

Tutorial

Objective: Canceling an Existing Registration/Issuing a Refund

Canceling an Existing Registration

Step 1: In the **Register** section

- Click the **Register** tab.
- Locate the **Person** that you intend to cancel a Registration for in the **Find Person** dropdown.
- Select the **Event** where this Registration is found in the **Find Event** dropdown. (Fig. A)

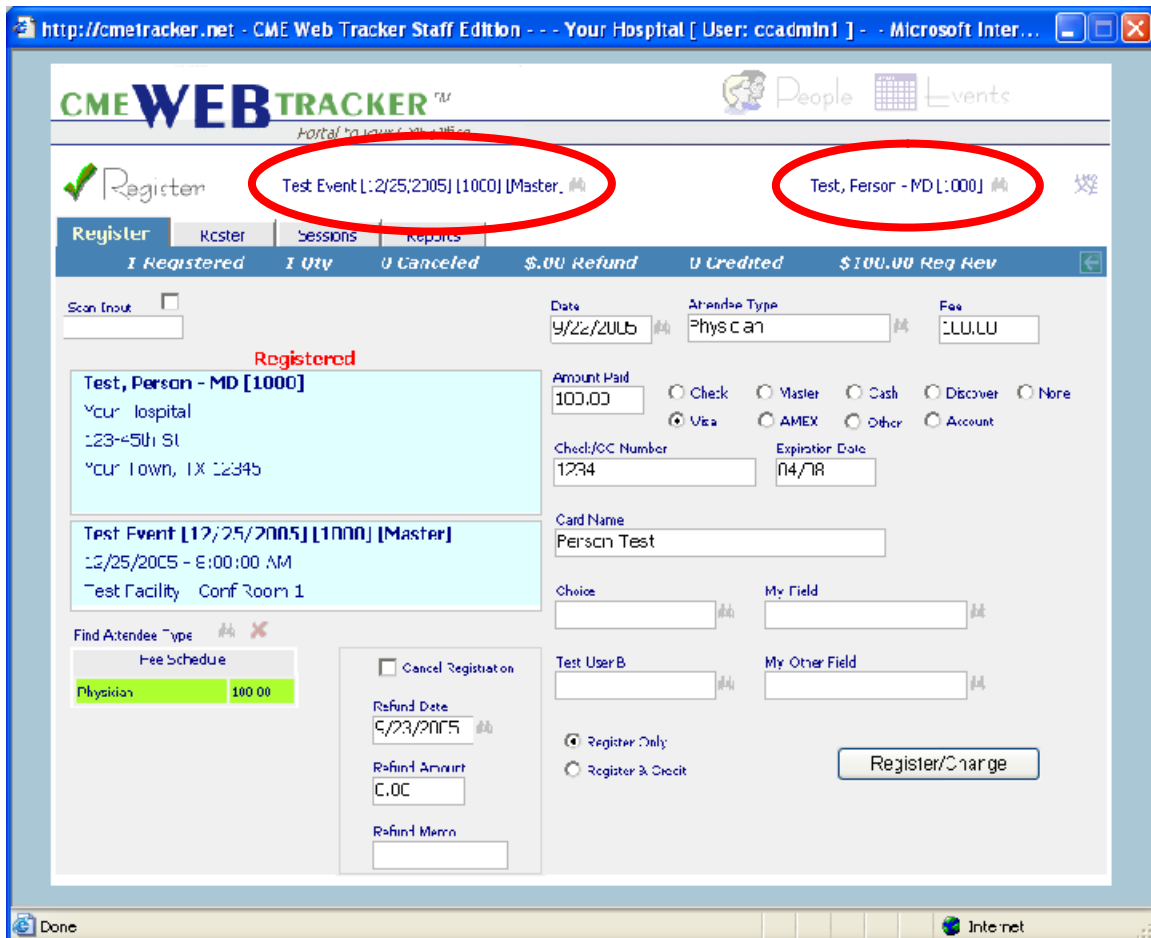


Fig. A

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Step 2:

- Click to check the **Cancel Registration** box.
- Click the **Register/Change** button. (Fig. B)

