

# REFUNDS

A refund is usually created when a family is leaving and their account is in credit.

Do not create a refund if the family owes you money.

**NOTE:** Once this has been created it cannot be removed by yourself. If you have created one by accident, please contact the support desk via email for further assistance.

This tipsheet will walk you through:

- Create a refund
- Viewing and Searching for refunds
- Troubleshooting

## Summary

1. Click on Accounts
2. Click on Refunds
3. Click on Create New Refund button
  - a. Select Contact
  - b. Can change refund date
  - c. Enter amount
  - d. If you wish enter a comment
  - e. Click Submit

# REFUNDS

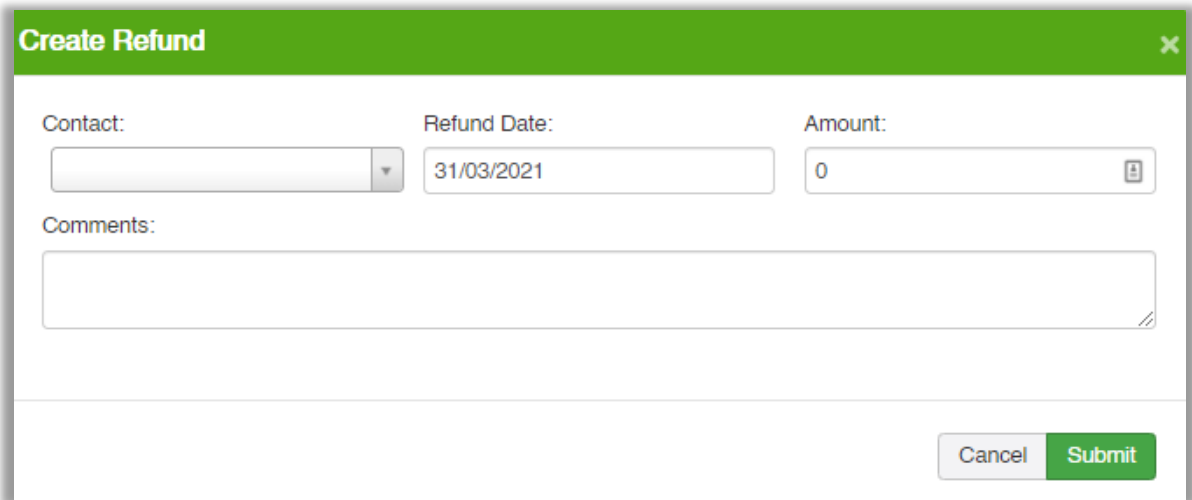
## Detailed

### [Create a new Refund](#)

Click Accounts menu and select Refunds



Click the Create New Refund button and the following window will be displayed:

A screenshot of the "Create Refund" form. The form has a green header with the title "Create Refund" and a close button (X). Below the header, there are three input fields: "Contact:" (a dropdown menu), "Refund Date:" (a text box containing "31/03/2021"), and "Amount:" (a text box containing "0" with a lock icon). Below these fields is a "Comments:" section with a large text area. At the bottom right of the form, there are two buttons: "Cancel" and "Submit".

You must select a **Contact**, **Refund Date** (select a date from the calendar) and enter a refund **Amount** before you can select the **Save** button to save the refund details.

**NOTE: The refund "Amount" you enter must be greater \$0.00**

You can enter a comment in the **Description** field to remind you why the refund was made.

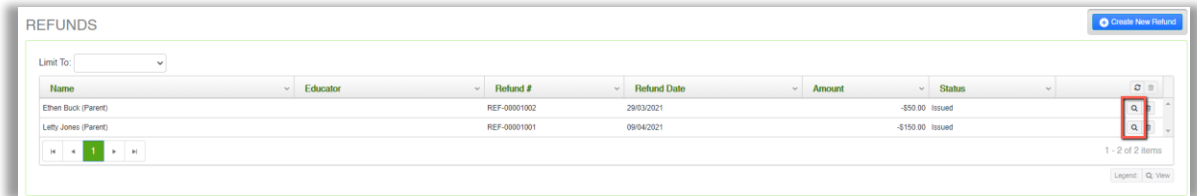
Once you have entered the details, click the **Save** button to save the refund details.

# Detailed cont.

## Searching and viewing refunds

### Viewing

From the list of refunds, click the  **View** button for the refund:



A window will be displayed containing the refund details.

**Refund REF-00001001** ✕

Contact:	Refund Date:	Amount:
<input type="text" value="Letty Jones"/>	<input type="text" value="09/04/2021"/>	<input type="text" value="-150"/>
Comments:		
<input style="width: 100%;" type="text" value="family has left, refunding credit."/>		
<input type="button" value="Cancel"/>		

