Issuing Refunds with Stripe

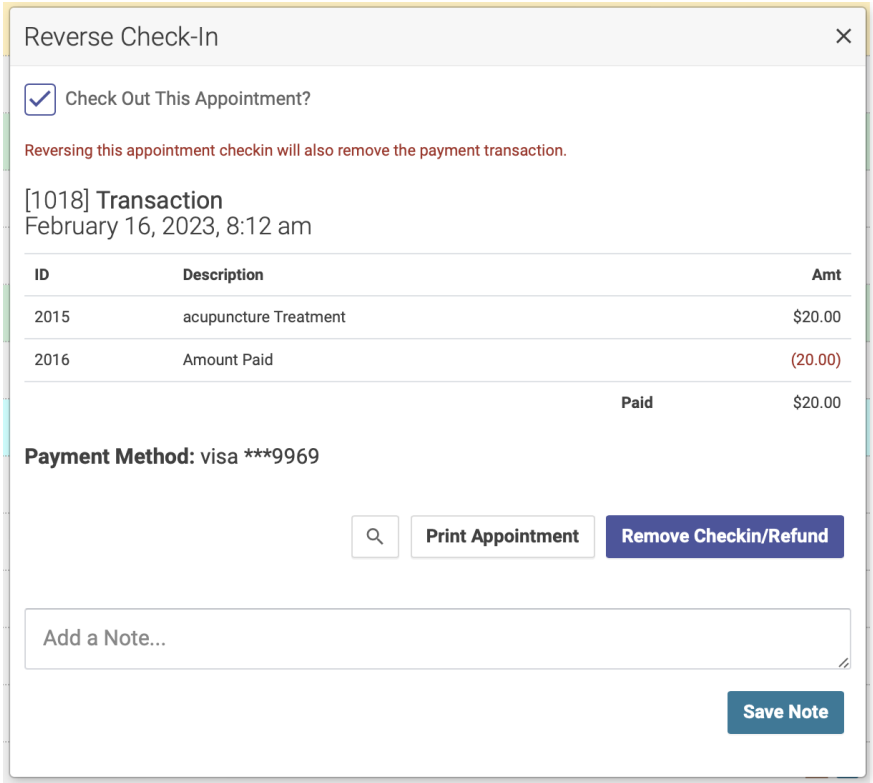
https://player.vimeo.com/video/801988433?title=0&byline=0

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.

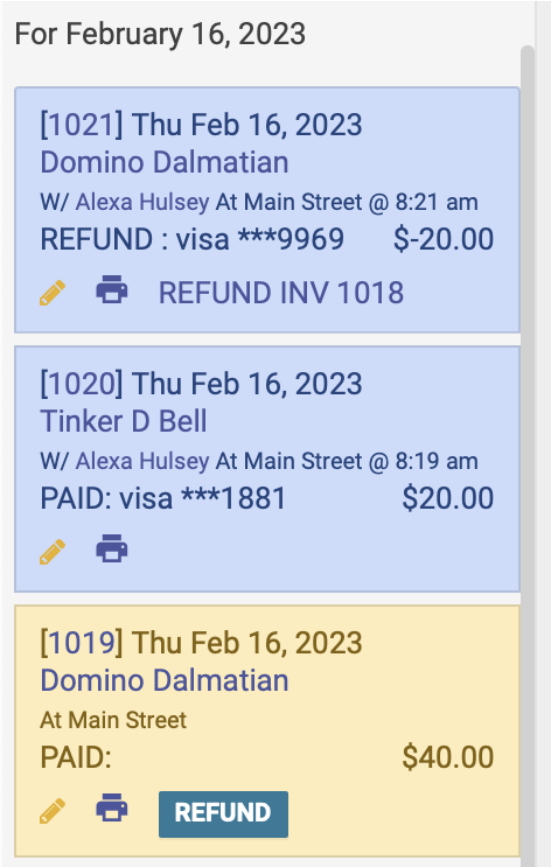


Issuing a purchase transaction refund:

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

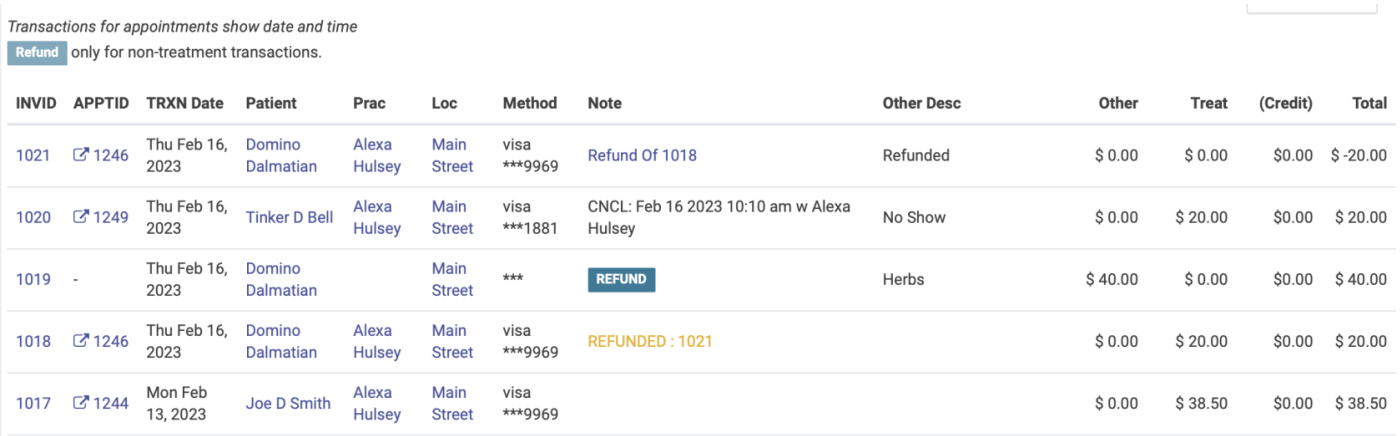
Via Transactions list on the schedule:

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:



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	APPTID	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
Created 2023-02-16 14:50:51 UTC by Alexa Hulsey
Updated 2024-07-19 14:49:54 UTC by Alexa Hulsey