



How to Refund Registration on Blue Sombrero

Refunds

There are many different scenarios that can arise when issuing refunds for registration. Below are a few examples.

If you are using our merchant account: You will only be allowed to refund credit card payments if you have enough money in your invoice balance pool. Your pool consists of credit card payments collected during the current invoice period. Check out our [disbursement schedule](#) on our Accounting FAQ's page to see when invoice periods begin and end.

Money will start accumulating in your pool at 6:01 PM ET at the beginning of the next invoice period. You can always refer to the Account Summary Report, located in the Billing Reports section, to know the amount of money in your pool. Be sure to enter the disbursement period end date as the Start Date.

If you use your own 3rd party merchant account, most 3rd Party Merchant Accounts allow you to issue refunds directly back to user credit cards.

If you still choose to refund back by check, you, the club, will be responsible for sending the check out.

Refund Examples:

Scenario 1 (**Most Common**):

A user registered and paid, but does not want to play anymore, so they need a **full refund** and their **registration cancelled**.

1. Go to **Orders**.
2. Find the order that you wish to **refund** by searching or using one of the filters provided.



3. Once you find the order you want to refund, click the **Manage** button next to it.



4. On the **Order Details** screen, find and click on the **Refund** button.

Hermione Granger
Order Status: PENDING
Billing Details Print Page

Order #4172941
Made on 1/9/2017 5:07:53 PM
Order Amount: \$350.00
Payment Amount: \$200.00
Total Due: \$150.00

Order Details:

	Item Price	Payment	Balance	
1 Hermione Granger 12/12 Non Tryout >> Division 1	\$350.00	\$200.00	\$150.00	Edit Transfer X Cancel Registration

Payments

Refund Receive Payments

Date	Amount	Method	Status	Subscription	Item
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5. On the next page, click on the **Refund** button again and enter the amount you'd like to refund the user.



Payment Date	Method	Status	Total Amount	
01/09/2017	Credit Card	Completed	\$200.00	<input type="button" value="Refund"/>
Program	Division	Player Name/Team Name	Amount	Refund
12/12 Non Tryout	Division 1	Hermione Granger	\$200.00	\$ <input type="text" value="200"/>
Total Completed			\$200.00	

6. Scroll down to the **Refund/Void Information** section and choose whether you want to refund directly back to the user's **credit card** or if you'd like to send them a **check** instead.

Make sure you give a **Reference/Memo** for this refund if it is a check and choose whether or not you would like to send an **email confirmation** to the user regarding this refund.

Refund/Void Information

Refund Type * Credit Card Mail in check
Refund Amount * \$200.00
Email Confirmation Yes No

7. Click **Submit**.
8. Go to **Orders** >> filter or sort for the order you need to cancel >> click **Manage** next to the order >> and then click **Cancel Registration**.

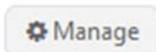
*The **Amount to Refund** on the Cancellation screen will show as \$0.00 since you already refunded the account.



Scenario 2:

Someone registered and paid too much (the full price instead of a minimum payment option), but still wants to play. This person still **needs to pay off the full amount**, but can't do it all at once.

1. Go to **Orders**.
2. Find the order that you wish to **partially refund** by searching or using one of the filters provided.
3. Once you find the order you want to partially refund, click the **Manage** button next to it.



4. On the **Order Details** screen, find and click on the **Refund** button.



Hermione Granger
Order Status:
PENDING
Billing Details Print Page

Order #4172941
Made on 1/9/2017 5:07:53 PM
Order Amount: \$350.00
Payment Amount: \$200.00
Total Due: \$150.00

Order Details:

1 Hermione Granger
12/12 Non Tryout >> Division 1

Item Price	Payment	Balance
\$350.00	\$200.00	\$150.00

Edit Transfer X Cancel Registration

Refund Receive Payments

Date	Amount	Method	Status	Subscription	Item
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5. Enter the **partial amount** (the amount they overpaid) that you'd like to refund to the user.

Payment Date	Method	Status	Total Amount	Refund
01/09/2017	Credit Card	Completed	\$200.00	<input type="button" value="Refund"/>

Program	Division	Player Name/Team Name	Amount	Refund
12/12 Non Tryout	Division 1	Hermione Granger	\$200.00	\$ <input type="text" value="100"/>

Total Completed \$200.00

6. Scroll down to the **Refund/Void Information** section and choose whether you want to refund directly back to the user's **credit card** or if you'd like to send them a **check** instead.

Make sure you give a **Reference/Memo** for this refund and choose whether or



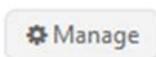
not you would like to send an **email confirmation** to the user regarding this refund.

7. Click **Submit**.
8. Now the user will have an open balance on their account for the partial amount that you refunded them. They can log in to their account and pay this balance whenever they'd like.

Scenario 3:

Someone gets injured in the middle of the season, but already paid for the whole season -- so they need a **partial refund** without cancelling their registration.

1. Go to **Orders**.
2. Find the order that you wish to **partially refund** by searching or using one of the filters provided.
3. Once you find the order you want to partially refund, click the **Manage** button next to it.



4. Click the **Edit/Collapse** button >> and then the **Add Fee/Discount** button.



Hermione Granger

Order Status: PENDING

[Billing Details](#) [Print Page](#)

Order #4172941

Made on 1/9/2017 5:07:53 PM

Order Amount: \$350.00

Payment Amount: \$200.00

Total Due: \$150.00

Order Details:

1	Hermione Granger 12/12 Non Tryout >> Division 1	Item Price \$350.00	Payment \$200.00	Balance \$150.00	Collapse Transfer X Cancel Registration
Description ⓘ	Price	Notes ⓘ	Notify? ⓘ		
Division Price	300.00				
Account level fee	50.00			Edit X	
Total Installment Fee	0.00				
Item Total	\$350.00				+ Fee/Discount

5. In the **Description** column, give details about the adjustment you are making (ex. Partial Refund for Injury) -- this will be visible to the user.

In the **Price** column, enter a **negative amount** for the amount you want to take off the order so you can refund the user in step 8. See image below.

In the **Notes** column, enter a short note as a reminder (ex. your initials or a brief explanation for why you are adjusting the order).

Give Discount Charge Fee



6. Make sure you hit the **Save** button. The partial amount will now show up as an **Open Order** (the amount will be in parentheses -- as in the club owes the user money).
7. Now go to **Orders >> Open Orders**.
8. **Refund** the amount that is now open on the order (See [Refund Payments for Open Orders](#)).

If you do need further assistance, Regional Commissioners will receive priority support by emailing aysosupport@bluesombrero.com or by calling 866-258-3303. Parents with questions may email support@bluesombrero.com.