CREWSTRO

Lockout and cancellation fees

How to set the two fees, how to charge for a visit that did not happen straight from the Schedule, and what each choice does.

For owners of cleaning companies, managers and office assistants.

November 2026 edition

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Part 1. Understand and set up

1

What the two fees are

Sometimes a visit does not happen because of the client: they ask to skip, they cancel at the last minute, or the team arrives and cannot get in. Crewstro lets you charge for that at the moment you cancel the visit, without leaving the Schedule.

There are two fees, and each one goes with a cancellation reason:

Fee	Used when the reason is
Skipped visit fee	**Client asked to skip** or **Client cancelled**
Lockout fee	**Lockout: the team could not get in**

The other reasons (**The company postponed or could not go**, **Weather or emergency**, **Other reason**) are not on the client. For those, Crewstro does not offer a charge.

CAREFUL Nothing is charged by itself. The fee is only the amount that comes filled in. You decide, visit by visit, whether to charge.

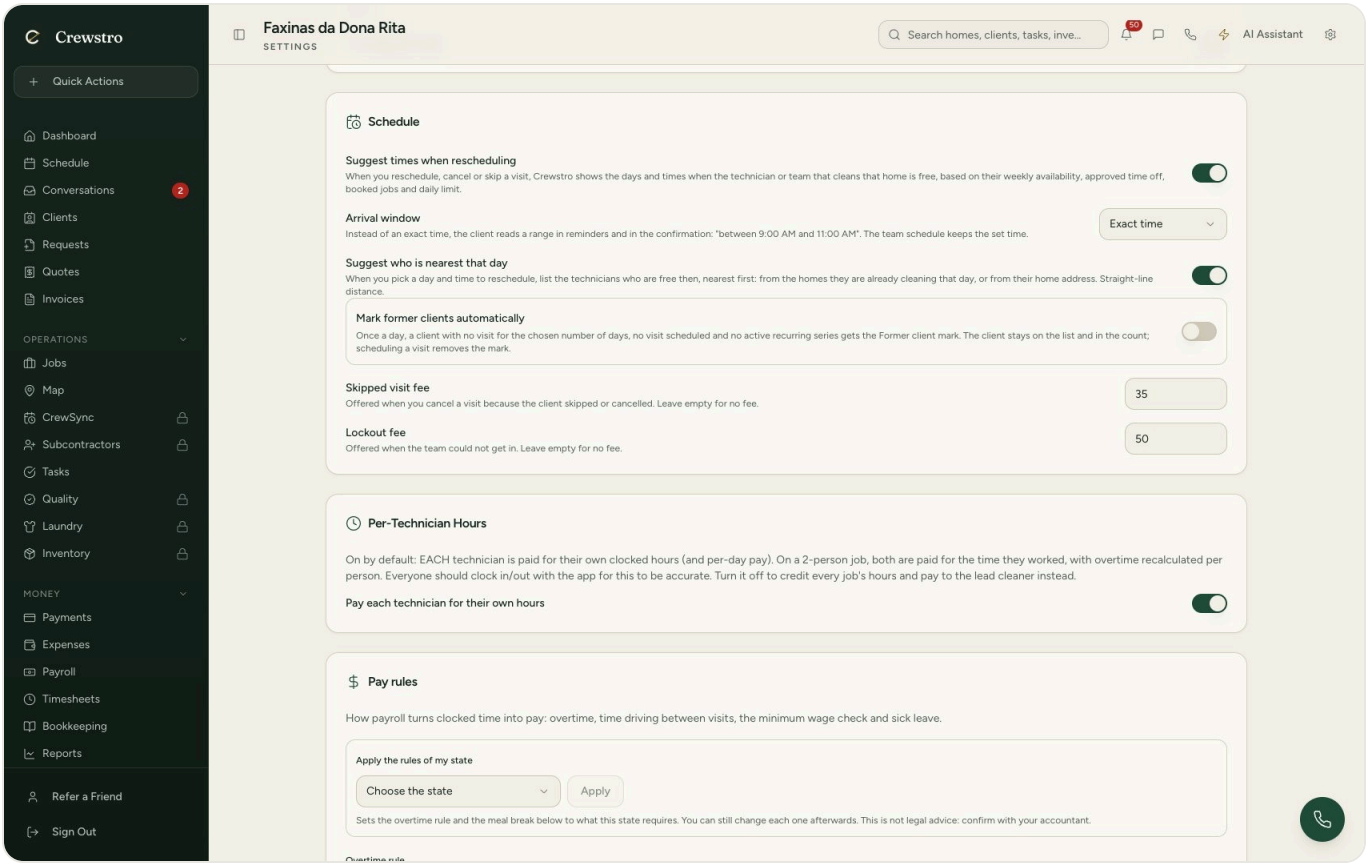
TIP Agree on the rule with the client beforehand: put the fee in your service agreement or in your policies. A fee the client never heard of usually turns into a complaint.

