

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

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- Family owes \$75.00 in February but paid that fee by error in November.
- They have a \$0 balance.
- The entire amount will be refunded.
- The family still owes the fee in February, so the balance will increase to \$75.00.

The screenshot shows a software interface with a top navigation bar containing tabs like 'Make Sale/Post Fees', 'Payment', 'Refund', 'Statement', 'Add Student', 'Add Contact', 'Archive Family', 'Family Name', 'Email', 'Email Schedules', and 'Merge Family'. Below this is a secondary navigation bar with 'Summary', 'Contacts', 'Classes', 'Events', 'Transactions' (highlighted), 'Billing Info', and 'Misc'. A 'Current Balance 0.00' is displayed in a yellow box. A legend indicates 'Fee/Charge' (grey), 'Payment/Credit' (green), 'Unpaid Fee' (red), and 'Unapplied Credit' (blue). The main section is titled 'Last 20 (Most Recent) Transactions' and includes a table with columns: Date, Type, Amt, Unpaid Amt, Balance, Note, Pmt Meth, ePmt, Date Paid, Cat1, Sess, Student, and Class/. The table shows two rows: a 'Competition Fee' of 75.00 on 2/1/2017 and a 'Payment' of -75.00 on 11/17/2016. A blue 'R' button is highlighted on the payment row, with a mouse cursor pointing to it.

Date	Type	Amt	Unpaid Amt	Balance	Note	Pmt Meth	ePmt	Date Paid	Cat1	Sess	Student	Class/
2/1/2017	Competition Fee	75.00	0.00	0.00		Visa		11/17/2016	Dance		Shannon Andrews	
11/17/2016	Payment	-75.00	0.00	-75.00		Visa	✓	11/17/2016				

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. Add a **Note** for reference.
4. Check the **Competition Fee** and leave the amount at 75.00.
5. Click **Next**.
6. Because the family still owes the \$75.00 competition fee, click **Due** in the *Are Fees Still Due?* window.
7. Click **Submit Refund**.

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

- 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 | 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 | Help ?

Current Balance 75.00 | Legend: Fee/Charge | Payment/Credit | Unpaid Fee | Unapplied Credit

Last 20 (Most Recent) Transactions

View 1 - 12 of 12 | 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	C
			2/1/2017	Competition Fee	75.00	75.00	75.00		Visa			Dance		Shannon Andrews	
			12/15/2016	Refund - Overpayment	75.00	0.00	0.00	pd early in error - will pay in February, Unlinked/Adj. Fees Dance-Competition Fee 75	Visa		12/15/2016				
			11/17/2016	Payment	-75.00	0.00	-75.00	75.00 Refunded on 12/15/2016 by helpcenter.	Visa		11/17/2016				

Click here to see refund transaction details.