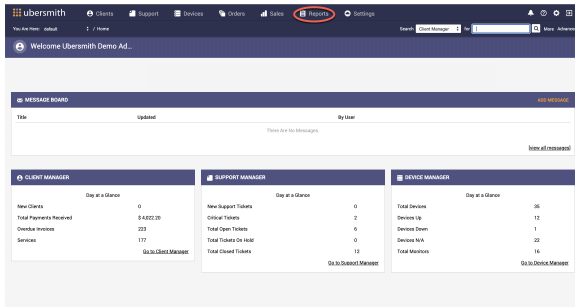


Viewing Refunds

The *Refunds* report lists and totals refunds to your clients, filterable by date ranges for the current year. If accessed from the *Report* menu for a specific client, the report is drilled down to that client.

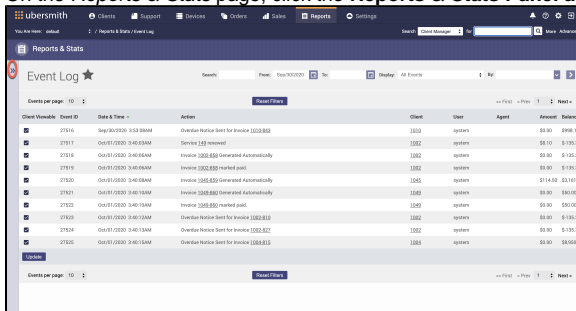
Accessing the Refund Report

1. From the *Ubersmith Dashboard*, click **Reports**.

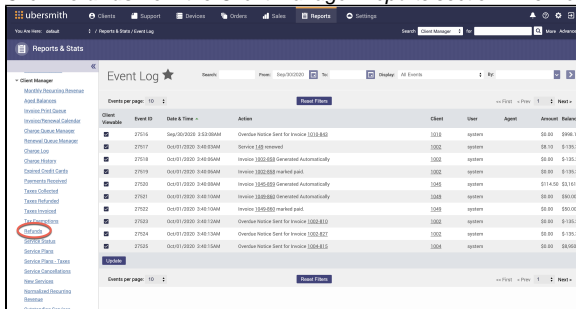


The *Reports & Stats* page appears.

2. On the *Reports & Stats* page, click the **Reports & Stats Panel** arrows to toggle the panel on.



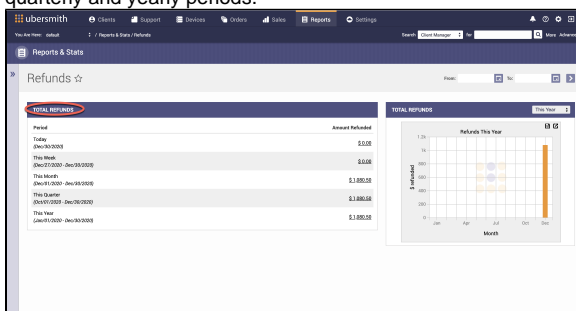
3. Click **Refunds** from the *Client Manager Reports* section. The *Refunds* report appears.



Reading the Refunds Report

Once you access the *Refunds* Report, you will see several ways to view refunds issued to your clients.

- The *Total Refunds* section lists refunds broken down by the current daily, weekly, monthly, quarterly and yearly periods.



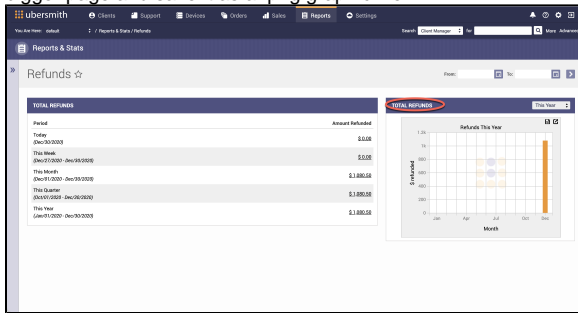
- The *Total Refunds Graph* section shows you how many current refunds you have by a specified time period. You can select the time period that displays, either daily, weekly, monthly,

On this page:

On this page:

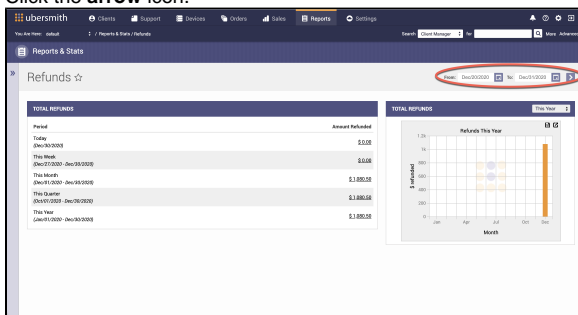
- [Accessing the Refund Report](#)
- [Reading the Refunds Report](#)
- [Viewing Credits for Specific Dates](#)
- [Viewing Details About Refunds](#)
- [Viewing Refunded Services](#)
- [Related Topics](#)

quarterly, or yearly. Once you select a certain period of time, you can display the graph in a bigger page and save it as a .png graphic file.