2

Set the amounts

WHERE IT IS Settings > Operations tab > Schedule card

1. In the left menu, click **Settings**.
2. Open the **Operations** tab.
3. In the **Schedule** card, go down to **Skipped visit fee** and **Lockout fee**.
4. Type the amount of each one, in dollars, and click outside the field. It is saved right away.



The two fees, in the Schedule card of the Operations tab.

What if I leave it empty?

An empty field means **no fee** for that reason. You can still charge: when you cancel, the amount comes filled in with the **full price of the visit**, and you can change it.

How the setting is	Amount that comes filled in when you cancel
Fee filled in (for example, 50)	The fee: 50
Fee empty	The full price of the visit
Fee empty and visit with no price	Nothing. You type the amount then

> **TIP** The amount filled in is only a suggestion. On any cancellation you can change the number before you confirm.

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What you need to charge a card

You can always **send the invoice**. To **charge the saved card right away**, two things are needed:

- [ ] The company takes payments through **Stripe** and the account is ready to charge.
- [ ] The client has a **saved card** on their profile.

When one of the two is missing, the card option does not show and the screen says: **This client has no saved card to charge**.

> **CAREFUL** A company that takes payments through Square: for now only the option to send the invoice. Charging the saved card, on this screen, is Stripe only.

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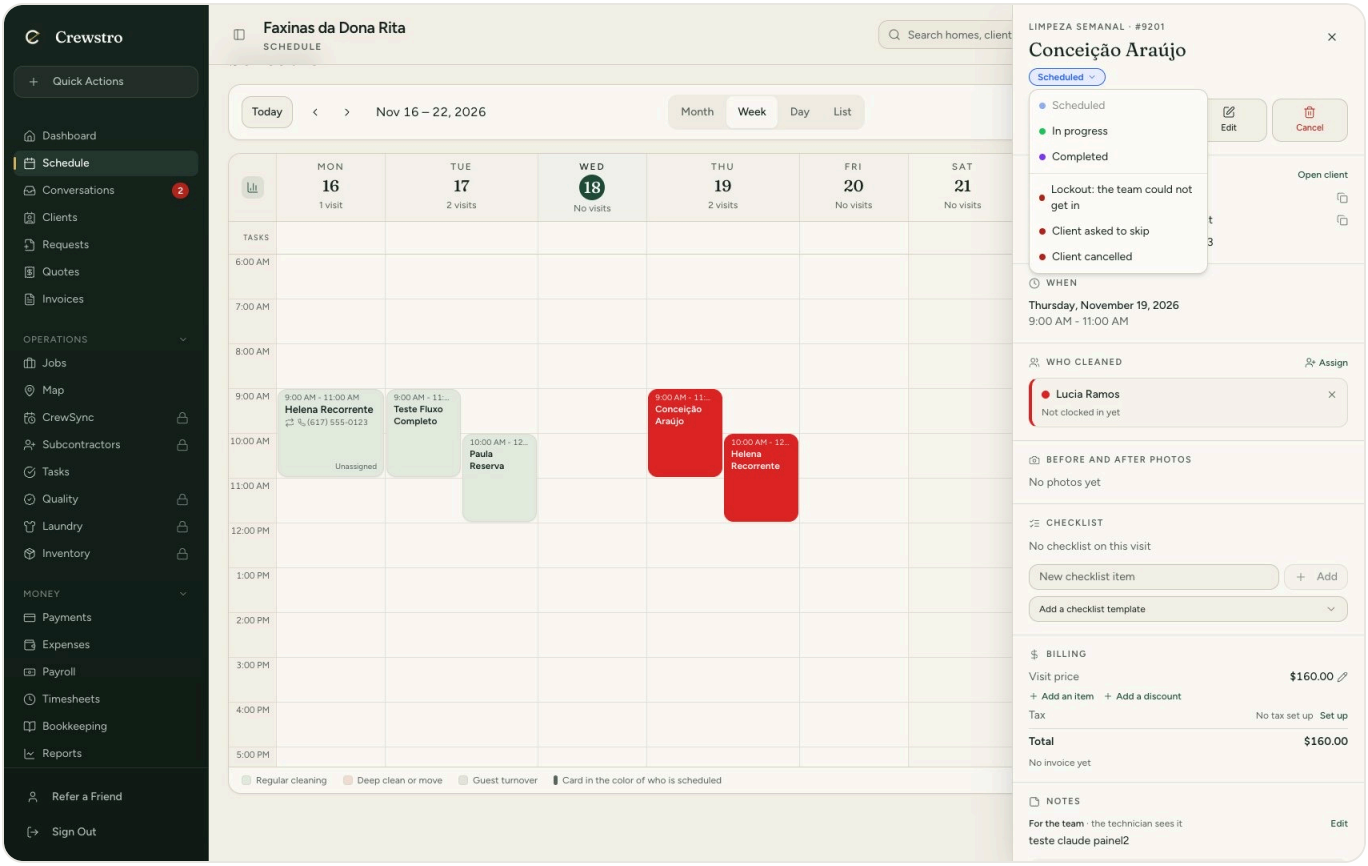
Part 2. Charge for a visit that did not happen

