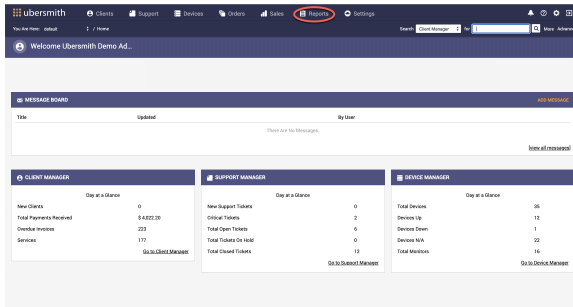


Viewing Refunds

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.

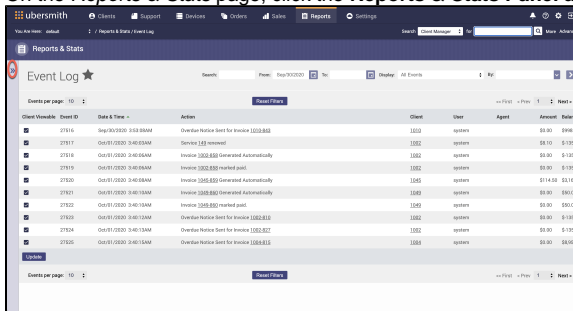
Accessing the Refund Report

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

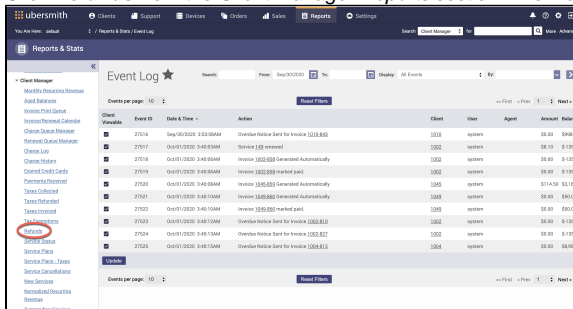


The *Reports & Stats* page appears.

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



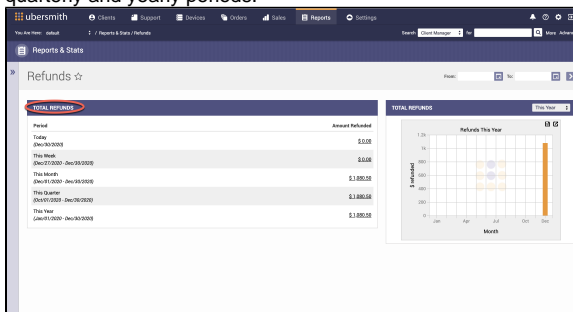
3. Click **Refunds** from the *Client Manager Reports* section. The *Refunds* report appears.



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.



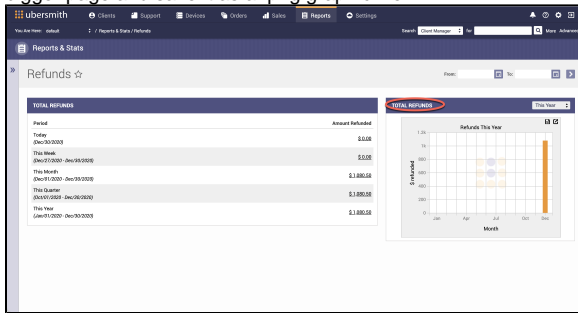
- The *Total Refunds Graph* section shows you how many current refunds you have by a specified time period. You can select the time period that displays, either daily, weekly, monthly,

On this page:

On this page:

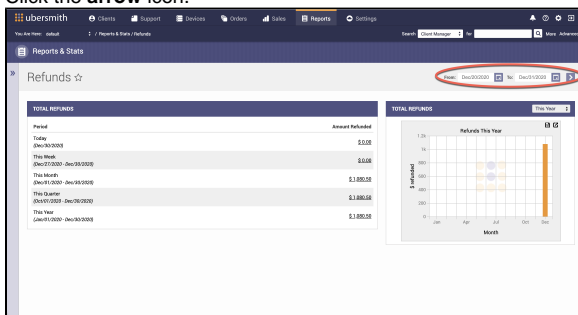
- [Accessing the Refund Report](#)
- [Reading the Refunds Report](#)
- [Viewing Credits for Specific Dates](#)
- [Viewing Details About Refunds](#)
- [Viewing Refunded Services](#)
- [Related Topics](#)

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

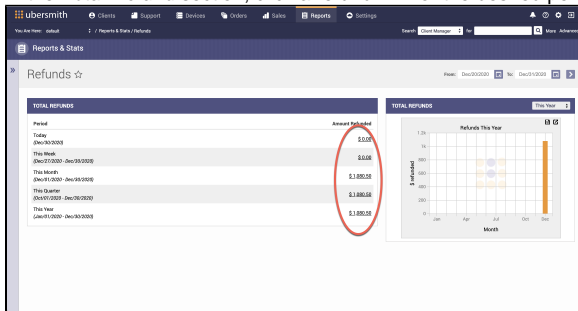
1. Access the [Refunds Report](#).
2. In the **From** field, enter the beginning date of the date range you need.
3. In the **To** field, enter the ending date of the date range you need.
4. Click the **arrow** icon.



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.



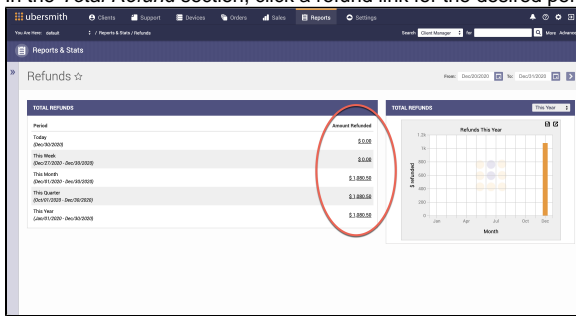
The *Refunds* page for that period displays.

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	DPH	CMF
15	1002	Bowl Insurance	7/6/2019	1002002	-	\$ 400.00	domacchini	domacchini		
16	1003	Contract Costs	7/6/2019	1003003	-	\$ 100.00	domacchini	domacchini	3495	2345

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**.

Refund ID	Client ID	Client	Date	Invoice ID	Credit ID	Amount	User	Agent	OPP	CMF
19	1385	OSUs Solutions	4/30/2021	1385-588	-	\$114.50	demarcus	demarcus		

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.

Service #	Description	Product Code	Date Range	Invoice #	Client Name	Refund Date	Payment Type	Transaction ID	Refund Amount	Tax Amount	OPP
201	Network Monitoring (NMON)	NMON	Dec/27/2020 - Jan/03/2021	1385-588	OSUs Solutions	Jan/06/2021 4:02:11 PM	Check		\$114.50	\$4.48	

Related Topics

[Issuing Refunds](#)