

Issuing Refunds with Stripe

Any refunds and checkin reversals are recorded as a new transaction that has a negative value. You will see references to the opposing transactions in reports and logs.

If you issue a refund on a date after the original purchase, the refund amount will show on the daily report for the date the refund was issued. For example is a patient buys herbs on a Monday, and returns them for a refund on a Tuesday, the refund will show on Tuesday's Transaction report.

Issuing a checkin refund:

To issue a refund of a checkin, simply reverse the checkin. This will automatically refund the credit card used at checkin.

Reverse Check-In

☒ Check Out This Appointment?

Reversing this appointment checkin will also remove the payment transaction.

[1018] Transaction
February 16, 2023, 8:12 am

| ID | Description | Amt |
|------|-----------------------|---------|
| 2015 | acupuncture Treatment | \$20.00 |
| 2016 | Amount Paid | (20.00) |
| Paid | | \$20.00 |

Payment Method: visa ***9969

Print Appointment

Remove Checkin/Refund

Add a Note...

Save Note

Issuing a purchase transaction refund:

You can issue a refund of a Purchase Transaction in two ways: via the Transactions list on the schedule or via the Transactions report.

Via Transactions list on the schedule:

Click the Transactions list at the bottom of the navigation menu on the left hand side of the schedule page. Purchase Transactions will be in yellow. Simply click the refund button to issue a refund back to the patient’s credit card:

For February 16, 2023

[1021] Thu Feb 16, 2023
Domino Dalmatian
W/ Alexa Hulsey At Main Street @ 8:21 am
REFUND : visa ***9969 \$-20.00
📝 🖨️ REFUND INV 1018

[1020] Thu Feb 16, 2023
Tinker D Bell
W/ Alexa Hulsey At Main Street @ 8:19 am
PAID: visa ***1881 \$20.00
📝 🖨️

[1019] Thu Feb 16, 2023
Domino Dalmatian
At Main Street
PAID: \$40.00
📝 🖨️ **REFUND**

Via the Transactions report:

When you run a Transactions report, you’ll see a Refund button option for any Purchase Transactions. Simply click the refund button to issue a refund back to the patient’s credit card:

Transactions for appointments show date and time

Refund

 only for non-treatment transactions.

| INVID | APTID | TRXN Date | Patient | Prac | Loc | Method | Note | Other Desc | Other | Treat | (Credit) | Total |
|-------|------------------------|------------------|------------------|--------------|-------------|--------------|---|------------|----------|----------|----------|-----------|
| 1021 | 🔗 1246 | Thu Feb 16, 2023 | Domino Dalmatian | Alexa Hulsey | Main Street | visa ***9969 | Refund Of 1018 | Refunded | \$ 0.00 | \$ 0.00 | \$0.00 | \$ -20.00 |
| 1020 | 🔗 1249 | Thu Feb 16, 2023 | Tinker D Bell | Alexa Hulsey | Main Street | visa ***1881 | CNCL: Feb 16 2023 10:10 am w Alexa Hulsey | No Show | \$ 0.00 | \$ 20.00 | \$0.00 | \$ 20.00 |
| 1019 | - | Thu Feb 16, 2023 | Domino Dalmatian | | Main Street | *** | REFUND | Herbs | \$ 40.00 | \$ 0.00 | \$0.00 | \$ 40.00 |
| 1018 | 🔗 1246 | Thu Feb 16, 2023 | Domino Dalmatian | Alexa Hulsey | Main Street | visa ***9969 | REFUNDED : 1021 | | \$ 0.00 | \$ 20.00 | \$0.00 | \$ 20.00 |
| 1017 | 🔗 1244 | Mon Feb 13, 2023 | Joe D Smith | Alexa Hulsey | Main Street | visa ***9969 | | | \$ 0.00 | \$ 38.50 | \$0.00 | \$ 38.50 |

Revision #2

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