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Cancel the visit from the Schedule

WHERE IT IS Schedule > click the visit > panel on the right

1. In the **Schedule**, click the visit. Its panel opens on the right.
2. At the top of the panel, click the status badge (for example, **Scheduled**).
3. Pick the reason: **Lockout: the team could not get in**, **Client asked to skip** or **Client cancelled**.
4. The **Cancel this visit?** window opens with the reason already chosen.



The status menu, at the top of the visit panel.

The **Cancel** button, at the top of the panel, opens the same window. There the reason is picked inside it.

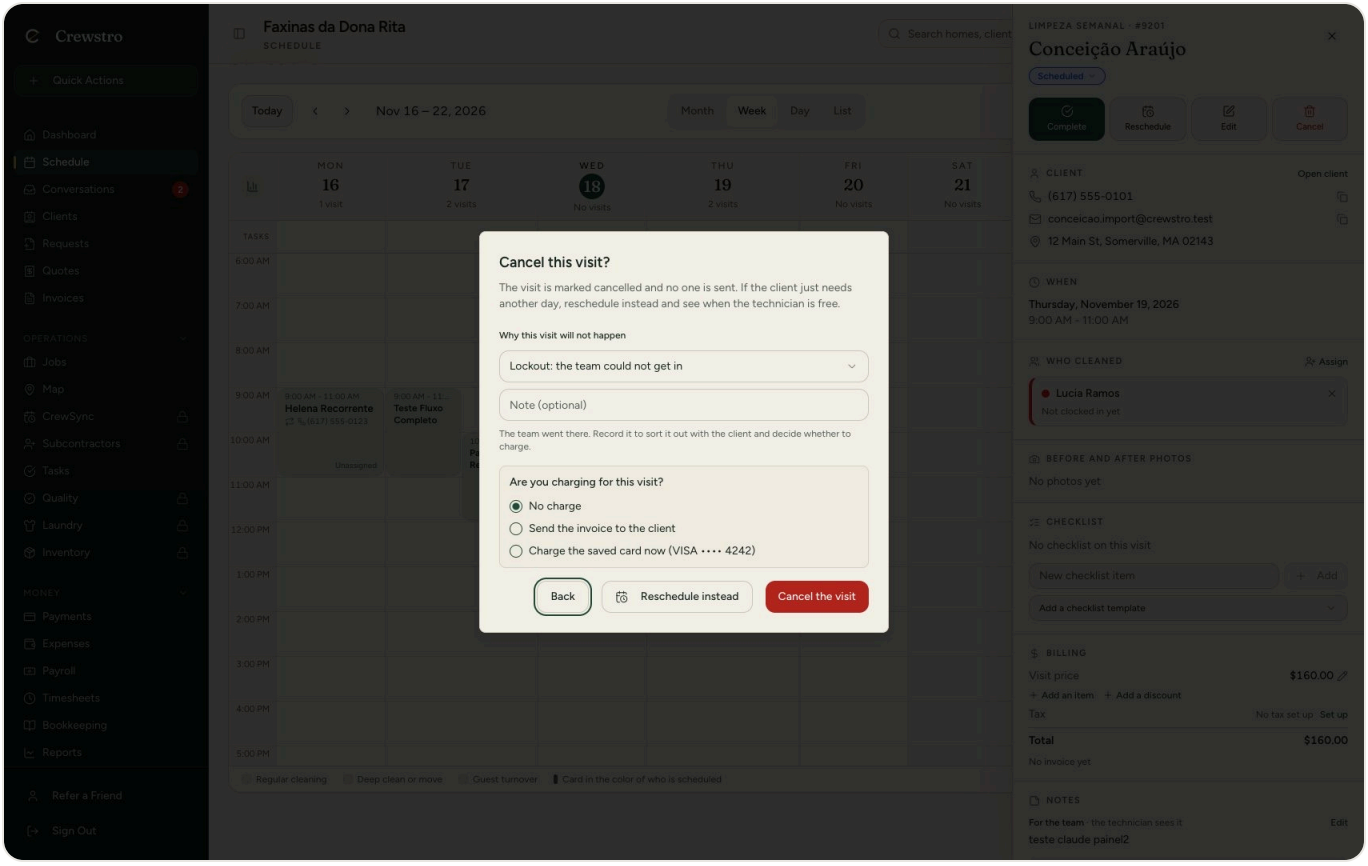
> **TIP** If the client only needs another day, use **Reschedule instead**. The visit is not cancelled: Crewstro shows the free days and times of the technician and you pick the new one.

