

Refund Example - Family Paid Fees With Credit Card and is Eligible for a Partial Refund

Last Modified on 11/03/2020 12:32 am EST

- Family paid a tuition fee of \$150.00 and a registration fee of \$35 with their Visa. They have withdrawn from class and are eligible for a partial refund.
- They have a 0.00 current balance.
- The tuition fee of \$150.00 will be refunded back to their Visa.
- The family balance will not change.

Make Sale/Post Fees Payment Refund Statement Add Student Add Contact Archive Family Family Name Email Email Schedules Merge Family

Summary Contacts Classes Events **Transactions** Billing Info Misc

View Transaction History View Unapplied Credits & Unpaid Fees

Current Balance 0.00

Legend: Fee/Charge Payment/Credit Unpaid Fee Unapplied Credit

Last 20 (Most Recent) Transactions

View 1 - 3 of 3

Print Refresh 6 columns hidden Show/Hide Columns Save Columns Restore Columns

		Date	Type	Amt	Unpaid Amt	Balance	Note	Pmt Meth	ePmt	Date Paid	Cat1	Sess	Student	Class/Event		
				12/1/2016	Payment	-185.00	0.00	0.00		Visa		12/1/2016				
				12/1/2016	Tuition Fee	150.00	0.00	185.00		Visa		12/1/2016	Dance	Fall 2016	Dianne Ager	Int Jazz - Mo - 8pm
				11/22/2016	Registration	35.00	0.00	35.00		Visa		12/1/2016	Registration Fee		Dianne Ager	

Current Balance 0.00

1. Click the **R** on the payment line.
2. The *Post Date* and *Refund Method* are pre-filled and cannot be edited for an ePayment refund (refund to card).
3. Optionally add a **Note**.
4. Check the **Tuition Fee** and leave the *Refund Amt* at 150.00. *Note: If you were refunding a partial amount, you'd change the Refund Amt field.* Because the registration fee is not being refunded, leave it unchecked.
5. Click **Next**.
6. Because the tuition fee is no longer owing click **Not Due** in the *Are Fees Still Due?* window. *Note: The registration fee will be grayed out here because it was not selected to be refunded.*
7. Click **Submit Refund**. A confirmation of the transaction will appear with an approval code or decline code.

Refund Transaction

Original Amount : 185.00
Date : 12/01/2016 Method : Visa (ePayment) Settled with Processor : Yes

Refund Card Ending In: 8886

Post Date: 12/15/2016

Refund Method: * Visa Refund by Different Payment Method

Note: Withdrew from class - eligible for tuition refund

The fees below are linked to this payment. Select which fee(s) to refund. To partially refund fees, edit the refund amount.

☐ Check All Rows ☐ Uncheck All Rows

Date	Type	Cat1	Sub Type	Class/Event	Student	Refund Amt	Fee Amt	Amt Pd	Prior Refund	UserID
12/1/2016	Tuition Fee	Dance	Dec	Int Jazz - Mon - 8pm	Dianne Ager	150.00	150.00	150.00	0.00	HCenter
11/22/2016	Registration	Registration Fee			Dianne Ager	0.00	35.00	35.00	0.00	HCenter

Refund Total: 150.00

On the Family's *Transactions* tab ...

- A *Refund - Tuition Fee* transaction has been added for \$150.00 and is linked to the original payment and the original fee.
- A *Refund Adjustment* has been added so that the family's balance is correct. It is linked to the refund transaction.
- The family balance does not change.
- The refund transaction ID and status are available in the ePmt column.
- The **R** icon is still visible for the payment because it has not been completely refunded.

Make Sale/Post Fees Payment Refund Statement Add Student Add Contact Archive Family Family Name Email Email Schedules Merge Family

Summary Contacts Classes Events **Transactions** Billing Info Misc

View Transaction History View Unapplied Credits & Unpaid Fees

Current Balance 0.00

Last 20 (Most Recent) Transactions

View 1 - 5 of 5 Print Refresh 6 columns hidden Show/Hide Columns Restore Columns

	Date	Type	Amt	Unpaid Amt	Balance	Note	Pmt Meth	ePmt
	12/15/2016	Refund - Tuition Fee	150.00	0.00	0.00	Withdrew from class - eligible for tuition refund	Visa	✓
	12/15/2016	Refund Adjustment	-150.00	0.00	-150.00	Withdrew from class - eligible for tuition refund	Visa	✓
R	12/1/2016	Payment	-185.00	0.00	0.00	150.00 Refunded on 12/15/2016 by helpcenter.	Visa	✓
	12/1/2016	Tuition Fee	150.00	0.00	185.00		Visa	
	11/22/2016	Registration	35.00	0.00	35.00		Visa	

Current Balance 0.00

ePayment Details

✓ Refund - Approved

Payment Processor: SafeSave Payments
Response: SUCCESS
Trans ID: 3405695438
Approval Code: N/A
Type: Credit Card
Last 4: 8886
Name: Holly Ager
Location: JRHC