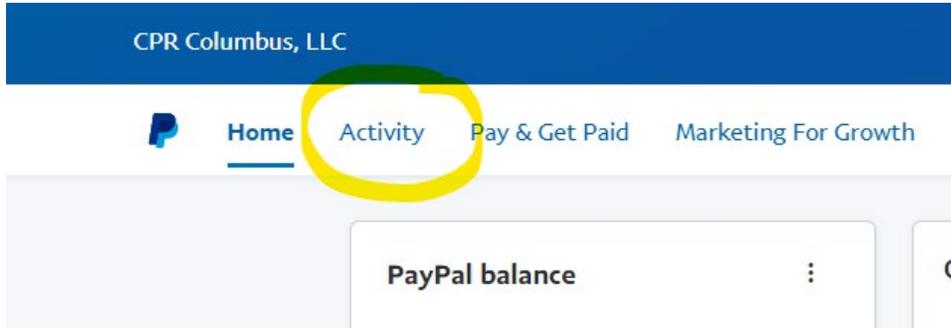


How To – Processing A Refund

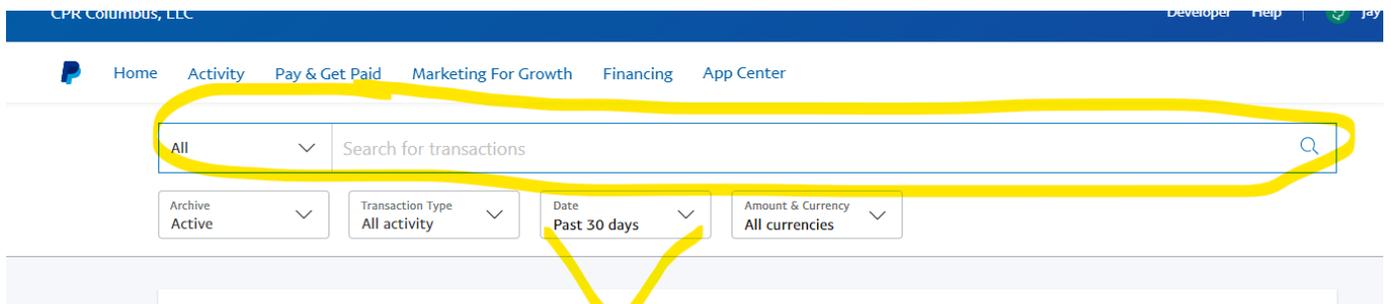
Step 1: Login to the City Specific PayPal Account and Find the Student

Hover your mouse over Activity at the top and then click on ALL TRANSACTIONS:



Step 2: Enter the customer's name in the "Search for Transactions" box seen below. Set the search term under "date" for the last year. See Below.

*If the customer does not come up when you search by name, search by their email address.



Step 3: Click on the customer's name in BLUE from the list of results

<input type="checkbox"/>	Date	Type	Name	Payment	Gross	Fee
<input type="checkbox"/>	12:20 PM	Refund to	Rachel Zolnier	Completed	-\$108.00 USD	\$0.00
<input type="checkbox"/>	12:14 PM	Refund to	Karen Miley	Completed	-\$20.00 USD	\$0.00

Step 4: Issue the Refund

Once their transaction order opens, click on Issue a refund in the top right corner under the gross \$ sale amount

Transaction details Print

Payment received from Chiemezie Amadi
March 21, 2022 at 4:54:21 PM EDT | Transaction ID: 8AE36709R4665780X
Payment Status: COMPLETED
Payment Type: Website Payments Pro

Gross amount
\$256.00 USD
[Issue a refund](#)

[Create a Transaction](#) |

OK to ship to
Chiemezie Amadi
4626 Nadine Park Dr

Seller protection
Not eligible

In the “Total Refund Amount” section, change the dollar amount from the total of the sale to the amount you want to refund if less than the original sale total.

Issue Refund

You can issue a full or partial refund for 180 days after the original payment was sent.
[All about refunds](#)

Contact info
Chiemezie Amadi
Chianotu@gmail.com

Transaction Id
8AE36709R4665780X

Original Payment
\$256.00 USD

Amount Remaining
\$256.00 USD

Total Refund Amount

This is the amount that will be deducted from your Pay
[Fee Refund Policy](#)

Make sure the TOTAL REFUND AMOUNT is correct in the box and then click **ISSUE REFUND**

The screenshot shows a refund form with the following elements:

- Amount Remaining:** \$256.00 USD
- Total Refund Amount:** A text input field containing "20.00", which is circled in yellow.
- Text below Total Refund Amount:** "This is the amount that will be deducted from your [Fee Refund Policy](#)"
- Invoice Number (Optional):** An empty text input field.
- Note To Buyer (Optional):** An empty text area.
- Buttons:** A blue "Issue Refund" button and a white "Cancel" button, both circled in yellow.

After you click **ISSUE REFUND** it will take you to the verification page confirming the Refund was issued and will show the correct Dollar Amount with the student's name.

Step 5: Send the **REFUND ISSUED** email template to the customer

- Go to the city specific Outlook Email Inbox
- Locate the student order email you are refunding
- Click **REPLY ALL** and **make sure the city email is copied on the email**
- Add a reason to the email template below. For example, you could start the email with We are very sorry we had to cancel your class, or We are issuing this refund because you have signed up for a different class, etc.

Email Template-

Subject Line: **REFUND ISSUED for Order # (enter order #)**

Hi (customer name)!

This email confirms we have issued a refund for order # (order number) in the amount of (\$ amount of refund) to your card. Please allow 5 business days for this to be reflected on your account.

If you need to register for any future training needs, please visit our schedule following the link below and click **NEXT** at the top right of the calendar to view future months:

(city URL/register page)

(Enter city specific signature)

Step 6: Document the REFUND ISSUED details on the student block in CPR.Center

Locate the student block in CPR.Center for the class/order you have refunded.

On the student block, document the total amount of the REFUND ISSUED. Include the original order number, details/reason, \$ amount of the refund, and confirmation you sent them the REFUND ISSUED email confirmation. Add your initials and today's date to the note on the student block and save.

Example:

REFUND ISSUED \$105.00 for Order #17058 because we cancelled the student's class. Emailed the student confirming refund was issued. 3-21-2022 KS

Step 7: Move all Emails for this Refund to the Refunds Email folder in the Outlook Inbox