The **Note** field is optional. What you write is kept with the reason, in the client history.

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The question "Are you charging for this visit?"

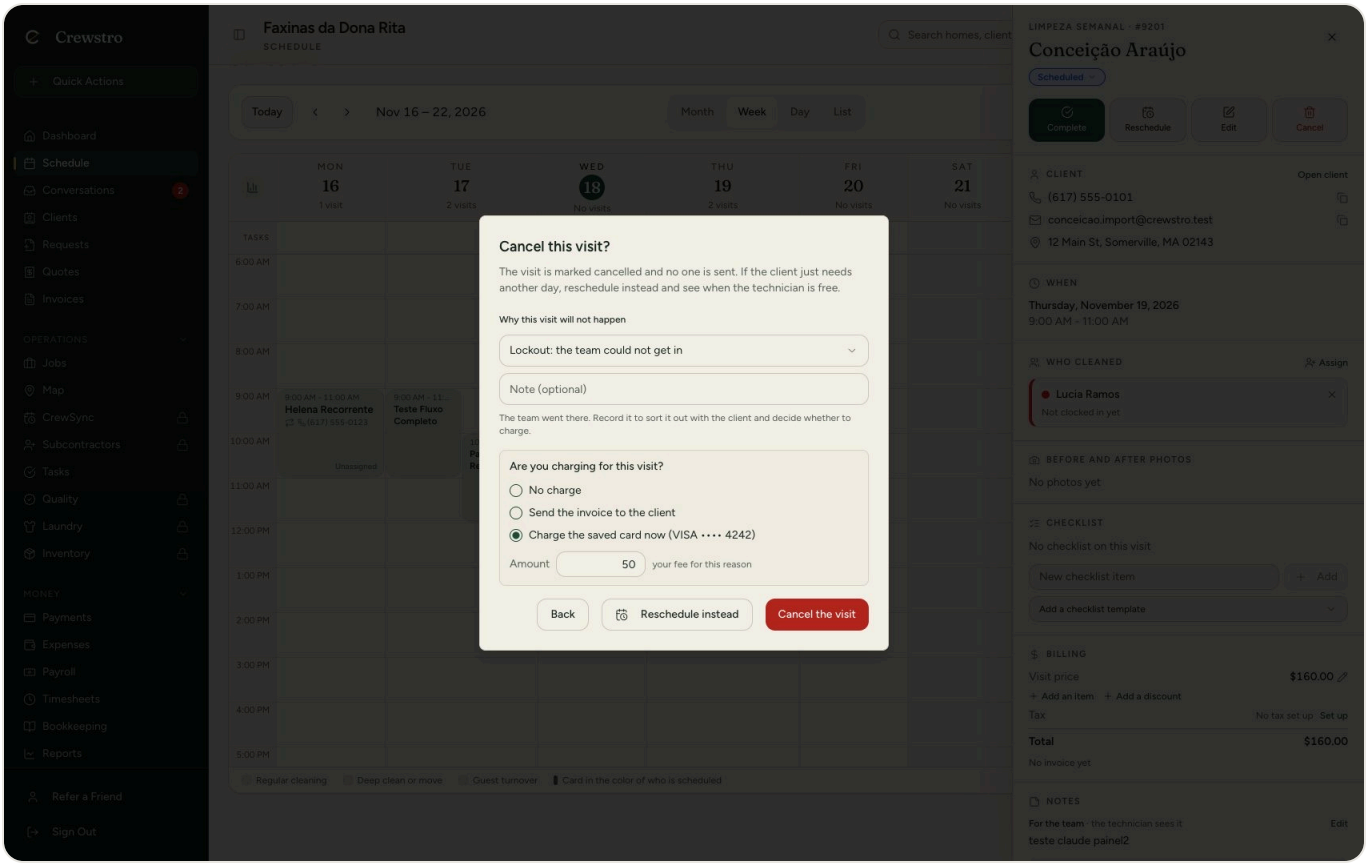
When the reason is on the client, the window shows the question **Are you charging for this visit?** with the options:



