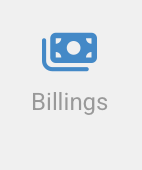
Billings Module

October, 2023

# Overview

Managing client billing and service requests is a seamless process with our system. Clients can be billed through a subscription model with the option to access additional services or memberships, and members can request specific services as needed. The billings module allows you to handle transaction statuses and receipts and provides a clear view of upcoming and failed transactions through dedicated tabs.

Within the [settings module](https://docs.google.com/document/u/0/d/1VNIJNiZWlJ2WoEeYfFHq_H-JGvZXhcU7pQEz6tOyknQ/edit), you can conveniently manage custom service offerings.

## Integrated Billings

Bill clients for memberships or one time transactions straight from within the portal. The portal gives you the option for multiple payment methods including credit/debit, bank transfer and cash.

## Manage Transactions

Scheduled transactions can be put on hold or canceled from the upcoming tab using the ellipses. Transactions can be refunded from within the portal as well.

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# How To

## [View all client transactions](#3a7swntk8i8g)

## [View/email receipt](#kix.rvhqph1hxxta)

## [Filter transaction](#4a4inn6ig7g7)

## [Add a transaction / offering](#yuwy4zrfkuvs)

## [Issue a refund](#88ib6izfsf5y)

## [View upcoming transactions](#pol8yxf1gcqs)

## [Hold/cancel upcoming transactions](#ua4iyyfg9n3p)

## [View Failed transactions](#oh9mlypu1o6o)

**Transactions**

This tab has all the information about client transactions including recurring memberships or one-time payments. Transaction **type** is shown in the description column, if the transaction is for a recurring membership, the **dates covered** will be shown in the pay period column. Transaction **status** (succeeded or failed) can also be viewed here.

**Quick View function (+)**

The purpose of this view is to provide a convenient overview of recurring memberships and non-recurring offerings for each client transaction.

* Click on the + sign on the left-hand side of transactions to get a quick view of client transactions.

**V****iew/email receipt:**

Receipts include information such as receipt ID, date/time of the transaction, type of transaction (recurring membership/non-recurring offering/custom offering charges), and the full amount of the transaction.

Receipts for each transaction can be viewed and emailed to clients.

* Go to ⋮ on the far right of the transaction.
* Option to add notes to the transaction
* Option to view receipt
  + Receipt will open in a new tab and can be printed by using the  icon on the top right corner
* Option to email receipt
  + By clicking confirm, the receipt will be emailed directly to the client.

**Filter transaction****s**

Transactions can be filtered based on clients’ names, transaction start/end date, or transaction offering type.

Transactions can be looked up using the search bar to type the client's name, or by using one or multiple filters.

* Use the  filter icon to filter by:
  + Client First Name
  + Client Last Name
  + Transaction Start Date i.e. membership start date
  + Transaction End Date i.e. membership/pay period end date
  + Offering i.e. one-time transactions

**A****dd a one-time transaction**

Offerings are non-recurring transactions that can be added for patients with or without an approved membership.

* Click on the +Add button on the top right
* Select a patient from the drop-down
* Select an offering
  + Offerings options can be updated by admins in the [settings](https://docs.google.com/document/u/0/d/1VNIJNiZWlJ2WoEeYfFHq_H-JGvZXhcU7pQEz6tOyknQ/edit) > ancillary offering
  + Custom one-time offerings can be selected by choosing the “Others” option and adding a custom price. (Option to add a note)
* Select from payment options:
  + Use the card on file for the selected patient
  + Add Credit/Debit card
  + Bank Transfer
  + Cash

This can also be done from the [clients module](https://docs.google.com/document/u/0/d/1U56J66Q1uRzs3DVkURMmQuJKaOeLYn1FhTZIQinRE7c/edit) using ⋮ > Add transaction

**I****ssue a refund**

Transactions that have successfully been charged can be refunded back to the original form of payment.

* Use the ellipses ⋮ on the far right of the transaction you want to refund and choose the refund option.

**Upcoming transactions**

This tab lists clients who are enrolled in recurring memberships and provides details on upcoming transaction charges depending on membership start date and amount.

**Quick View function (+)**

The purpose of this view is to provide a convenient overview of upcoming recurring memberships and non-recurring offerings.

* Click on the + sign on the left-hand side of transactions to get a quick view of upcoming transaction details.

**Hold****/Cancel upcoming transactions**

Upcoming transactions can be put on **hold**. This will stop the transaction from being charged to the payment method on file until it has been **reactivated**. Upcoming recurring charges can be **canceled** for that particular time period, however, to stop these charges indefinitely, the patient’s membership needs to be canceled by using the [clients module](https://docs.google.com/document/u/0/d/1U56J66Q1uRzs3DVkURMmQuJKaOeLYn1FhTZIQinRE7c/edit).

* Go to the upcoming transactions tab and use the ellipses ⋮ on the far right of the transaction:
  + Choose  on hold option. Once put on hold, memberships can be reactivated by choosing the Activate option
  + Choosethe Cancel option to cancel the particular upcoming transaction (does not cancel all following transactions for that membership).

**Failed transactions**

Failed transactions are transactions that did not go through due to issues in the form of the payment method selected for that transaction. It can be viewed using the failed transaction tab.

NOTE: If there are any missing items or if you require access to something mentioned above, please feel free to contact Vitafy support at support@vitafyhealth.com for any inquiries.