

Understanding Refund options

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On the Transactions screen (Sales & Transactions >> Transactions), when you select options like "refund and unsubscribe" it does exactly as it says... It refunds and unsubscribes the person. If you do not wish to refund them or mark their transaction as refunded in your sales reports don't use transaction functions to unsubscribe them.

(See: Unsubscribing a client without refunding - http://support.nanacast.com/index.php?_m=knowledgebase&_a=viewarticle&kbarticleid=252)

"Mark as refund and unsubscribe" does NOT refund them. It does however mark the record as refunded so that sales totals and commissions are adjusted in the Nanacast system as if it had been refunded. The purpose of this option (one of many in the drop down when managing a transaction) is to allow you to update your sales records and reverse commissions associated with sales that you may have manually refunded offline or via a non automated method.

"Refund and unsubscribe" will refund credit card payments but will only refund PayPal payments if you have the API settings in your Nanacast profile configured. Please note however that "refund and unsubscribe" only unsubscribes them in Nanacast and IF you are using PayPal for recurring payments you should instruct the customer to cancel their subscription in their PayPal account or you will need to look up the active subscription in your PayPal account and cancel it for them. This is because PayPal limits its API handling refunds so we cannot remotely cancel a subscription in PayPal. For this reason it's best to simply instruct a customer how to cancel a subscription in PayPal if you are using PayPal Standard.

(See Using Advanced PayPal Settings to do PayPal Refunds in Nanacast - http://support.nanacast.com/index.php?_m=knowledgebase&_a=viewarticle&kbarticleid=235)

Most of all keep in mind that merchant account processing is the recommended method for payment processing for recurring subscriptions for many reasons, including ease of management from within your Nanacast account, and the ability to change on the fly or even rotate (load balance) merchant accounts right inside of your Nanacast account.

If a person is subscribed via a credit card payment you have the option of directing them to login to a Nanacast hosted membership area, or directly through the Nanacast home page to access "purchases and subscriptions", where they can use the one click cancel option for subscriptions.

Finally, the "Void" options are used when you wish to cancel a very recent merchant account

transaction. After a charge has been authorized, it can take several hours before the charges have been "settled" between the merchant account gateway and the client's bank/card provider. A refund (credit) action will not succeed until after the charge has been settled. In this scenario, you use the "Void" options to cancel the charge.Â