



Issue and Notate a Partial Refund

Wherever possible, issue refunds on the registration in RegWerks. To issue a refund for an ePayment without cancelling a registrant out of a class, the user must have the necessary user permissions in both the RevTrak Portal and RegWerks. Users who do not have access must reach out to a Super User in their school to obtain user credentials.

For any other assistance, please contact RegWerks Support at 888-847-9470 or support@regwerks.zendesk.com.

1. In RegWerks, go to the **Person** menu option under the **Main** menu. Search for the last name of the registrant whose registration will receive the refund.

Person			
ID	Name	Age	Email
<input type="text"/>	<input type="text" value="nguyen"/>	<input type="text"/>	<input type="text"/>
4243690	Nguyen, Ann	0	nguyen@test.com
4243691	Nguyen, Mai	0	nguyen@test.com
4383564	Nguyen, Thanh	12	nguyen@test.com

2. Next, begin the process of identifying the Account Holder by double-clicking into the Person Profile.

[4243690] Person

Pre, First, Last, Suffix:

Email:

Address:

City, State, Zip:

Birthdate, Age, Grade:

Male Female

Suspend Account Suspend Parent Portal

Registrations Phones Emergency Remarks Payments Account Register Pickup

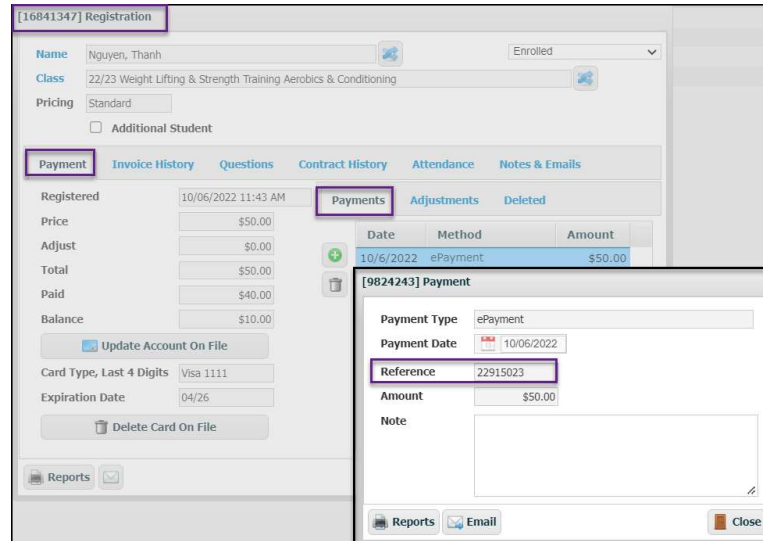
Registrations For:

Date	Title	Ref.	Balance
	Nguyen Ann		
	Nguyen Mai		
	Nguyen Thanh		

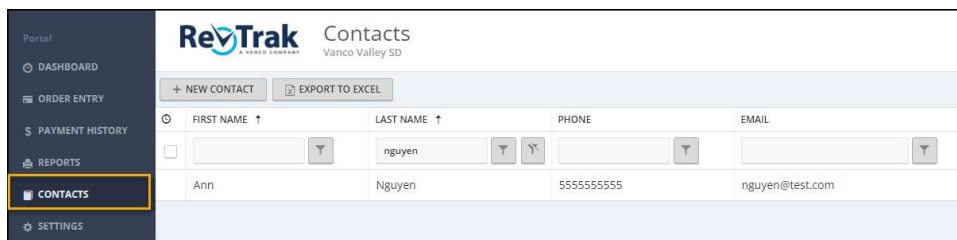
Reports Cancel Save

- A series of numbers in the **RT Cust ID** field confirms that this is the Account Holder. Proceed to the next step.
- A 0 in the **RT Cust ID** field indicates that the individual is not the Account Holder. Click on the **Registrations For** drop-down menu. Note the names. Exit out of the Person Profile.

- In Person under the Main Menu, look-up and review each of the other people in the family group to identify the Account Holder. Make note of the Account Holder's name *and* email address for use later in this process.
- Double-click into the registration that will receive the refund. Click into the payment that is to be partially refunded and write down the Reference number.



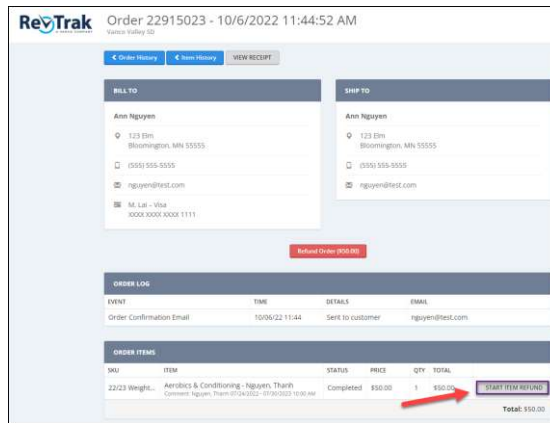
3. In a new browser tab, go to your **RevTrak Portal** (*schoolcodename.revtrak.net/portal*) and log in. (e.g., RegWerks URL: *abcschool.facilitywerks.com/admin/* and RevTrak Portal URL: *abcschool.revtrak.net/portal*)
4. Click on the **Contacts** button and search for the Account Holder's *last name*.



