

How to Refund a Resident Balance

Description

After a Resident has been moved out and a final bill has been created, use this function to close out any unapplied credits.

The system will:

-  Create a Resident invoice record and apply it to any open Resident transaction balances

Step by Step

- 1** Navigate to the Resident's profile
- 2** Click on **Invoice Application**
- 3** Specify an **Invoice to Apply**
- 4** Specify the **Resident Transaction to Apply**
- 5** Enter an **Amount to Apply**. If left blank, the maximum will be applied.
- 6** Specify a **Date to Apply**. If left blank, the current date will be used.
- 7** Do not check of the **Check to Confirm Application** checkbox
- 8** Review your data and check off the **Process Refund** checkbox
- 9** Click **Save**

▼ Resident Information			
First Name	Nicolas	Last Name	Marzano
Community	iaRetirement - Oshawa	Suite	202
▼ Specify Application Details			
Specify Invoice to Apply	a1kA0000000hC6P 		
Specify the Resident Transaction to Apply	5532 		
Enter Amount to Apply If left blank the maximum will be applied	500.00		
Specify Date to Apply. If left blank the current date is used	7/23/2013 [7/23/2013]		
CHECK TO CONFIRM APPLICATION!	<input type="checkbox"/>		
Process Refund	<input checked="" type="checkbox"/>		