

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

Last Modified on 03/08/2023 10:50 am EST

A family paid a tuition fee of \$150.00 and a registration fee of \$35 with their Discover card. They have withdrawn from the class and are eligible for a partial refund.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 Discover card. The family balance will not change.

Make Sale/Post Fees		Payment/Credit	Refund	Statement	Add Student	Add Contact	Archive Family	Family Name	Email	Push Notification	Email Schedules	Submit A			
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 <input type="checkbox"/> FEE/CHARGE <input type="checkbox"/> PAYMENT/CREDIT <input type="checkbox"/> UNPAID FEE <input type="checkbox"/> UNAPPLIED CREDIT															
Last 20 (Most Recent) Transactions															
View 1 - 20 of 20 <input type="button" value="Print"/> <input type="button" value="Refresh"/> 6 columns hidden <input type="button" value="Show/Hide Columns"/> <input type="button" value="Restore Columns"/>															
		Date	Type	Amt	Unpaid Amt	Balance	Note	Pmt Meth	ePmt	Date Paid	Cat1	Sess	Student	Class/Ev	
				3/6/2023	Payment	-185.00	0.00	0.00		Discover	<input checked="" type="checkbox"/>	3/6/2023			
				3/1/2023	Tuition Fee	150.00	0.00	185.00		Discover		3/6/2023	Tuition Fee	2022-2023	Lee Burgess
				2/9/2023	Registration	35.00	0.00	35.00		Discover		3/6/2023	Registration Fee		Lee Burgess

Process a Refund

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**.

Refund Transaction

Original Amount : 185.00
 Date : 03/06/2023 Method : Discover (ePayment) Settled with Processor : Yes

Refund Card Ending In: 2939

Post Date:

Refund Method: *

Note:

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
<input checked="" type="checkbox"/>	<input type="checkbox"/>	3/1/2023	Tuition Fee	Tuition Fee			Lee Burgess	<input type="text" value="150.00"/>	150.00	150.00	0.00	HBarnhardt
<input type="checkbox"/>	<input type="checkbox"/>	2/9/2023	Registration	Registration Fee			Lee Burgess	<input type="text" value="0.00"/>	35.00	35.00	0.00	HBarnhardt

Refund Total: 150.00

6. Click **Not Due** in the *Are Fees Still Due?* window because the tuition fee is no longer owed. **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 or decline code.

Family Transaction Tab View

- 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/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 (0)

View Transaction History | View Unapplied Credits & Unpaid Fees

Current Balance **0.00**

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	D
			3/7/2023	Refund - Tuition Fee	150.00	0.00	0.00	Withdrew from class - eligible for tuition refund	Discover		8
			3/7/2023	Refund Adjustment	-150.00	0.00	-150.00	Withdrew from class - eligible for tuition refund	Discover		8
			3/6/2023	Payment	-185.00	0.00	0.00	150.00 Refunded on 03/07/2023 by HBarnhardt.	Discover		8
			3/1/2023	Tuition Fee	150.00	0.00	185.00		Discover		3/6/2023
			2/9/2023	Registration	35.00	0.00	35.00		Discover		3/6/2023

Refund Approved

Payment Processor: SafeSave Payments
 Response: Success
 Trans ID: 8129296780
 Approval Code:
 Type: Credit Card
 Last 4: 2929
 Name: Brad Burgess
 Location: E Dojo

[Close](#)