

How to issue a refund for a customer in SquareUp dashboard

| 1 Navigate to <u>h</u> | ttps://squareup.com/dashboard/customers/directory/all |
|------------------------|--|
| | |
| 2 Click the "Sea | rch" field. |
| Directory | SQUARE TEXT MESSAGE MARKETING |
| Feedback | New: Send text campaigns with images to make your brand stand out. |
| Insights | Try it out |
| Settings ∽ | Q Search |
| | Group: All customers ➤ ● 4 Duplicate Suggestions > 75,733 total customers in your directory |
| | Roups help you organize your customers into segments, often by identifying si |

| 3 | Type | "mickey | nelson" |
|---|---|---------|---------|
| - | .,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,, | mencey | |

| 4 Clic | ck here. | |
|--------|--|---|
| | Group: Filtered results ~ 1 total customer in your directory | |
| | 😤 Groups help you organize your cu | tomers into segments, often by identifying similar traits. Use t |
| | Name ^ | Email |
| | Mickey Nelson | teamnelson15@ |
| | | |
| | | |
| | | |
| | | |
| 5 Clic | ck here. | |
| | | Manually added 20 cookie coins. Reason: Order #98ca65f0-46a7-4d26-94e2- ec24345bb796 Tue, Dec 19, 2023, 10:30 am |
| | | \$22.73 Purchase Tue, Dec 19, 2023, 10:18 am |
| | | \$32.87 Purchase Tue, Dec 19, 2023, 9:03 am |
| | | Show more |
| | | Additional Information |
| | | |

Click this icon.

| < ମୁ ଦୁ 📑 ଡ | Crave Cookies - Mesa, |
|---|-----------------------|
| Send Receipt | ···· |
| \$32.87 Payment | |
| Dec 19, 2023 9:03 am Collected at: Crave Cookies - Mesa, AZ | |
| Order Source: GoParrot Sale attributed to: Untracked team member Paid by: Mickey Nelson | |
| Six Pack | \$20.99 |
| Red Velvet Oreo | \$0.00 |

| 7 Click "Issue Refund" | | |
|------------------------|--|-------------------------|
| | Q Q P 🗐 🤅 |) Crave Cookies - Mesa, |
| | | |
| | Send Receipt | ••• |
| | | Issue Refund |
| | \$32.87 Payment | Edit Customer |
| | Dec 19, 2023 9:03 am | Attach a contract |
| | Collected at: Crave Cookies - Mesa, AZ Order Source: GoParrot | |
| | Sale attributed to: Untracked team member | |
| | Paid by: Mickey Nelson | |
| | | |
| | Six Pack | \$20.99 |
| | Red Velvet Oreo | 00.02 |

Made with Scribe - https://scribehow.com

8 Click "Items"

| Clave Cookles - Mesa, AZ | | |
|--|--|---|
| - Mesa, AZ | Refund Items | Refund Amour |
| Crave Loaded Soda Favorites – Collected by Trent English C | | |
| | Select Items to Refund | |
| by Trent English Crave Cookies - Mesa, AZ | Item amount includes taxes and discounts, | if applicable. |
| | Team member commission earned from the | e original sale will not be cha |
| | Items | |
| - Mesa, AZ | Six Pack | |
| /lesa, AZ | (\$20.99), Red Velvet Oreo (\$0.00) Cocoa (\$0.00), Holiday M&M |), Peppermint Hot (\$0.00), The Grinch |
| - Mesa, AZ | (\$0.00), Loaded PBN (\$0.00), Milk | Chocolate Chip |
| | Delivery fee | |
| | | |

9 Click "Refund Items"

Click this dropdown.

| Refund to | MasterCard 7003 | |
|-------------------|-----------------|--------------|
| Amount | \$32.87 | |
| Add Gift Card | | |
| Reason for refund | Select a reason | ~ |
| | | Issue Refund |
| | | |

Click this dropdown.

| Refund to | MasterCard 7003 | |
|-------------------|-------------------|------|
| | | |
| Amount | \$32.87 | |
| | | |
| Add Gift Card | | |
| | | |
| Reason for refund | Accidental charge | ~ |
| | | |
| | Issue Ref | fund |
| | | |
| | | |
| | Select a reason | |
| | Accidental charge | _ |
| | Canceled order | |
| | Fraudulant Charge | |

12 Click here.

| Balance, d account. | or, if those funds are unavailable, the bar | nk account | | |
|------------------------|---|--------------|--|--|
| | MasterCard 7003 | | | |
| | \$32.87 | | | |
| | | | | |
| | | | | |
| | Accidental charge | ~ | | |
| | | Issue Refund | | |
| | | | | |
| | | | | |

13 Click "Issue Refund"

| | \$32.87 | |
|-------|-------------------|--------------|
| d | | |
| efund | Accidental charge | ~ |
| | | Issue Refund |
| | | |
| | | |
| | | |