

Refund an Invoice

Only persons with the Admin and the Treasurer permission set can refund donations or invoice payments.

On the People main menu, find the person

On the person's profile page, the default tab is the dashboard (shown below as underlined in blue)

Dashboard Edit Location **Finances** Profile Network Relationships Value to lww Paths Merge duplicates



Go to the Finances menu choice as indicated by the red arrow above.

Donations the person has made are listed but invoice payments are listed as revenue as indicated below

Dashboard Edit Location **Finances** Profile Network Relationships Value to lww Paths Merge duplicates

\$35.00 donated \$0.00 pledges \$35.00 fundraised **\$460.00 revenue** \$0.00 credit \$0.00 prepaid \$0.00 expenditures



Click on the revenue amount. (It turns blue when you hover over it.) In the instance shown below a member registered for the 2017 Convention twice.

Reference	Name	Service period	Amount	Payment	Closed	Status
1078	2017 LWVMD Convention, 1 ticket	06/10/2017 - 06/11/2017	\$230.00	Credit Card	05/16/2017	closed
1077	2017 LWVMD Convention, 1 ticket	06/10/2017 - 06/11/2017	\$230.00	Credit Card	05/16/2017	closed



Next click on the Reference number. 1078 and 1077 are the two reference numbers above.

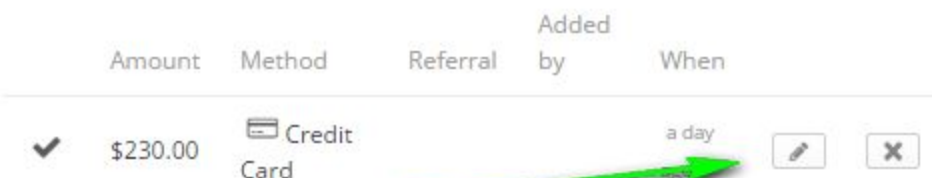
Now to the right-hand side of the screen you will see the amount of the invoice in question and a small pencil for editing as indicated by the green arrow ...

Item

1 x \$230.00 3day/2nights

Payment

	Amount	Method	Referral	Added by	When	
✓	\$230.00	Credit Card			a day	 



After you click the edit arrow you

will see the Refund option (finally!)

Finances: Invoices: 2017 LWMD Convention, 1 ticket - \$230.00: Payment

\$230.00 Credit Card	YES success
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[Settings](#) [Refund](#)



You can refund some or all of an invoiced amount by following these steps.