Viewing Credits for Specific Dates

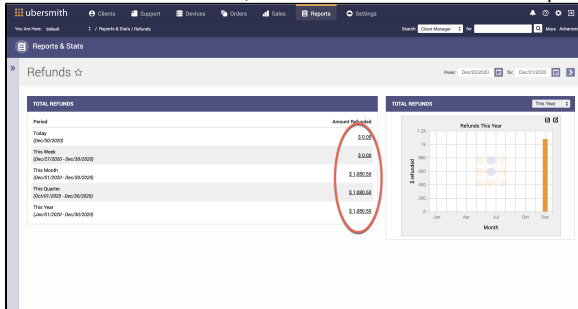
1. Access the [Refunds Report](#).
2. In the **From** field, enter the beginning date of the date range you need.
3. In the **To** field, enter the ending date of the date range you need.
4. Click the **arrow** icon.



The report with credits issued within your specified date range appears.

Viewing Details About Refunds

1. Access the [Refunds Report](#).
2. In the **Total Refund** section, click a refund link for the desired period.



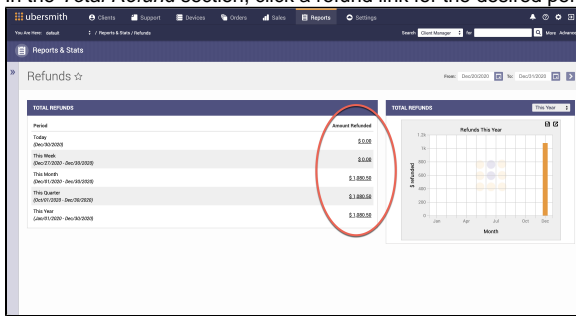
The *Refunds* page for that period displays.

3. Click on the **details** link to display the *Refund Details* page, where you can view refund details, add access the invoice.

| Refund ID | Client ID | Client | Date | Invoice ID | Order ID | Amount | User | Agent | CHF | CHF2 |
|-----------|-----------|----------------|----------|------------|----------|-----------|------------|------------|------|------|
| 15 | 1002 | Bowl Insurance | 7/6/2019 | 1002002 | - | \$ 400.00 | domacchini | domacchini | | |
| 16 | 1003 | Comet & Co. | 7/6/2019 | 1003003 | - | \$ 400.00 | domacchini | domacchini | 3495 | 2145 |

Viewing Refunded Services

1. [Access the Refunds Report.](#)
2. In the *Total Refund* section, click a refund link for the desired period.



The *Refunds* page for that period displays.

3. Click **Services Refunded**.

The screenshot shows the 'Services Refunded' page. It has a sidebar with navigation links. The main content area has a 'SUMMARY' section with a table showing: Total Refunds (1), Total Refunded (\$114.50), Total Payments (1), and Total Refunded (\$114.50). Below this is a table of refunded services with columns: Refund ID, Client ID, Client, Date, Invoice ID, Credit ID, Amount, User, Agent, OFF, and CMP. A red circle highlights the 'Refund' link for the period 'This Quarter'.

The *Services Refunded* page for the period displays.

4. Click the **Service #** link to display the *Service Details* page, where you can view the service and all its related information.

The screenshot shows the 'Service Details' page. It has a sidebar with navigation links. The main content area has a 'SERVICES REFUNDED SUMMARY' section with a table showing: Total Number of Services Refunded (2), Total Refunded (\$110.00), and Total Tax Refunded (\$4.50). Below this is a table of refunded services with columns: Service #, Description, Product Code, Date Range, Invoice #, Client Name, Refund Date, Payment Type, Transaction ID, Refund Amount, Tax Amount, OFF, and CMP. A red circle highlights the 'Service # 201' link.

Related Topics

[Issuing Refunds](#)