

## How to Refund a Prospect That Has Made a Deposit

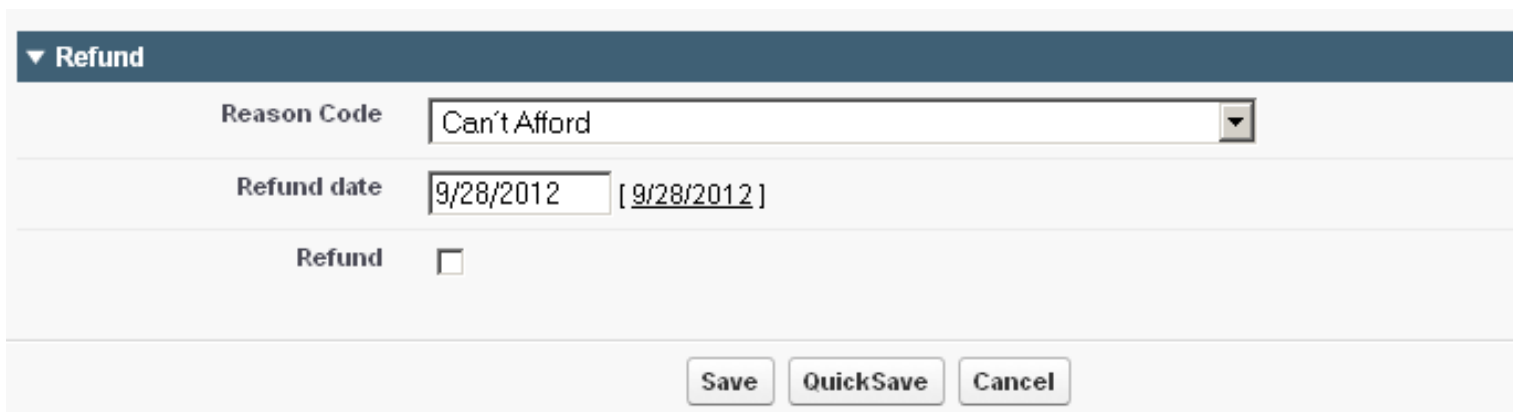
Sometimes you may have to issue a refund for a deposit that has been created through a move in planner. In order for this to go through correctly in your system and on the reports, you must use the Refund button.

Navigate to the move-in planner that is connected to the prospect that requires a deposit. Along the top there will be a button called Refund Deposit. Click it.



The screenshot shows the top navigation bar with the following tabs: Contacts and Influencers, Reports, Marketing Events, Residents, My Community, **Move-In Planner**, Billing Run, and a plus sign. Below the navigation bar, the page title is "Move-In Planner 005910". On the right side, there are links for "Customize Page", "Edit Layout", "Printable", and "Help for". Below the title, there are buttons for "Show Chatter" and "Follow". In the center, there are links for "Approval History [0]", "Notes & Attachments [0]", "Quoted Services [0]", "Residents [0]", and "Suites [1]". At the bottom, there is a "Move-In Planner Detail" section with buttons for "Edit", "Delete", "Clone", "Submit for Approval", "Create Resident", "Move-In Resident(s)", and "Refund Deposit". A large green arrow points down to the "Refund Deposit" button.

On the next screen, make sure all the information is correct.



The screenshot shows a form titled "Refund" with the following fields:

- Reason Code**: A dropdown menu with "Can't Afford" selected.
- Refund date**: A date input field with "9/28/2012" entered and a calendar icon to its right.
- Refund**: A checkbox that is currently unchecked.

At the bottom of the form, there are three buttons: "Save", "QuickSave", and "Cancel".

Choose a reason code, the date of the refund, and check the Refund checkbox. Save.

What this button did is credit the exact amount of the refund that was on that move-in planner. If the resident was moved-in already, this will not work. To make sure everything went well, head back to their original Prospect file.

The system will update the original prospect, close the Move-In Planner & create a new Resident Transaction offsetting any previous unapplied deposits (across all his/her Move-In Planners).

[Open Activities \[3\]](#) | 
 [Activity History \[3\]](#) | 
 [Marketing Events Attended \[0\]](#) | 
 [Tour Planner \[1\]](#) | 
 [Move-In Planner \[1\]](#) | 
 [Notes & Attachments \[0\]](#) | 
 [Resident Transactions \[2\]](#) | 
 [Resident Transactions H](#)

Resident Transactions		New Resident Transactions		Resident Transactions H		
Action	Description	Resident Name	Resident ID	Amount	Community ID	Audit No.
<a href="#">Edit</a>   <a href="#">Del</a>				\$500.00	iaRetirement- GTA	4180
<a href="#">Edit</a>   <a href="#">Del</a>				-\$500.00	iaRetirement- GTA	4682