

Cancelling and Refunding a Transaction

Last Modified on 06/10/2016 11:31 am AEDT

Quick Steps: Go to Subscriptions > Transactions > Unpaid or Paid > Find the transaction > Cancel > Cancelled > Refund

1. Within the Management Console, select **Subscriptions** from the top menu, then **Transactions** from the left menu.
2. Select **Unpaid** or **Paid** from the expanded left menu.
3. Find the transaction that you wish to cancel in the Transactions listing. Use the **Search** function if you have more than one page of transactions.
4. Click **Cancel** next to the transaction you wish to cancel. Update the financial status to make this member unfinancial, and take the date back to the last date that the Member was financial.

9634306	05-Oct-2016	test 2, test 2		\$140.00	05-Oct-2016			
9635984	06-Oct-2016	B, Sam		\$140.00	06-Oct-2016			

Records: 1-5 of 5

Cancel Transaction

5. Complete the comments with the reason for cancelling, then click on **Submit**.

Transaction Cancellation

Member:	test 2 test 2
Title:	Family Registration for 2 Children
Details:	
Total:	\$265.00

Update Financial Status: Yes No

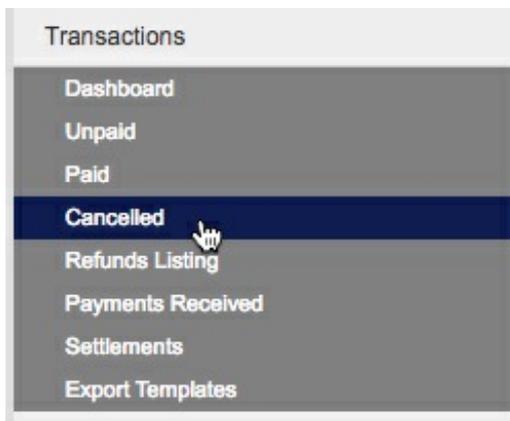
If Yes to above, then you have selected to make this member unfinancial.

Financial Till Date: 

Comments:

[← Previous](#) [Submit](#)

6. If you need to refund the Member click on the **Cancelled** menu on the left hand menu



7. Click on the \$ sign next to the member that you have just cancelled, fill out the required information and click **Process**

9636197	06-Oct-2016	B, Sam	\$140.00	06-Oct-2016		
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Records: 1 of 2

Issue Refund

The credit card will be refunded: \$140.00

If you are sure you want to proceed click "Process Refund" to process refund now.

The "Process Refund" button should be pressed only once.



Cancelling an unpaid transaction can be done if a payment has been generated for a member and they have either already reregistered through the Members portal, or they have chosen not to renew their membership with your organisation.

You can also cancel and refund from the members record. To do this please go to **Members, Members Listing** and click on the member record. Click on the **History** button, and then click on the Subscriptions tab. Click **Cancel** next to the subscription. A \$ sign will then appear next to the members cancelled subscription. From here you can click on the \$ sign and process the refund.

If you can't find the transaction you need to cancel, then check your date settings in **Subscriptions > Options** to ensure that your date range includes the date of the transaction you wish to cancel.

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