
What's the right way to handle refunds?

Posted by ChrisAustin - 2008/11/25 10:49

Hi folks,

I'm hoping some folks can shed some light on how to properly handle refunds within InfusionSoft. I've found it to be incredibly complex and confusing.

First of all, I can see that I can go into an order and refund a card. I understand the difference between void and refund. But this whole notion of providing a credit is just plain strange. If I select the option to provide a credit, (See attached picture 1) it gets back to a zero balance, but basically it still looks like the customer keeps the product. (See attached picture 2) And in reports, it still looks like I sold that product. Why doesn't InfusionSoft just record that the product has been returned and the money given back?

I have a customer that is requesting written confirmation of a refund and the credit that is on here makes it all very strange. Perhaps I should eliminate the credit?

My primary concern today is the financial side of this, but another concern is the fact that I would have to manually pull people out of various follow-up sequences and change tagging to really make sure that the customer does not get treated the same way that other (non-refunded) customers get treated.

To summarize, does anyone have a specific process for doing a refund? Some guidance on when to issue the credit and when not to? Thanks in advance!

-Chris Austin <http://community.infusionsoft.com/images/fbfiles/files/RefundCreditOnInvoice.png>
<http://community.infusionsoft.com/images/fbfiles/images/RefundWizard.png>

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Re:What's the right way to handle refunds?

Posted by ChrisAustin - 2008/11/25 10:54

Here's the second screenshot. This bulletin board is configured to allow pictures up to 1024 high by 768 wide. If anything, it should be the reverse of that for a standard screen resolution!

Anyway.... here it is, shrunken down a bit...

Along with a picture showing the strange limits on picture resolutions.

-Chris <http://community.infusionsoft.com/images/fbfiles/files/imagelimits.png>
<http://community.infusionsoft.com/images/fbfiles/images/RefundCreditOnInvoice.png>

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Re:What's the right way to handle refunds?

Posted by djbbiz - 2008/11/26 08:17

I agree it looks weird. The whole accounting function within Infusionsoft looks like it was written by a non-financial person. They really need to get a linked up interface with Quickbooks and allow the accounting experts to do what they do best and Infusionsoft can do what they do best.

I had a subscription product on my site that someone tried to pay with paypal the other day and use a Promo discount code. Problem is, as you are aware that the software does not have an interface with Papal yet for subscriptions. Who knows why as it is much less complicated than many things they do but they give you an option to shut off Paypal if your product is a subscription. I forgot to shut it off and a client tried to use it with the discount promo code. I now have a sales report showing no charge but a \$25 credit for the promo code which did get recorded in Infusionsoft. If it bounced the charge due to error it should have bounced the credit as well. Although it has no cash effect your book numbers are off and require correction. Just sloppy code by developers that are not accountants and no real testing of all the things that can go wrong with the system.

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