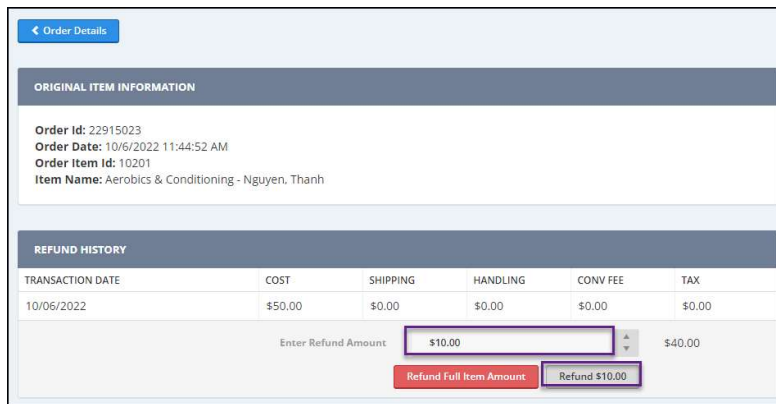
5. Confirm that both the name and the email on the account are correct. Then double-click into the Account Holder's account. Click on the **Orders Placed** tab, then click on the **Order** number that corresponds to the epayment's reference number, noted in Step #4 above.

Contact Details	ORDER	DATE	AMOUNT	SHIPPING	HANDLING	TAX	SERVICE FEE	TOTAL
Web Store	22915023	10/06/22	\$50.00	\$0.00	\$0.00	\$0.00	\$0.00	\$50.00
Import Type	22915022	10/06/22	(\$25.00)	\$0.00	\$0.00	\$0.00	\$0.00	(\$25.00)
	22915021	10/06/22	(\$25.00)	\$0.00	\$0.00	\$0.00	\$0.00	(\$25.00)
Orders Placed	22915020	09/15/22	\$25.00	\$0.00	\$0.00	\$0.00	\$0.00	\$25.00
	22915019	09/15/22	\$25.00	\$0.00	\$0.00	\$0.00	\$0.00	\$25.00

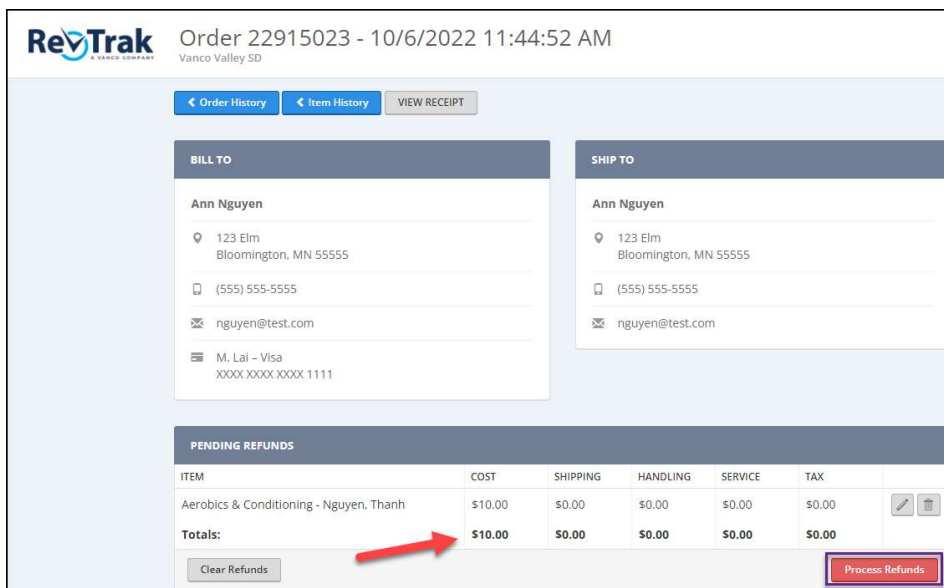
- There are two options on the receipt page: Refund Order to refund the full amount; or **Start Item Refund**. To complete a partial refund, select **Start Item Refund**.



