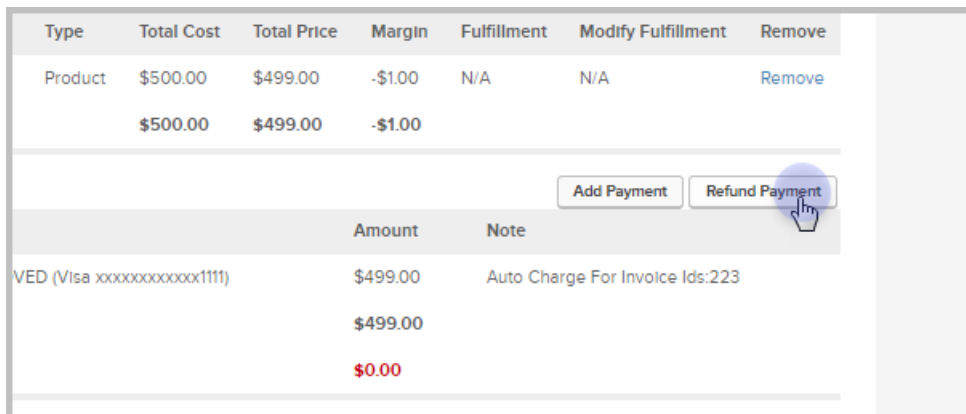


Void a payment

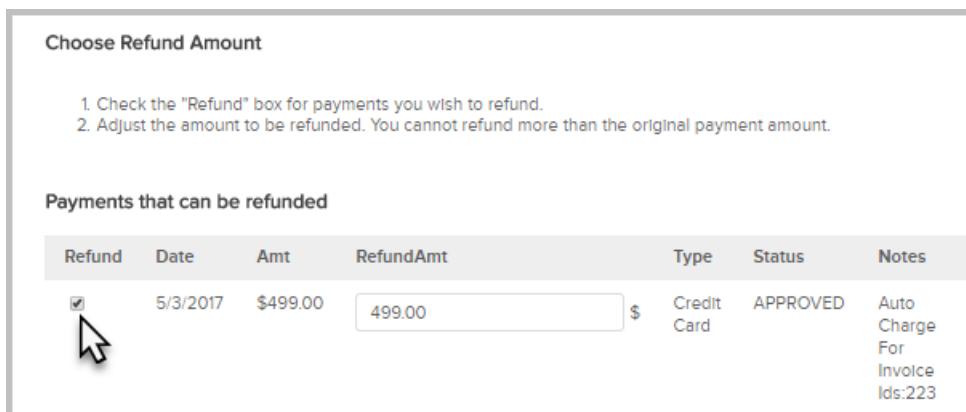
This article applies to:

You generally void a transaction when a customer cancels an order right away, makes duplicate purchases in error, or asks to change their method of payment. You can only void pending transactions - the ones that have not yet been settled by your merchant account (which usually happens the same business day as the original charge). You can verify the payment's status by logging into your merchant account and searching for unsettled transactions. An unsettled transaction is a charge that the customer can currently view on their account transactions as a pending charge, but it will be removed (normally by the next business day) when you void the payment.

1. While viewing a contact record, click on the **Orders** tab.
2. Click on the name of the order to open it.
3. Click the **Refund Payment** button.



4. Mark the checkbox beside the payment you wish to void and enter the reason for the void.



5. Click the Next Button to Proceed. Note: When you void a payment, you will cancel the entire amount. You cannot adjust the refund amount.
6. Choose **Void** from the *Gateway Options* and click on the **Next** button to proceed. A void cancels a pending

charge in the merchant account so that it never appears on the customer's credit card statement. Note: If the gateway does not show up on the list, then you must log into the merchant account separately to void the transaction.

Choose Refund Amount

1. Check the "Refund" box for payments you wish to refund.
2. Adjust the amount to be refunded. You cannot refund more than the original payment amount.

Payments that can be refunded

Refund	Date	Amt	RefundAmt	Type	Status	Notes
<input checked="" type="checkbox"/>	5/3/2017	\$499.00	<input type="text" value="499.00"/>	\$ Credit Card	APPROVED	Auto Charge For Invoice Ids:223

7. In the **Issuing a Credit** section select the check box to **Issue credit so that customer does not owe anything on this invoice** if the voided balance should not return the owed balance. If the contact will still need to pay this voided balance, leave the box un-selected.

REFUND VS CREDIT

Refund
A refund is money that you are giving back to the client. The previous steps you have completed have set up the *refund* portion. Examples of refunds are writing a check or putting money back on someone's card. A refund will always have a negative value in the crm, since the money is leaving your hands.

Credit
A credit is the same as a payment except you are not actually making any money. A credit is used to balance an order so the client will not be billed for the remainder of the charges. Since a refund creates an amount owed (it is negative), a credit is required to fill that hole.

This invoice total: **\$499.00**
Amount of the refund: **\$499.00**
Amount owed after refund: **\$499.00**

Issue credit so that customer does not owe anything on this invoice

8. (Optional) Go to the **Referral Partner Commissions** section to tell Max Classic how to adjust referral partner commissions after the void is processed.

- **Apply Refund to Referral Partner Commissions (Clawback):** If you mark this checkbox, Max Classic will retract or take back the commissions that the partner earned for this sale, based on the refund amount.
- **Apply Credit to Referral Partner Commissions:** If you mark this checkbox, Max Classic will retract or take back the commissions that the partner earned for this sale, based on a credit applied to a future balance due. *Note: This does not apply to voids.*

9. Click on the **Next** button to confirm you want to complete the void. The customer will receive an invoice confirming that the void has been processed. Review the status messages on this screen. They will tell you if the charge was refunded automatically or if you need to log into your merchant account to complete the financial end of the refund process.

10. Click on **Next** again to review the adjusted order record.

