

# Refunds

15/07/2025 10:11 am BST

The Refunds screen allows you to refund transactions on a client's account.

## Details

To perform a refund, enter the Accounts Screen and select the 'Refunds' button.

The Discounts Screen consists of two tabs: 'List Items for Refund' and 'Monetary Refund'.

Accounts

List All Payments **Refunds** Discounts Credits Return Money Surcharges Notes HCP Accounts Statements

Clear

**List Items for refund** Monetary Refund

Refund Date: 14/07/2025 Refund Amount: 0 Note: These are items that have had payment(s) allocated against them. Refund Money Cancel

Refund	Date	Invoice No	Description	Surgeon	Patient	Qty	Net	VAT	Total	Discount/Credit	Amount Paid
<input type="checkbox"/>	27/05/2020 15:09	653666	FRONTLINE COMBO 3PK LGE 20...	M Perry	Beth	1.00	20.84	4.17	25.01	0.00	25.01
<input type="checkbox"/>	04/06/2020 15:58	655924	MAXITROL DROPS SML	A N Ridley	Beth	1.00	3.99	0.80	4.79	0.00	4.79
<input type="checkbox"/>	04/06/2020 15:59	655924	VACCINATION BOOSTER DOG	A N Ridley	Beth	1.00	31.32	6.26	37.58	0.00	37.58

## List Items tab

This screen is used to refund specific items.

**List Items for refund** Monetary Refund

Refund Date: 15/07/2025 Refund Amount: 0 Note: These are items that have had payment(s) allocated against them. Refund Money Cancel

Refund	Date	Invoice No	Description	Surgeon	Patient	Qty	Net	VAT	Total	Discount/Credit
<input type="checkbox"/>	01/09/2021 11:57	1010686	Aureomycin Wash Out	Joe Bloggs (JB)	Dog	1.00	3.03	0.61	3.64	0.00
<input type="checkbox"/>	02/11/2021 14:30	1010678	Consultation 2	Lisa Surname (Lisa)	Malibu	1.00	16.60	3.32	19.92	0.00

## Refund an item

1. Tick the box in the 'Refund' column of the item you wish to refund and you will receive a quantity selection pop up

Quantity Selection

Quantity: 1 Item Amount: 3.64

Associated reminder(s) for refunded item(s) will be deleted.

Return Money Select more.. Cancel

2. To proceed with the refund select 'Return Money'.
3. Select the payment method used to refund the Client.

Refund Confirmation - Aureomycin Wash Out

Refund Date

15/07/2025

Payment Method

Credit Card

OK

Cancel

- If the item is a stock item, you will be prompted to return the item to stock or not. If selecting 'Yes', select which Stock Centre you are returning stock to (if you only have one stock centre, this option will not display).
- The refund transactions will display in the Accounts Screen. The first transaction shows the account being credited, the second transaction shows the credit being refunded to the account.

	15/07/2025	1010854		15/07/2025 10:04	Credit Refund (Aureomycin Wash Out) (Jupiter)	Joe Bloggs L	0.00	1.00	-3.03	-0.61	-3.64
	15/07/2025	0	182156	15/07/2025 10:04	Credit Card return for (Jupiter)		-3.64	0.00	0.00	0.00	0.00

## Monetary Refund tab

Monetary Discounts are used to refund a User-defined amount.

List Items for refund

Monetary Refund

Refund Payment Property

Date:

15/07/2025

Payment Method

VAT Code:

T1 (20.0)

Description

Pricing Information

Total:

0

Refund Payments

Cancel

	Ins	Invoice Date	Invoice No	Payment ID	Item Date	Description	Surgeon	Receipts	Qty	Net	VAT	Total	Running Bal	Patient
		02/11/2021	1010678		02/11/2021 14:10	Consultation 2	Lisa Sunam...	0.00	1.00	16.60	3.32	1992	1992	Malibu
		04/11/2021	1010682		04/11/2021 09:17	Acp Tabs 25mg (Give () Tablets () Times Daily for () Days)	Joe BloggsL...	0.00	1.00	1.00	0.20	1.20	21.12	Malibu

## Refund a monetary amount

- Select the date and payment method you wish to use for the refund.
- Then enter a description and enter a total of the refund.
- Select 'Refund Payments'.
- The refund transaction will appear on the Client's account (unallocated).

15/07/2025	0	182157	15/07/2025 10:10	Credit Card return for User Return Payment (Goodwill) ...	-1992	0.00	0.00	0.00	0.00	141.12
15/07/2025	182158	182158	15/07/2025 10:10	Credit (Jupiter)	0.00	0.00	-16.60	-3.32	-1992	121.20