

# Refunds

23/10/2024 9:54 am BST

The Refunds screen allows you to refund transactions on a client's account.

## Details

To perform a refund, enter the Accounts Screen and select the 'Refunds' button.

The Discounts Screen consists of two tabs: 'List Items for Refund' and 'Monetary Refund'.

Accounts [User - jupiter : Site - Esher : Profile - Back Reception ]

List All

Payments

Refunds

Discounts

Credits

Return Money

Surcharges

Notes

HCP Accounts

Statements

Clear

List Items for refund

Monetary Refund

Refund Date

Refund Amount

Note: These are items that have had payment(s) allocated against them.

Refund Money

Cancel

29/07/2024

0

Refund	Date	Invoice No	Description	Surgeon	Patient	Qty	Net	VAT	Total	Discount/Credit	Am
	25/07/2024 12:16	1015462	IVFT	T Pointer (TP...	Dog	1.00	29.17	5.83	35.00	0.00	35.0

## List Items tab

This screen is used to refund specific items.

List Items for refund

Monetary Refund

Refund Date

Refund Amount

Note: These are items that have had payment(s) allocated against them.

Refund Money

Cancel

29/07/2024

0

Refund	Date	Invoice No	Description	Surgeon	Patient	Qty	Net	VAT	Total	Discount/Cred
	25/07/2024 12:16	1015462	IVFT	T Pointer (TP...	Dog	1.00	29.17	5.83	35.00	0.00
	25/07/2024 12:16	1015462	Metacam Inj Dogs/cats 5m...	T Pointer (TP...	Dog	1.00	9.40	1.88	11.28	0.00
	25/07/2024 12:16	1015462	Injection fee	T Pointer (TP...	Dog	1.00	4.17	0.83	5.00	0.00
	25/07/2024 12:53	1015463	Castrate Dog	T Pointer (TP...	Bella	1.00	500.00	100.00	600.00	0.00
	25/07/2024 12:53	1015463	Metacam Inj Dogs/cats 5m...	T Pointer (TP...	Bella	1.00	9.40	1.88	11.28	0.00
	25/07/2024 12:53	1015463	Injection fee	T Pointer (TP...	Bella	1.00	4.17	0.83	5.00	0.00
	25/07/2024 12:53	1015463	Dog Health Check & Vaccl...	T Pointer (TP...	Bella	1.00	50.00	10.00	60.00	0.00

## Refund an item

In the 'Refund' column for the item you wish to refund type the **quantity being returned**.

- To proceed with the refund select '**Return Money**'.
- Select the **payment method** used to refund the Client.

Refund Confirmation - IVFT

Refund Date

29/07/2024

Payment Method

Credit Card

OK

Cancel

3. If the item is a stock item, you will be prompted to return the item to stock or not. If selecting 'Yes', select which Stock Centre you are returning stock to (if you only have one stock centre, this option will not display).
4. The refund transactions will display in the Accounts Screen. The first transaction shows the account being credited, the second transaction shows the credit being refunded to the

## Monetary Refund tab

Monetary Discounts are used to refund a User-defined amount.

Ins	Invoice Date	Invoice No	Payment ID	Item Date	Description	Surg...	Receipts	Qty	Net	VAT	Total	Running...	Patient	Site	Type	User	Modified
✓	26/07/2024	184449	184449	26/07/2024 15:19	Credit - credit overpaid (jupiter)		0.00	0.00	-33.33	-6.67	-40.00	4,145.92	Es...	Cr...	jupiter	26/07/2024	
✗	26/07/2024	184450	184450	26/07/2024 15:53	Discount - discount (jupiter)		0.00	0.00	0.00	0.00	0.00	4,145.92	Es...	Di...	jupiter	26/07/2024	
✓	29/07/2024	0	184451	29/07/2024 10:39	Cash (lm)		50.69	0.00	0.00	0.00	0.00	4,095.23	Es...	Pa...	jupiter	29/07/2024	

## Refund a monetary amount

1. Select the **Date** and **Payment Method** you wish to refund via.
2. Enter a **Description** for the Refund and enter a **Total** of the refund.
3. Select '**Refund Payments**'.
4. The refund transaction will appear on the Client's account (unallocated).

09/10/2024	0	628086	09/10/2024 12:42	Debit Card return for User Return Payment...	-84.00	0.00
09/10/2024	628087	628087	09/10/2024 12:42	Credit (lorraine)	0.00	0.00