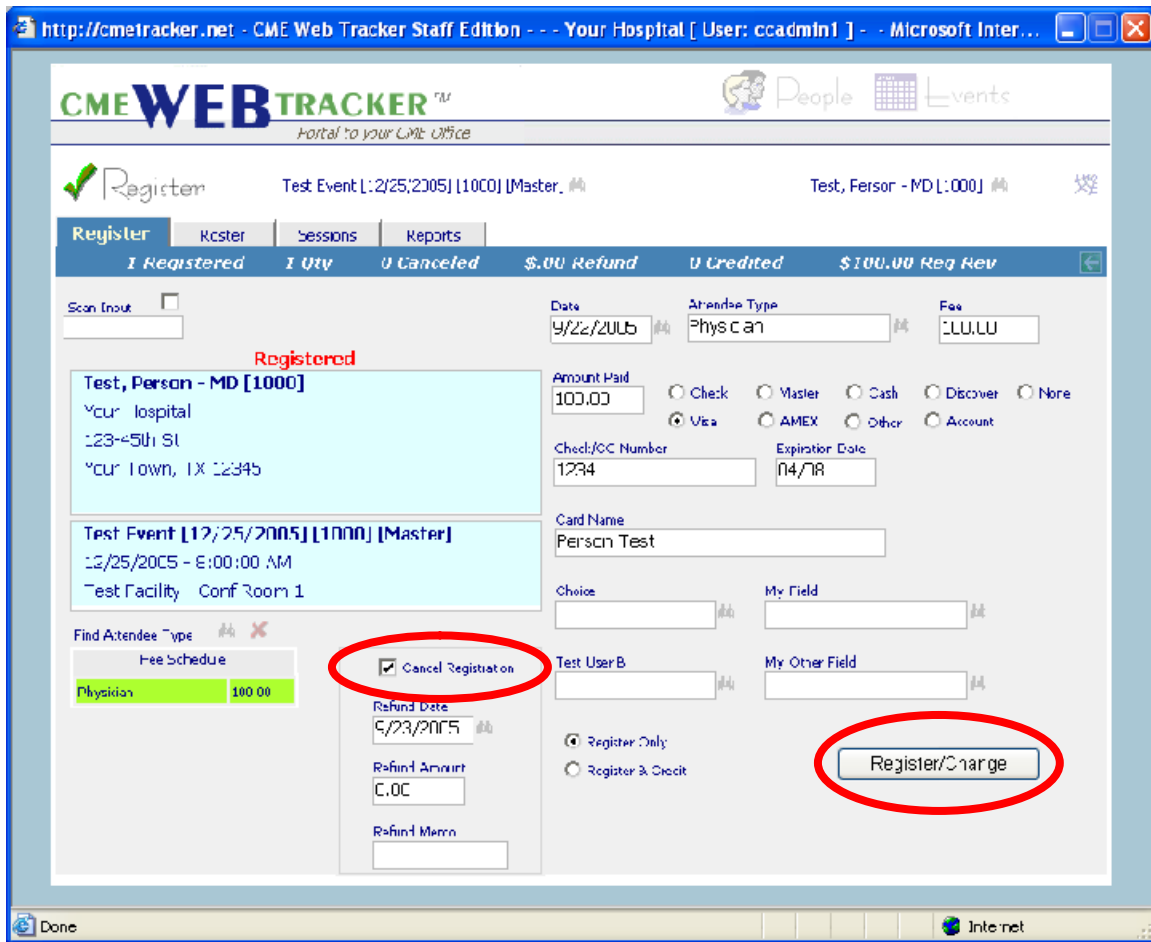


Fig. B

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- Step 3:** Once canceled, you will notice the following visual changes:
- The **People information box** is now shaded in **red**.
 - The **People information box** heading is now **“Canceled”**.
 - A total of the **Canceled Registrants** for the Event will be displayed in the **Blue tab bar**. (Fig. C)

