



Custom Cancel Reasons

User Guide

Version 1.0

Date: April 23, 2018

Table of Contents

VERSION TRACKING	3
INTRODUCTION	4
ADD CUSTOM CANCEL REASONS	4

Version Tracking

Version Number	Modification Date	Modified By	Changes Completed
1.00	04-23-2018	Product Development	Initial Documentation Completed.

Introduction

It's never pleasant to think about your members cancelling their accounts, but of course it happens. When consumers cancel in the Segpay Consumer Portal, they are asked to select a reason for cancelling; for example, they got tired of the service or it is too expensive, etc. That way, you can respond to feedback and improve your service if you feel it's necessary.

Run the *Recent Cancel/Expires* report in the Merchant Portal to see which reasons *your* consumers selected most often when cancelling – and now, you can add even more descriptive reasons to provide more insight into why people are cancelling, and help you tailor your service better to meet customer needs. Use this feature to create your own custom reasons, and when one of your consumers cancels, we'll display your custom reasons along with our own default reasons.

To get started, login to the Segpay Merchant portal at: <https://mp.segpay.com>, point your mouse at the **My Consumers** menu and select **Custom Cancel Reasons**.

Add Custom Cancel Reasons

To add one or more customized cancel reasons to our list of default reasons, follow these steps:

1. Select the merchant where these new custom cancel reasons will be presented during the cancellation process (assuming you have more than one merchant account). Notice the search box, which comes in handy if you have a long list of merchants to scroll through.

Merchant

20656 - SegPayEU1020211

20654 - SegPay USIPSP1022
20656 - SegPayEU1020211

2. Enter one new Cancel Reason.

Cancel Reason (50 characters max)

Each custom reason can be a maximum of 50 characters long.

Note that our current default list of cancel reasons is displayed in the body of the page so you can see what is already there and not duplicate those default reasons (see image below).

Note: The following default cancel reasons are automatically included.



After you enter your custom reason, click **Add Reason** and your text will appear in the *Active* box in the body of the page (see image below). Once you click **Save Changes**, your new reason(s) will immediately be displayed for any consumer who cancels under this Merchant account.

If you change your mind, you can de-activate any of your new custom reasons. Select one or more reasons in the *Active* box on the left, and click the right-arrow to move your selection(s) to the *Inactive* box on the right. Use CTRL or SHIFT to select multiple reasons at once. Or click the double right-arrow to move all the currently active reasons to Inactive. Use the left arrow to make a reason Active again, or the double left-arrow to move everything from Inactive to Active.

If you prefer, you can also drag and drop reasons between the Active and Inactive columns. Just click a reason to select it, and hold down your left mouse button while using the mouse to move the reason from one column to the other.

When you click **Save Changes**, the reason(s) listed in the Inactive box will no longer be presented to consumers who cancel.

ACTIVE	INACTIVE
The Content Was Not What I Expected.	

Save changes

To create additional cancel reasons, repeat the steps above.

Note: Segpay's default cancel reasons are translated so most consumers can view them in their local language. Coming soon, you will be able to translate your custom cancel reasons into multiple languages as well. However, for now, custom reasons are displayed for all consumers exactly how you enter them here.

Please feel free to let us know any thoughts or suggestions you have about Custom Cancel Reasons or anything else, by emailing Techsupport@Segpay.com.