

Family Paid Early in Error (with Credit Card), the Fees are Still Due (Refund Example)

Last Modified on 03/08/2023 10:56 am EST

A family owes \$75.00 in March for a competition fee but paid that fee in error in December. They have a \$0.00 current balance. The entire amount will be refunded. The family still owes the fee in March, so the balance will increase to \$75.00.

Make Sale/Post Fees | Payment/Credit | Refund | Statement | Add Student | Add Contact | Archive Family | Family Name | Email | Push Notification | Email Schedule

Merge Family

Summary | Contacts | Classes | Events | **Transactions** | Billing Info | Misc | Notes (0) | Resources (0) | Policies (0)

View Transaction History | View Unapplied Credits & Unpaid Fees | Help ?

Current Balance **0.00**

Legend FEE/CHARGE PAYMENT/CREDIT UNPAID FEE UNAPPLIED CREDIT

Last 20 (Most Recent) Transactions

View 1 - 20 of 20 | 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
	3/6/2023	Competition Fee	75.00	0.00	0.00		MC		3/6/2023	Competition Fee		Amanda Farmer	
	12/6/2022	Payment	-75.00	0.00	-75.00		MC	✓	12/6/2022				

Process a Refund

- Click the **R** on the payment line.
 - The *Post Date* and *Refund Method* are pre-filled and cannot be edited for an ePayment refund (refund to card).
- Add a **Note** for reference.
- Check the **Competition Fee** and leave the amount at 75.00.
- Click **Next**.
- Click **Due** in the *Are Fees Still Due?* window because the family still owes the \$75.00 competition fee.
- Click **Submit Refund**.

Family Transaction Tab View

- A *Refund - Overpayment* has been added and is linked to the original payment.
- The family balance is increased to \$75.00.
- The **R** icon is no longer visible for the payment because it has been completely refunded.
- The competition fee is unlinked and still owed.

Make Sale/Post Fees | Payment/Credit | Refund | Statement | Add Student | Add Contact | Archive Family | Family Name | Email | Push Notification | Email Schedules | Submit Absences | Merge Family

Summary | Contacts | Classes | Events | **Transactions** | Billing Info | Misc | Notes (0) | Resources (0) | Policies (5)

View Transaction History | View Unapplied Credits & Unpaid Fees | Help ?

Current Balance **75.00**

Last 20 (Most Recent) Transactions

View 1 - 20 of 20 | Print | Refresh | 6 columns hidden | Show/Hide Columns | Restore Columns

	Date	Type	Amt	Unpaid Amt	Balance	Note	Pmt Meth	ePmt	Date Paid	Cat1	Sess	Student	Class/Event
	3/7/2023	Refund - Overpayment	75.00	0.00	75.00	paid early in error -will pay in March. Unlinked/Adj. fees - Competition Fee 75.	MC	✓	3/7/2023				
	3/6/2023	Competition Fee	75.00	75.00	0.00		MC			Competition Fee		Amanda Farmer	
	12/6/2022	Payment	-75.00	0.00	-75.00	75.00 Refunded on 03/07/2023 by HBarnhardt.	MC	✓	12/6/2022				

Click here to see refund transaction details.

