Balance A Customer's Account That Was Refunded Outside Of Infusionsoft

When you manually refund a payment, the refund is recorded in Infusionsoft, but you must handle the financial end of the transaction outside of Infusionsoft. You will need to manually record the refund if:

- The refund has been issued from the merchant account already
- The customer paid with cash or check and the refund is being issued by check or cash
- The customer paid with a credit card, but the charge was processed outside of Infusionsoft

If the customer paid a partial payment for the order, you can apply a credit for the remaining balance as you go through this manual refund process.

1. While viewing the contact record, click on the **Order** tab.

2. Click on the name of the order to open it.

3. Click the **Refund Payment** button

4. Mark the checkbox beside the payment you wish to refund, enter the reason for the refund, and click the **Next** button.

5. Choose **Manual** if the order was originally processed through your merchant account. A Manual refund records the fact that the refund took place, but does not process the financial end of the transaction. Note: If the purchase was made by check, cash, or an outside credit card processing system, you will not see a gateway listed.

6. Click on the **Next** button.

7. Go to the **Issuing a Credit** section to enter a balance due beside **How much should the client owe you after this transaction is complete?**
    - If you enter a *$0.00* as the balance due, Infusionsoft will record a refund for the amount indicated AND a credit for any remaining balance due.
    - If you enter a positive value, the customer will have a pending balance after you void the transaction. This might be necessary if you issue a refund, but the customer technically still owes the order balance.

8. (Optional) Go to the **Referral Partner Commissions** section to tell Infusionsoft how to adjust commissions after the refund is processed.
    - **Apply Refund to Referral Partner Commissions (Clawback):** If you mark this checkbox, Infusionsoft will retract or take back the commissions that the partner earned for this sale, based on the refund amount.
    - **Apply Credit to Referral Partner Commissions:** If you mark this checkbox, Infusionsoft will retract or take back the commissions the commissions that the partner earned for this sale, based on a credit applied to a future balance due.

9. Click on the **Next** button to confirm that you want to complete the manual refund. The customer will receive an invoice confirming that the refund has been processed. Review the confirmation screen to check the status of the refund and confirm the refund amount and credit amount are correct. Make sure you manually process the financial end of the refund transaction by issuing a check or manually issuing a refund through your merchant account.

10. Click on the **Next** button again to review the adjusted order record.