

Void a Credit Card Payment that Hasn't Settled with the Processor

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If you can catch an error before your transactions are batched out from your gateway account (daily) and sent to your merchant processor for settlement, you will be able to void the transaction as opposed to having to refund it. The benefit with this is that no charge will hit your client's credit card. See [Set a Settlement Schedule](#) in ePayment Settings for more information on batch settlement schedules.



In some cases the card issuing bank may place a hold on funds when the credit card is charged. A void does NOT remove that hold, it simply stops the charge from processing. The hold typically will drop off after a couple of days.

1. Be sure you are viewing the correct family's *Transactions* tab, and locate the payment that you want to void. (You may need to click **View Transaction History**.)
2. Click the **R** icon on the payment line.
3. If the payment has not yet settled with the merchant processor, the *Void Transaction* pop-up box will open and you'll notice two options.

Void Transaction

This payment hasn't settled with your e-commerce processor. It will be un-linked from the fee and voided. What should happen to the Payment transaction?

Send void receipt

- Click **Void & Change Payment Amount to \$0** to unlink the payment from

the fee(s) and change the payment amount to \$0. Using this option allows you to maintain a record of the payment being voided. This will change the payment amount to \$0 and add a note regarding the payment change. The balance will also be adjusted so that the family owes the voided amount. Check **Send void receipt** to send a receipt of the voided transaction to the email associated with the credit card.

The screenshot shows the 'Transactions' tab in the software. The 'Last 20 (Most Recent) Transactions' table is visible. The first row shows a payment of 0.00 on 12/30/2015, with a note: 'Transaction voided and payment amount changed to 0.' The 'ePmt' column for this row has a 'Void' button highlighted. A callout box titled 'ePayment Details' shows a green checkmark and 'Void - Approved' status. A yellow callout bubble points to the 'Void' button with the text 'Click to see details'.

Date	Type	Sub Type	Amt	Orig Amt	Disc Amt	Pre-tax Amt	Tax	Unpaid Amt	Balance	Note	Pmt Meth	ePmt	Date Paid	Cat1	Sess	Student
12/30/2015	Payment		0.00			0.00		0.00	90.00	Transaction voided and payment amount changed to 0.	Visa	Void	12/30/2015			
12/14/2015	Registration Fee		25.00	25.00		25.00		25.00	90.00						Winter 2015	Ethan Gray
12/14/2015	Tuition Fee		65.00	65.00		65.00		65.00	65.00						Winter 2015	Ethan Gray

- Click **Void & Delete Payment** if you want to completely delete the payment line from the family's transactions. This will completely remove the payment from the family's transaction history. The balance will also be adjusted so that the family owes the voided amount. Check **Send void receipt** to send a receipt of the voided transaction to the email associated with the credit card.

The screenshot shows the 'Transactions' tab after the payment line has been deleted. The 'Last 20 (Most Recent) Transactions' table now only shows the two previous transactions. A yellow callout bubble points to the first row with the text 'Payment line has been deleted completely'. A legend at the top right indicates: Legend: Fee/Charge Payment/Credit Unpaid Fee Unapplied Credit.

Date	Type	Sub Type	Amt	Orig Amt	Disc Amt	Pre-tax Amt	Tax	Unpaid Amt	Balance	Note	Pmt Meth	ePmt	Date Paid	Cat1	Sess	Student
12/14/2015	Registration Fee		25.00	25.00		25.00		25.00	90.00						Winter 2015	Ethan Gray
12/14/2015	Tuition Fee		65.00	65.00		65.00		65.00	65.00						Winter 2015	Ethan Gray