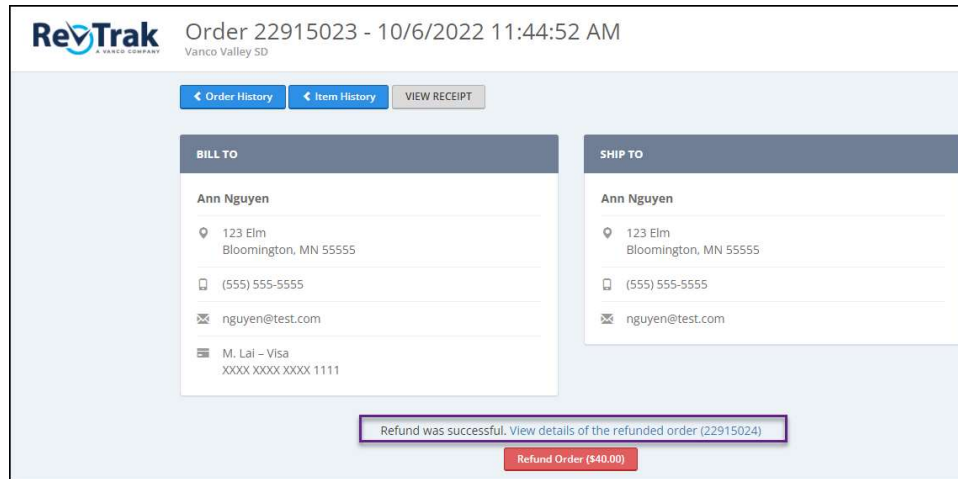
- Add the refund amount in the **Enter Refund Amount** field. Select **Refund \$xx.xx** (e.g., \$10.00).



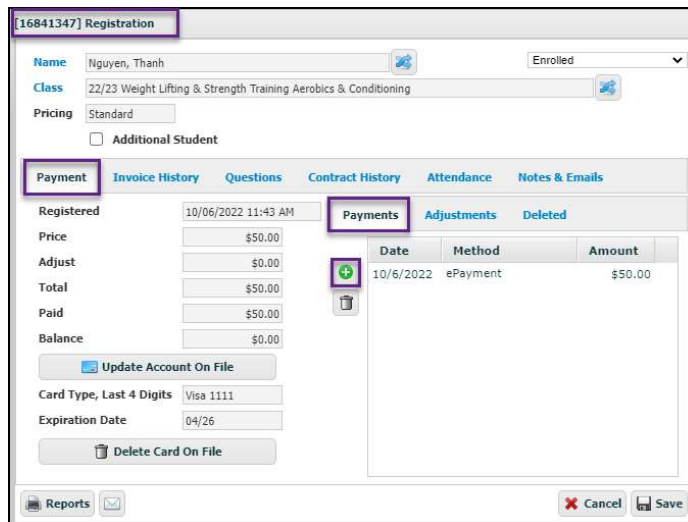
- On the next screen, verify that the refund amount is correct before clicking the **Process Refunds** button.



9. Once the refund is complete, note the refund's **Order Number** appearing in the message, **Refund was successful. View details of the refunded order (123456789)**, located in the center of the page.

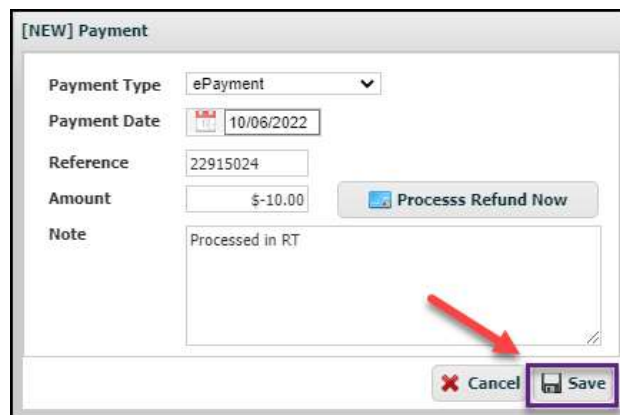


10. Return to RegWerks. Navigate to the **Registration** that is being refunded. In **Payments**, click on the green plus sign to begin notating the refund:



11. Notate the details of the refund, including:

- **ePayment** as the payment type in the **Payment Type**.
- **Payment Date**
- **Order Number** in the **Reference** field
- Negative amount of the refund in the **Amount** field (e.g., -\$10.00).
- Internal notes explaining the reason for the refund may be added in the **Note** field.
- Click **Save**.



[NEW] Payment

Payment Type: ePayment

Payment Date: 10/06/2022

Reference: 22915024

Amount: \$-10.00

Note: Processed in RT

Process Refund Now

Cancel Save

12. Go to the **Adjustments** tab, and click the **Add** button (). Enter a negative adjustment.



[NEW] Adjustment

Date: 10/06/2022

Amount: \$-10.00

Reason: Scholarship.

Show On Invoice

Cancel Save

- Enter the amount of the refund in the **Amount** field (e.g., -\$10.00).
- Enter the reason for the refund in the **Reason** field.
- Check **Show on Invoice** for contract classes, where appropriate.
- Click **Save**, and then save out of the registration to sync the system.