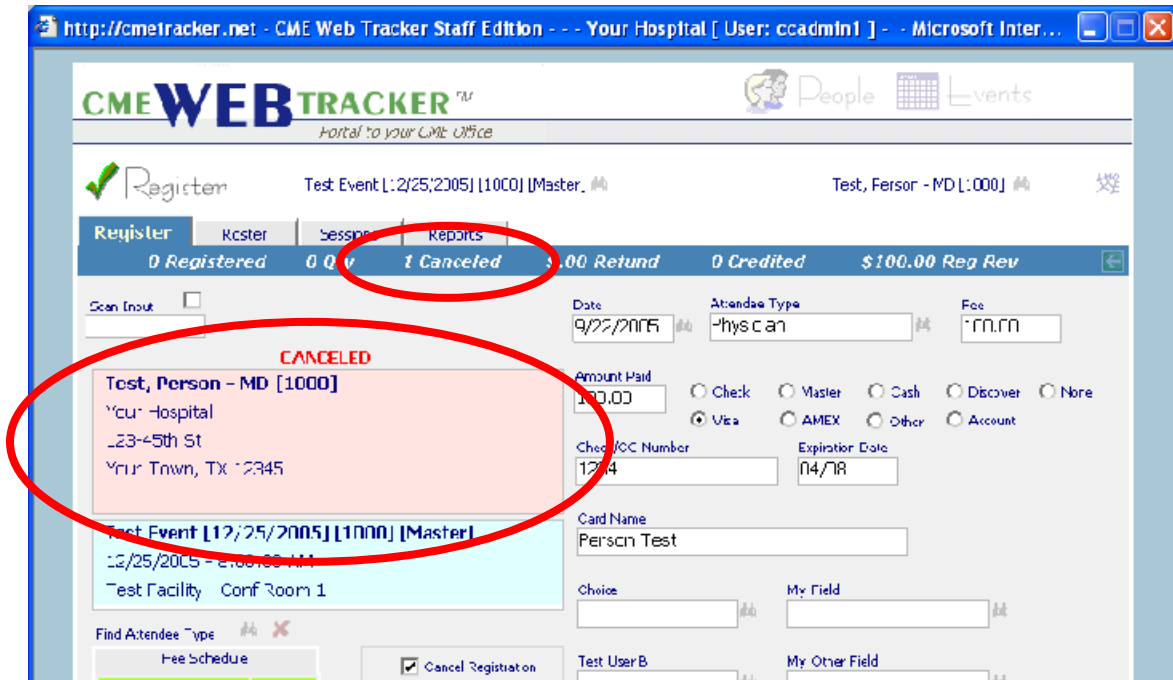


Fig. C

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Step 4: In the **Roster** tab, you will find the persons name is now displayed with a “strike through”, showing the person is canceled. (Fig.D)

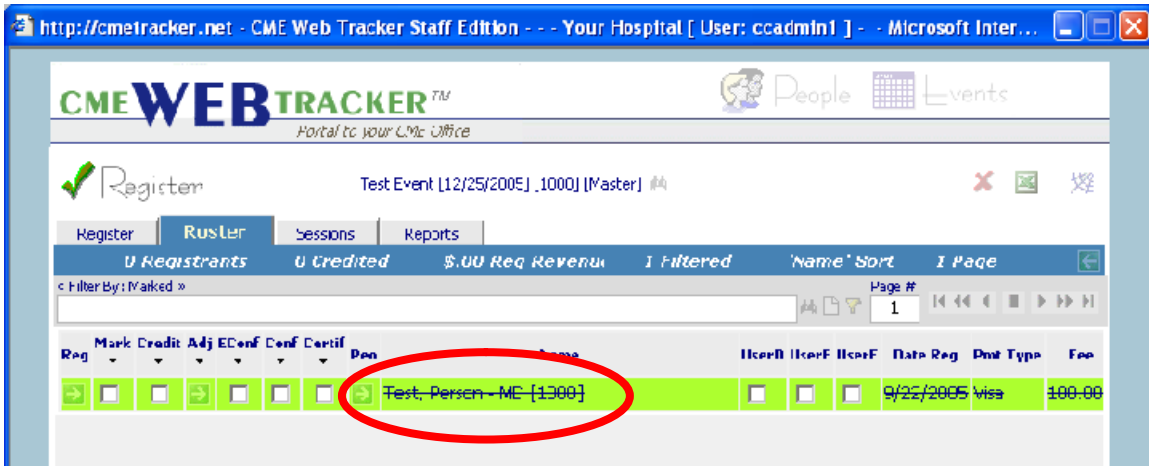


Fig. D

Notes:

People who are canceled are not expected to be included in Register reports such as Confirmation Letters, Sign in Sheets, Name Badges, etc.

