stop billing on an individual client but allow them to keep access to a membership, you can manually "pause billing" or even edit the amount they pay on a monthly basis by managing their client/subscriber record for the membership. There you will find the "pause billing" option or the settings for recurring billing amount:

To reach the client record, from the main menu under Manage >> Clients, and then search for either a specific client or search for all clients of an offer (membership/product/podcast/rss feed).

Alternately, if you are viewing the offer (under Manage >> membership/product/podcast/rss feed) you'll find a "Members" or "Subscribers" area in the overview menu for each offer. There you can click "View Active" or "View All" to see the client list for that offer.

From the results of the client search or client list, click the Edit link next to the name of the client to view the client record.

The below methods will work for subscribers whose payment method was Credit Card (via merchant account) and who have future recurring payments scheduled. In that case, the "Recurring Billing Details" box will appear in the client record, near the bottom.

**To pause billing:** Use the option "Delay Recurring Billing" found in the "Recurring Billing Details" area of the subscriber record.

» Enable this option in order to delay billing for this subscriber indefinitely (or until the box is no longer checked). The 'Next Billing Attempt' date will advance by one day instead of rebilling the client. Billing will resume when you uncheck the box. All remaining installments will be charged. You only need to Delay Recurring Billing if the subscriber is marked as 'Subscribed' or 'Paused'. (This is because the system will only bill subscribers with the status of 'Subscribed' or 'Paused'.)

» If you have a list of multiple users for whom you want to delay recurring billing, such as an entire client list for an offer, you can view the list of subscribers, and at the bottom of the list, click the Check/Uncheck All link to check the box by all the subscribers, then find the button "Delay Recurring Billing".

### To change billing details:

» **Recurring Subtotal** - Edit this to change the subtotal they will be billed for all future transactions (same applies for Shipping, Handling, Taxable Amount, and Tax.)

» **Expiration Date** - Edit this to change their next billing date.

» **Billing Interval** - Edit this to change how frequently future recurring payments will occur

» **Installments Needed** - Edit this to change how many future recurring payments will be collected (Set to 0 for Unlimited Installments)

» **Installment Collected** - Edit this if your installments needed is a finite number and you want to

change how many installments the system thinks has been collected (This stays at 0 if you're collecting unlimited installments)

To cancel billing permanently, simply unsubscribe the client. (This removes their access.)

**NOTE:** If the payment method is PayPal, to pause, cancel or modify recurring billing, you **must** manage it from your PayPal account instead:

[http://support.nanacast.com/index.php?\\_m=knowledgebase&\\_a=viewarticle&kbarticleid=256](http://support.nanacast.com/index.php?_m=knowledgebase&_a=viewarticle&kbarticleid=256))

**Related:** You can set up "membership groups" if you want clients to be automatically cancelled when they upgrade/downgrade to another offer:

[http://support.nanacast.com/index.php?\\_m=knowledgebase&\\_a=viewarticle&kbarticleid=10](http://support.nanacast.com/index.php?_m=knowledgebase&_a=viewarticle&kbarticleid=10)