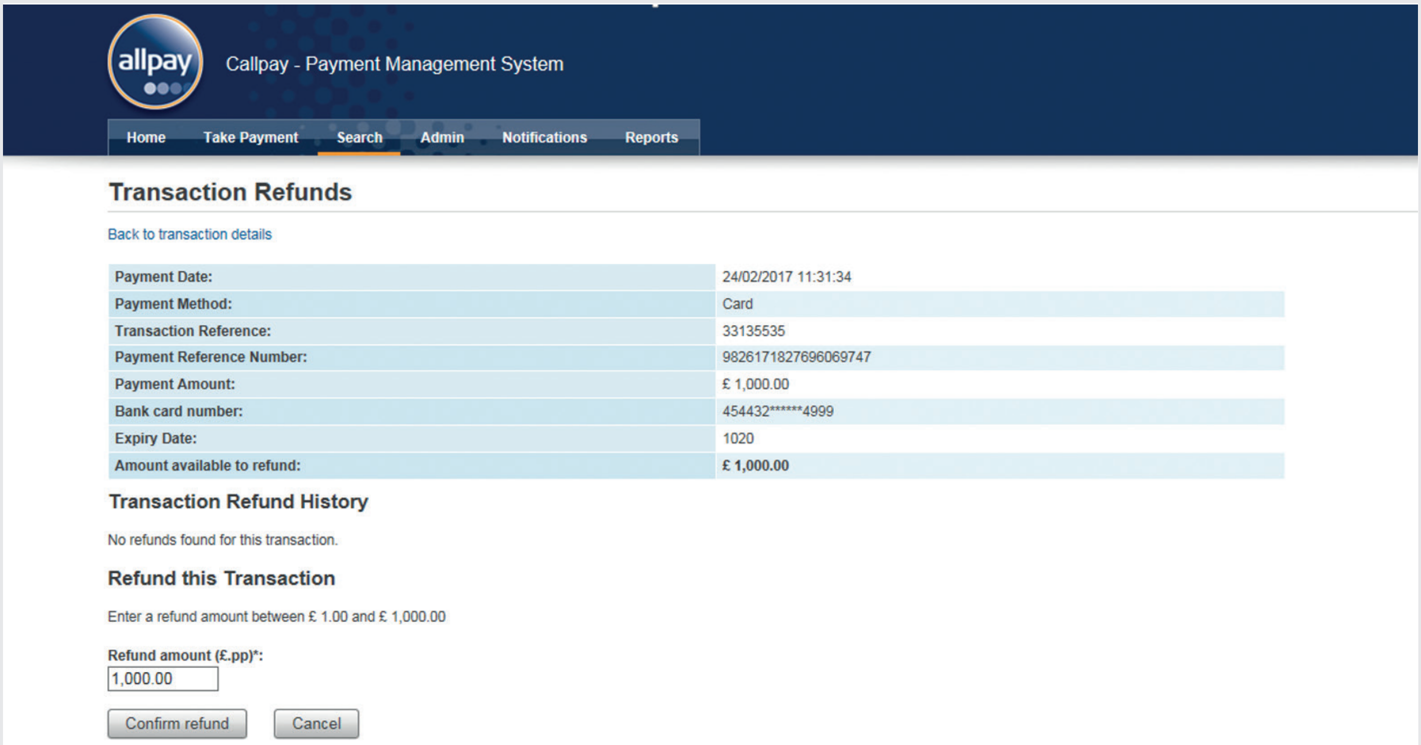
Quick start guide

allpay Partial Refunds in Callpay quick start guide

Please navigate to the website address **https://www.callpay.net** and reference this document.

User Permissions

1. Any User with permission to perform refunds is automatically granted permission to perform partial refunds.
2. To grant permission to perform refunds, navigate to **View Users** within the **Admin** tab and select a User.
3. Under **User Privileges**, tick **Refunder.**
4. The Refund option will now be visible when the User searches for a transaction.
   Please refer to the User Guide and Video Tutorials for further guidance.



Searching for a Transaction

1. It is now possible to search for transactions from **all debit and credit card payment sources** within Callpay.
2. The Search Criteria will default to '**All**' within **Transaction Source**, however it is still possible to search for transactions from specific sources e.g. Callpay, allpayments, IVR.
3. After entering the Search Criteria, click **Search** to view the results.
4. Select the transaction to perform a refund for by clicking **View**.

continued overleaf

Step 1 – Requesting a Refund

1. Once the transaction for the refund has been located using the **Search** facility, click **Refund**.
2. If the full transaction amount has already been refunded, the **Refund** box will be disabled (greyed out).

Note: this will not refund the transaction at this stage, please use Step 2 to process the refund

Step 2 – Perform Refund

1. The **Refund Amount** field is pre-populated with the amount available to refund.
2. It is possible to manually enter the amount to refund in this field. Please see the '**Minimum and Maximum Transaction Amounts**' section below for details on the value that can be refunded
3. Click **Confirm Refund** to continue the process.
4. A confirmation screen is displayed to confirm the refund was completed successfully; a **Transaction Reference** is also provided.
5. Select **Finish** to return to the Search Criteria.
6. Select **Receipt** to open the receipt.

Step 3 – Receipt

1. The receipt opens in a pop-up window.
2. The receipt confirms the **Amount refunded**.
3. The **Scheme Code Description** is included as the **Description** on the receipt.
4. Contact information related to the organisation from whom the refund has been taken from is detailed at the bottom of the receipt.
5. It is possible to **print** the receipt using the button at the top of the receipt, or **email** the receipt by entering the Customer's email address and selecting **Email Receipt**.
6. Once complete, select **Close Window**.

Step 4 – Additional Refunds

1. To perform another refund against the same transaction, follow steps 1 and 2 again.
2. The **Transaction Refund History** will now display the previous refunds for this transaction, in descending order by date.
3. Up to **10 records** can be returned on one page, further records can be found by clicking on the additional page numbers.
4. The **Refund Amount** will pre-populate with the remaining amount to be refunded, after the previous refund has been completed.
5. It is again possible to manually enter the amount to be refunded in this field, before clicking **Confirm Refund**.

Minimum and Maximum Transaction Amounts

1. The **Minimum Amount** to refund is £1.
2. The User is prevented from performing a refund when the amount entered would leave the remaining amount below the minimum transaction value for the scheme code. E.g. £22.50 transaction value and £22.00 to be refunded would be prevented as this would only leave 50p remaining in the transaction.
3. The **Maximum Amount** to refund is the total amount of the transaction.
4. When the **Total Payment Amount** of the transaction has been refunded, a message will appear in the **Transaction Details** to confirm that "No further refunds can be made against this transaction" and the **Refund Amount** field will be greyed out.

Reports

1. As with the transaction search, it is possible to create reports based on the different **Transaction Source**.
2. The **User ID** section is only active when **Callpay** is selected within the **Transaction Source**.
3. The reports will display a **Source** column and a **Client ref** column.
4. All refunds, including partial refunds, are displayed in the **Refunds** section of the report, and are included in the **Credits Summary** at the end of the report.