How do I issue a refund?

16/06/2025 4:49 pm AEST

Overview

If you are processing online payments through Passport, you can issue a refund directly back to the original cardholder through your transaction list.



Note: Before continuing on, please ensure you have set up your Stripe account using the steps outlined here - it needs to be completed before any funds can be transferred in order for admins to process a refund. Also make sure that the REFUND PERIOD set accordingly.

Be mindful that there may be instances in which your refund cannot be processed, including:

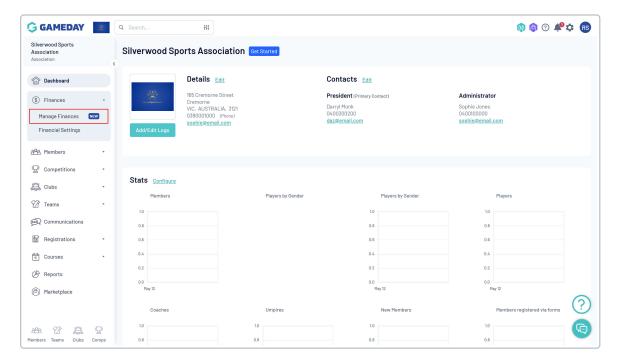
- The transaction has not finished processing yet
- The transaction was processed manually instead of through our online payment gateway (I.e. the transaction was paid by cash or other means outside of the platform, then marked as paid manually in your database)
- The product purchased had a payment split applied and was sent to multiple different bank accounts
- The product purchased was created and owned by another hierarchy level
- Your current refund balance has insufficient funds to process the full refund due to incomplete Stripe account set up.
- Your organisation's refund period is not set accordingly

In these cases, the transaction will be 'greyed out' and unable to be selected when processing a refund, and the reason for unavailability will be outlined onscreen.

Step-by-Step

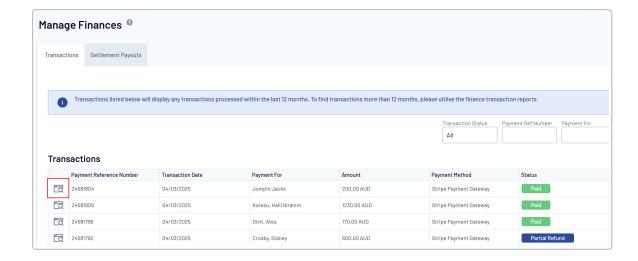
Step 1: Go to your Transaction list

In the left-hand menu, select Finances > MANAGE FINANCES



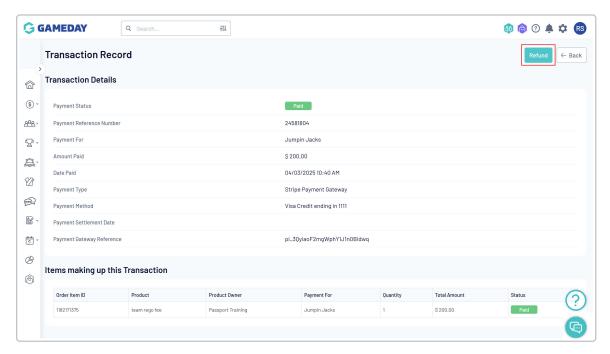
Step 2: View the Paid transaction you wish to refund

In the Transactions tab, click the VIEW icon next to the transaction you wish to refund to open the transaction details



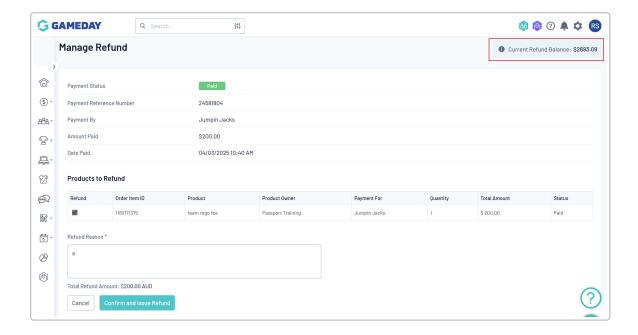
Step 3: Open the Refund screen

In the top-right corner of the screen, click the **REFUND** button



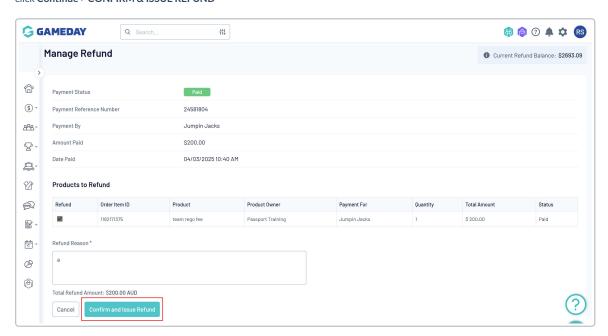
Step 4: Review your Current Refund Balance

In the top-right corner of this screen, you will notice the **Current Refund Balance**. This represents the total amount your organisation has available in it's account (based on payments processed online) with which to process direct refunds. Any transaction items that exceed this amount will not be refundable from the platform

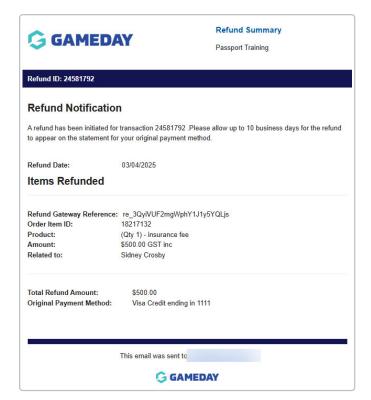


Step 5: Select the transaction items to refund

Use the checkbox to the left of the transaction items within this order to add them to the refund list, provide aRefund Reason, then click Continue > CONFIRM & ISSUE REFUND



Once the refund has been issued, the member will receive an email notification confirming the refund:



Watch

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