Cancelling Registrations, Issuing Credits, and Refunding Credit Card Payments

1. Logon to Certain and click on Events from the blue menu bar at the top.

2. From the events list, hover your mouse over the event containing the registration/registrations that need/s to be cancelled and refunded, and then click anywhere on the event’s listing.
3. Select the Complete registrations by clicking on the total number of Complete registrations.

4. The Certain Meetings Planner’s View Report Results window pops up. Maximize the popup window by clicking on the maximize button on the top right corner of the window.
5. Select the individual/s whose registration/s need/s to be cancelled by clicking on the checkbox of the registration record/s (under the Seq column).

6. From the dropdown |--- Select an Action Below ---| , select “Change Status to Cancelled” and then press the Go button.
7. Close the popup window displaying the registrations by clicking on the “X” at the top right corner of the browser window.

8. Refresh the registrations to display the new cancellations in the “All Registrations by Status” section, by clicking on the Registrations tab.

<table>
<thead>
<tr>
<th>Attendee Type</th>
<th>Registered / Paid</th>
<th>Bal. Due</th>
<th>Pending</th>
<th>Cancelled</th>
<th>Total*</th>
<th>Collected*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attendee</td>
<td>9</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>9</td>
<td>$900.00</td>
</tr>
<tr>
<td>Trainee</td>
<td>3</td>
<td>0</td>
<td>0</td>
<td>3</td>
<td>3</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>12</strong></td>
<td><strong>0</strong></td>
<td><strong>0</strong></td>
<td><strong>1</strong></td>
<td><strong>12</strong></td>
<td><strong>$900.00</strong></td>
</tr>
</tbody>
</table>

* Includes all complete registrations, except those in a "denied" registration status. Totals do not include cancelled registrations.

Cancelled registrations should have increased
9. Click on the number of cancelled registrations to display the popup of cancelled registrations.

10. Refunds can be issued one at a time only. From the list of cancelled registrations, select an individual to issue a refund to by clicking the record number of the individual to refund.
11. Closing the Cancelled Registrations popup window will display the registration record of the individual to be refunded (it should be in the main browser window).

12. Click on the Payment link to display the List of Charges and List of Payments and Refunds.

13. On the List of Charges, if a credit exists, confirm that the amount is equal to the amount to be refunded. If it is, proceed to step 17.
14. If no credit exists, or if the amount is not the full amount to be refunded, you will need to create a credit balance that would create a net credit on the full amount to be refunded. Click on the ‘Add New’ button at the top right corner of the List of Charges.

15. Enter the credit details: Amount and a description. Note that the amount should have a minus sign in order to effect a credit. Remember to press Save after.

16. From the Payment window Summary, you should see a credit balance equal to the amount to be refunded in the Balance Due section.
17. Issue a refund as follows:

a. From the List of Payments and Refunds, click on the original credit card payment.

![List of Payments and Refunds](image1)

b. Enter any notes in the User Notes box if desired, and then click on the link ‘click here to apply a refund to this credit card.’

![Payment/Refund Information](image2)
c. A window reflecting the refund will be displayed. Press the Save button to process the refund.
*** DO NOT CHECK THE BOX MARKED ‘Refund has been processed’ ***

d. The Payment window should now reflect the refund, and a total balance due of 0.

Revision History:
Modified 5/1/2012 – MS
Modified 9/13/2012 – MS
Modified 2/21/2013 – MS
Modified 6/4/2013 – MS