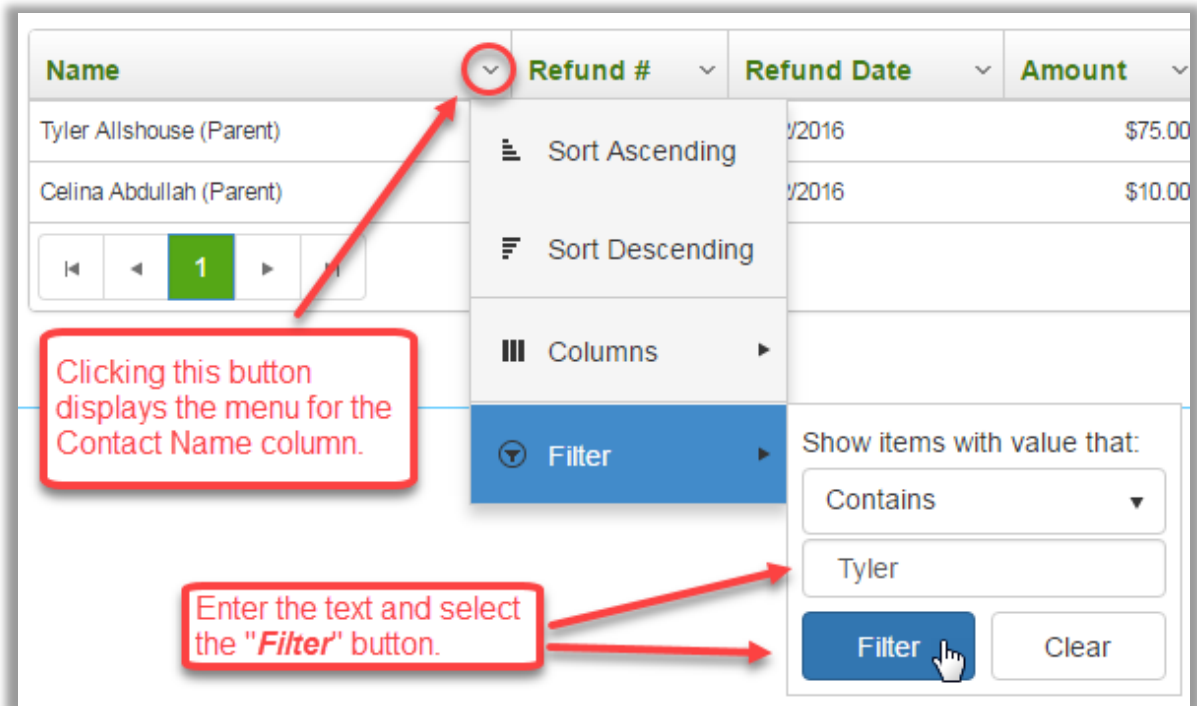
### Searching

The list of refunds may become long; however, apart from browsing through the list, you can change the view so you only see the refunds that you are interested in by applying one or more filters.

For example, to see all the refunds with the word “Tyler” in their Contact Name:

Click on the  **Down Arrow** button in the **Contact Name** column header.

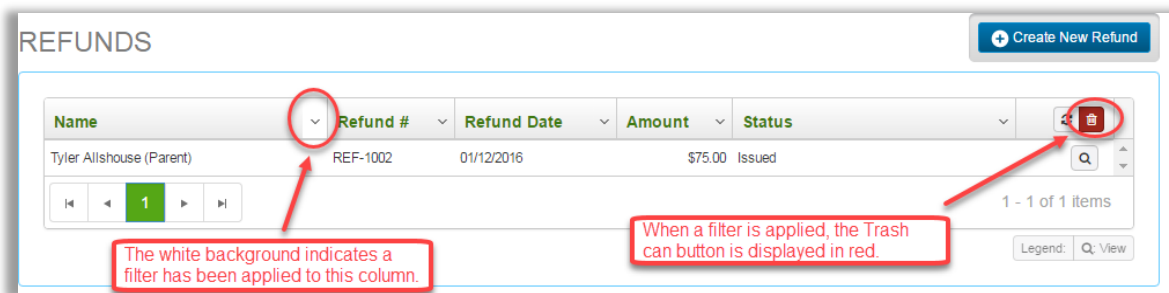
Click on **Filter** to display the filter details



Select Contains from the list of filter options.

Enter the text "Tyler" (it doesn't matter if you enter the text in upper, lower, or mixed case).

Click on the **Filter** button to display the records that match the filter.



The filters are remembered, which means if you close the window, the next time you open the Refunds window the filters will still be applied to the list of refunds.

To clear the filters, you will need to click the  button to clear all filters from the menu headings.

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## Troubleshooting

**Issue:** I have created a refund for the wrong amount.

**Resolution:** The refund needs to be removed, however refunds cannot be removed by your service. Please contact the help desk via email to have the refund removed. Once removed you will be able to create a new refund for the correct amount.

**Issue:** The refund I created has put the parent further into debt.

**Why?** Within the software refunds were designed to take money off the account, therefore we see this happens in 2 situations:

1. The refund amount was more than the credit amount
2. The parent was already owing money

**Resolution:** The refund needs to be removed; however refunds cannot be removed by your service. Please contact the help desk via email to have the refund removed. Once removed you will be able to create a new refund for the correct amount.

**Issue:** The refund isn't showing on the parent account

**Why?** When creating the refund, you may have accidentally selected a contact instead of parent.

**Resolution:** The refund needs to be removed; however refunds cannot be removed by your service. Please contact the help desk via email to have the refund removed. Once removed you will be able to create a new refund for the correct amount.