The cancel window, with the question and the options.

Option	What it means
No charge	The visit is cancelled and nothing else. This is the option that comes selected.
Send the invoice to the client	An invoice is created for the amount chosen and it goes by email for the client to pay.
Charge the saved card now	The invoice is created and the client saved card is charged right away. It shows the card brand and its last digits.

When you pick one of the two charging options, the **Amount** field appears. Next to it the screen says where the number came from: **your fee for this reason** or **full price of the visit**.



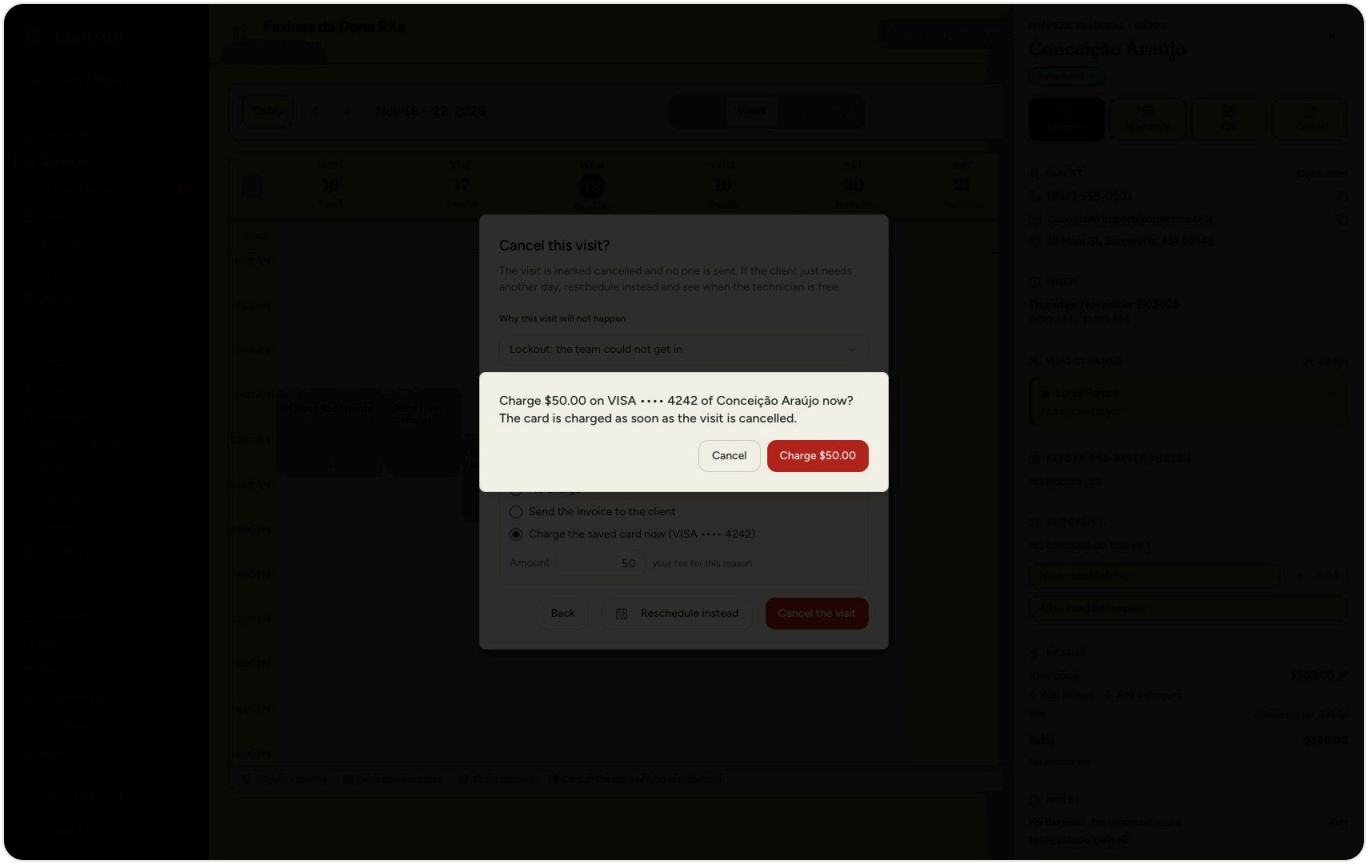
Charging the saved card: the amount came from the lockout fee.

