

Issue a refund

This article applies to:

Here is a list of supported merchant accounts and whether or not you can refund and/or void payments within Keap. Yes means you can issue a void/refund from within Keap and No means you will need to sign in to your merchant account, issue the refund, and then reconcile the balance in Keap. If you are unable to issue refunds for a merchant account identified below as one that supports refunds, please contact the merchant account to issue the refund.

Merchant Account	Can Refund?	Can Void?
WePay	Yes	Yes
Authorize.NET	Yes	Yes
Authorize.NET (Card Present Method)	Yes	Yes
eWAY	No	No
Nexus Merchants	Yes	Yes
PayPal Express	No	No
PayPal Payflow Pro	No	No
PayPal Commerce	Yes	Yes
Stripe	Yes	Yes

You will refund a customer payment when these 2 circumstances are true:

- The payment was processed through one of the merchant accounts you have linked to Keap.
- The payment has settled and is no longer a pending charge in the merchant account.

Because the payment settled, the funds will be deposited into your account. The subsequent refund will be debited from your account. The refund option will return funds to the customer after they were previously charged. Both the charge and the refund will appear on the customer's account transaction history.

Pro-tip! If the customer paid a partial payment for the order, you can issue a credit for the remaining balance due as you go through the refund process.

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

\$15.00	N/A	N/A	Remove
\$15.00			
<input type="button" value="Add Payment"/> <input type="button" value="Refund Payment"/>			
Amount	Note		
\$15.00	Auto Charge For Invoice Ids:1429		
\$15.00			

- Mark the checkbox beside the payment you wish to refund, enter the reason for the refund, then click the **Next** button. Note that by default, Keap refunds the full amount, but you can override the total to issue a partial refund. In this example, we refund \$5.00 from a \$15.00 order.

Payments that can be refunded

Refund	Date	Amt	RefundAmt	Type	Status
<input type="checkbox"/>	6/5/2019 3:45 AM	\$15.00	<input type="text" value="5.00"/>	\$ Credit Card	APP

Please enter the reason for the refund in the box below:

- Choose **Refund**. This will initiate the refund process for a charge that has already fully processed in the merchant account. Note: If the gateway does not show up on the list, then you must log into the merchant account separately to issue the refund.
- Go to *Error Handling* to tell the system what to do if the automatic refund fails.
 - If an automatic refund fails, record the refund anyway: this option records the refund as completed, even if the merchant gateway does not automatically issue the refund.
 - If an automatic refund fails, skip that payment: this option does not record the refund unless the gateway successfully completes the automatic refund.
- Click on the **Next** button.
- Go to the **Issuing a Credit** section to enter a balance due beside **How much should the client owe you after this transaction is complete?**
 - If you enter a *\$0.00* as the balance due, Keap will record a refund for the amount indicated AND a credit for any remaining balance due.
 - If you enter a positive value, the customer will have a pending balance after you void the transaction. This might be necessary if the customer asks you to refund a credit card transaction, but the customer technically still owes the order balance.

Warning! Make sure to keep this at \$0.00. This charges the customer whatever is entered within this field.

9. (Optional) Go to the **Referral Partner Commissions** section to tell Keap how to adjust Referral Partner Commissions after the void is processed.
 - **Apply Refund to Referral Partner Commissions (Clawback):** If you mark this checkbox, Keap will retract or take back the commissions that the referral partner earned for this sale, based on the refund amount.
 - **Apply Credit to Referral Partner Commissions:** If you mark this checkbox, Keap will retract or take back the commissions that the referral partner earned for this sale, based on a credit applied to a future balance due.
10. Click on the **Next** button to confirm you want to complete the refund. If the order has the option to 'Email the invoice to the customer upon successful payment' is enabled, the customer will receive an invoice confirming that the refund has been processed. Review the confirmation screen to check the status of the refund and confirm the refund amount and credit amount are correct.
11. Review your work before clicking **OK** to process the refund.

□

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

Here is an example of an order after a refund has been processed:

Order Items							Calculate Tax	Add Order Item
Name	Price/Unit	Type	Total Price	Fulfillment	Modify Fulfillment	Remove		
Product	\$50.00 x1	Product	\$50.00	N/A	N/A	Remove		
ORDER TOTAL			\$50.00					
Payments							Add Payment	Refund Payment
Date	Type	Status	Amount	Note				
9/18/2020	Credit Card	APPROVED (Visa xxxxxxxxxxxx1111)	\$50.00	Auto Charge For Invoice Ids:63				
9/18/2020	Refund	Refund Applied	-\$50.00	Payment refunded through gateway				
9/18/2020	Credit	MANUAL - PAID	\$50.00	Refund				
Payment Total			\$50.00					
BALANCE			\$0.00					
Commissions							Recalculate	Create Commission
Referral Partner	Commission	Item	Sold	Earned				
No Commissions to Display								

The yellow line shows the amount of money refunded to the customer. Because I indicated the customer

would owe \$0.00 after the refund, an automatic credit of \$50 was added to bring the total order balance to \$0.00.

Pro-Tip! If there is only one payment on an order, you can only refund an order one time. You can either refund it as a full refund or a partial refund.

If you refund a partial payment you will not be able to go back to the order at a later time and apply another full or partial refund towards the remaining balance on the order. In that case you would want to reach out to your merchant account directly and refund the customer directly through them. You can then place a note on the order for your records.
