

Wild Apricot Cheat Sheet #12

Issuing a Partial Refund on a Paid Invoice

Note: Begin with Cheat Sheet #11 following steps 1,2, and 3. Then continue below.

1 Enter the partial refund amount, record the refund tender, add any internal notes and/or comments to payer. Save.

2 Return to Invoice, Open and Edit Invoice.

3 Add new line item and add the partial refund amount. Note: Amount of refund is entered as a negative number. Save.

4 Return to Payments and Refunds. Click the Settle button to settle the payment. We will settle Invoice # 77.

5 Payment details will show Settled.

6 Return to Invoices. Invoice shows refunded amount reflected.