1. Pick the option.
2. Check the **Amount**. Change it if you need to.
3. Click **Cancel the visit**.

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The confirmation before the card is charged

Charging a card is real money. So, before it charges, Crewstro asks once more, with the **amount**, the **card** and the **client name**.



The confirmation: amount, card and client.

- Click **Charge** to go on. The visit is cancelled and the card is charged next.
- Click **Cancel** to go back to the previous window. Nothing was cancelled or charged.

> **CAREFUL** Read the client name and the amount before you confirm. After the confirmation the charge goes out right away.

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Part 3. What happens next

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What happens with each choice

In every case the visit is cancelled first, with the reason kept in the client history. The invoice and the charge come after.

You chose	The visit	The invoice	The client
No charge	Cancelled, with the reason	None	Gets nothing
Send the invoice	Cancelled, with the reason	Created and marked as sent	Gets the email with the link to pay
Charge the saved card	Cancelled, with the reason	Created and paid	Has the card charged right away

The invoice is created with the subject **Lockout fee** or **Skipped visit fee**, with one line that says the service and the date of the visit. It goes out in the client language.

Where to see it later

- **Invoices**: the fee invoice shows in the list like any other. That is where you resend it, collect it or cancel it.
- **Reports > Cancellations and skips**: how many visits each client skipped, cancelled or locked the team out of, with the reason and the amount.
- **Client profile**: the cancellation reason stays in the history, and it counts in the client health score.

> **CAREFUL** A cancelled visit leaves the Schedule. To see what was cancelled, use the report or the client profile.

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On the other screens

The question with the three options exists in the **Schedule on the computer**. When you cancel from the **Jobs** screen or from the office schedule on the phone, the path is simpler:

- The box **Charge the fee** appears (with the amount), and only when the fee for that reason is set.
- With the box ticked, an invoice is created as a **draft**. You review and send it later, in Invoices.

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If something does not go as expected

? The option to charge the card does not show.

WHAT TO DO

1. The client has no saved card. Ask them to save one, or send the invoice.
2. The company does not take payments through Stripe, or the Stripe account is not ready to charge yet.

? The notice "the card was NOT charged" appeared.

WHAT TO DO

1. The visit was cancelled and the invoice was created, but the bank declined the card or the charge failed.
2. Open **Invoices**, find the invoice by the number in the notice and collect from there: another card, or send it for the client to pay by the link.

? The notice that the client has no email appeared.

WHAT TO DO

1. The invoice is ready, but there was nowhere to send it. Open the invoice in **Invoices**, copy the link and send it by text.
2. Then add the email to the client profile.

? The question "Are you charging for this visit?" did not appear.

WHAT TO DO

1. The reason chosen is not on the client (company, weather or other). There is no charge for those.
2. You are cancelling from another screen. The question exists in the Schedule on the computer.

? The amount came different from what I expected.

WHAT TO DO

1. With the fee set, the fee comes. With no fee, the full price of the visit comes.
2. Check the amounts in **Settings > Operations**. And remember: you can change the number on each cancellation.

? I charged by mistake.

WHAT TO DO

1. Open the invoice in **Invoices**. A payment is refunded from there.