People who are canceled are expected to be included in the Excel spreadsheet. If “Canceled”, this is noted in the Canceled column.

If you wish to filter on the “Cancel” field, you will always want to filter on {Cancel} True in order to display only those Canceled and {Cancel} not True in order to display those not canceled.

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Issuing a Refund

Note: You do not have to cancel a person in order to apply a refund; however, you must indicate a **Refund Date** in order to process a refund.

Step 1: In the **Register** section, **Register** tab.

- The **Refund Date** field will be automatically populated with today's date by clicking in the **Refund Date** field and pressing **Enter** on the keyboard.
- You may also click the **binoculars** to choose a date from a calendar popup.
- Enter a **Refund Amount**. You will want to type in the currency amount in the format 100.00 and press **tab** or **enter** to continue.
- The **Refund Memo** is intended for a check number or other transaction number related to this Refund.
- Click **Register/Change** to commit the change. (Fig. A)

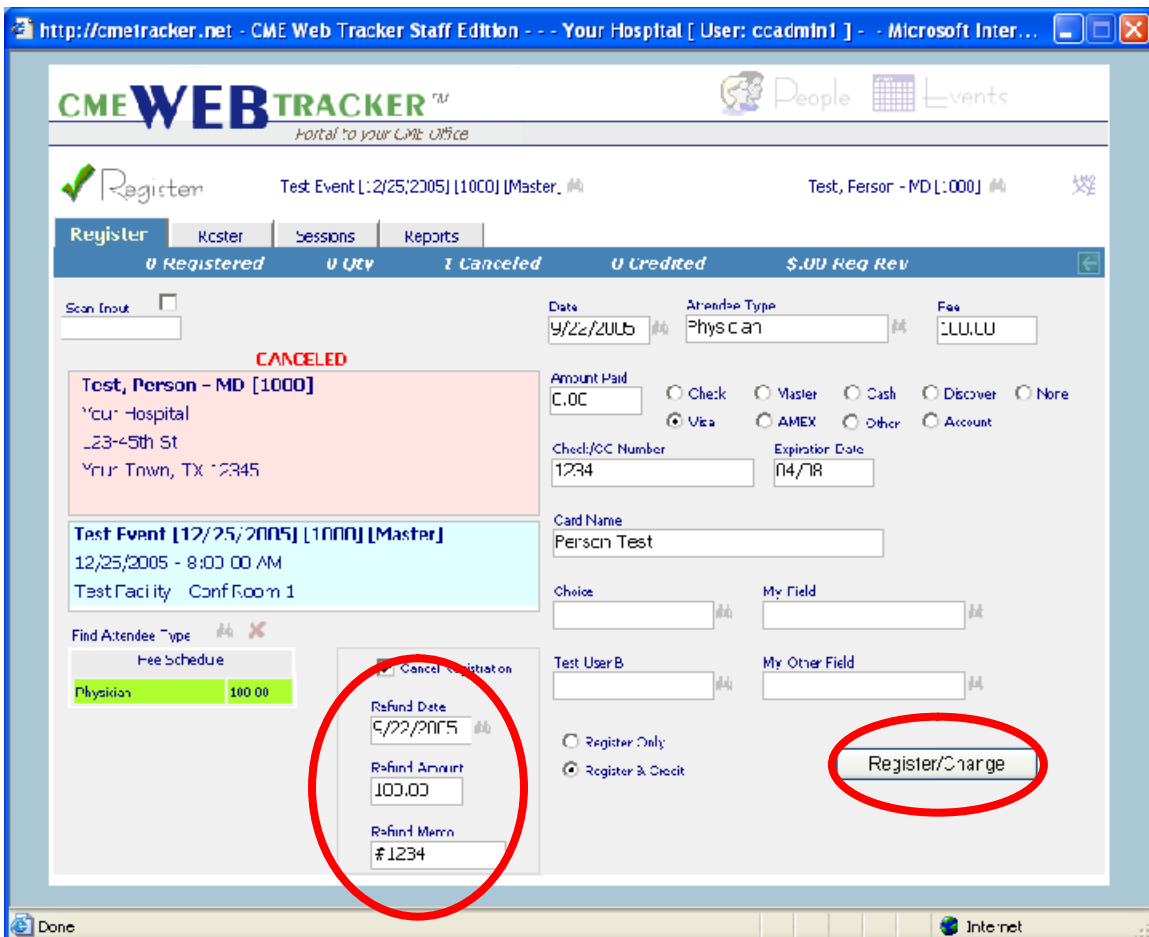


Fig. A

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Step 2: To review the revenue breakdown

- a. Click the **Events** icon
- b. Click the **Revenue** tab
- c. When a refund is issued, you will find two revenue records for the individual participant. One record will show the original amount paid. The second record will show the amount refunded. The **Refund** amount will be a **Negative** number. (Fig. B)

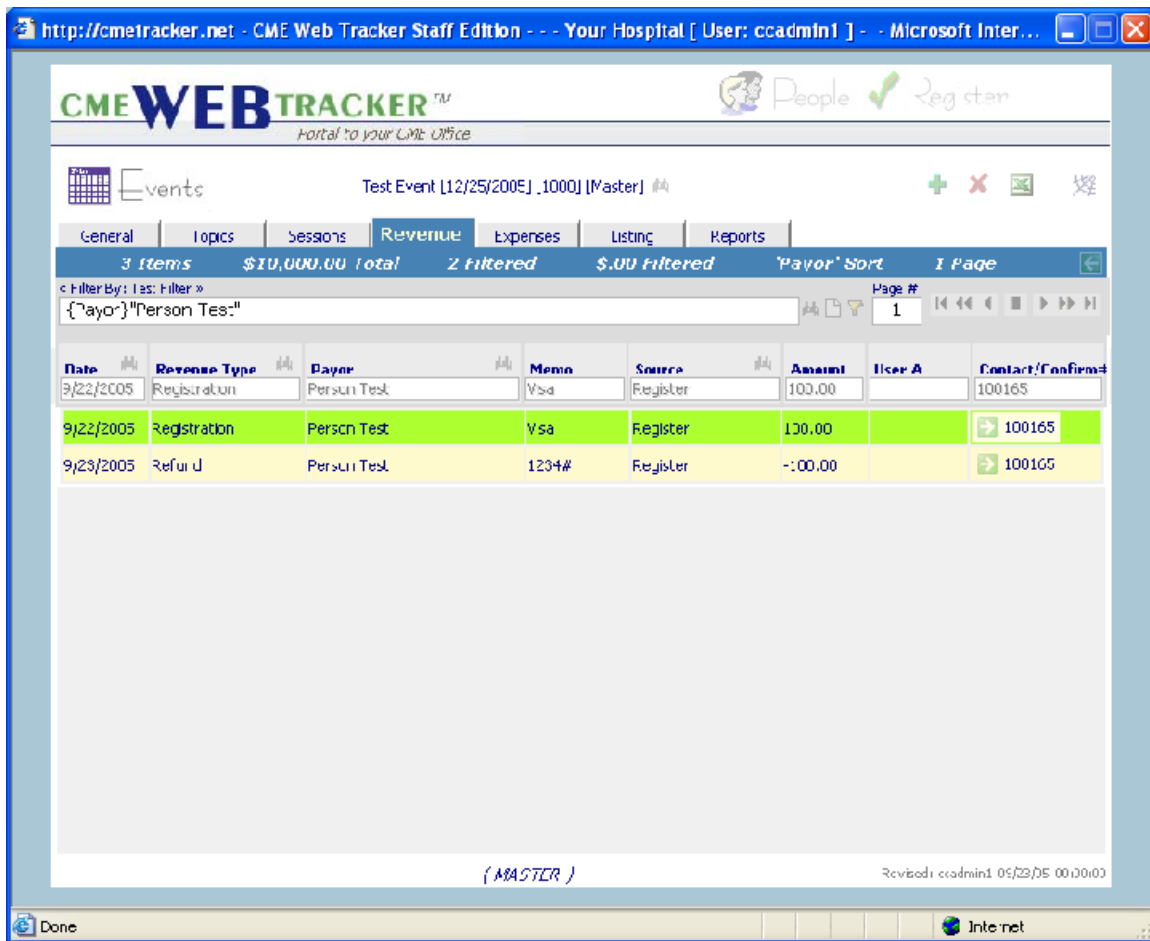


Fig. B