Changing Registrations

Types of Changes

- Non-Financial

  Change the registration, but not the invoice

- New trip price will not be paid in full.
  1. Change the registration
  2. Update the invoice
  3. Email the updated invoice to the registrant

- New trip price will be overpaid.
  1. Change the registration
  2. Update the invoice - payments settlement will be removed
  3. Manually settle payments
  4. Email the updated invoice to the registrant
  5. Refund or transfer the remaining credit in WA and with an IET to the Treasurer

Non-Financial

1. Find the registration in the Registrants List.
2. Click on the registration to view the details
3. Click “Edit”
4. Make the change and click “Save”
5. Now you see the invoice. Click “Cancel invoice update”

New trip price will not be paid in full.

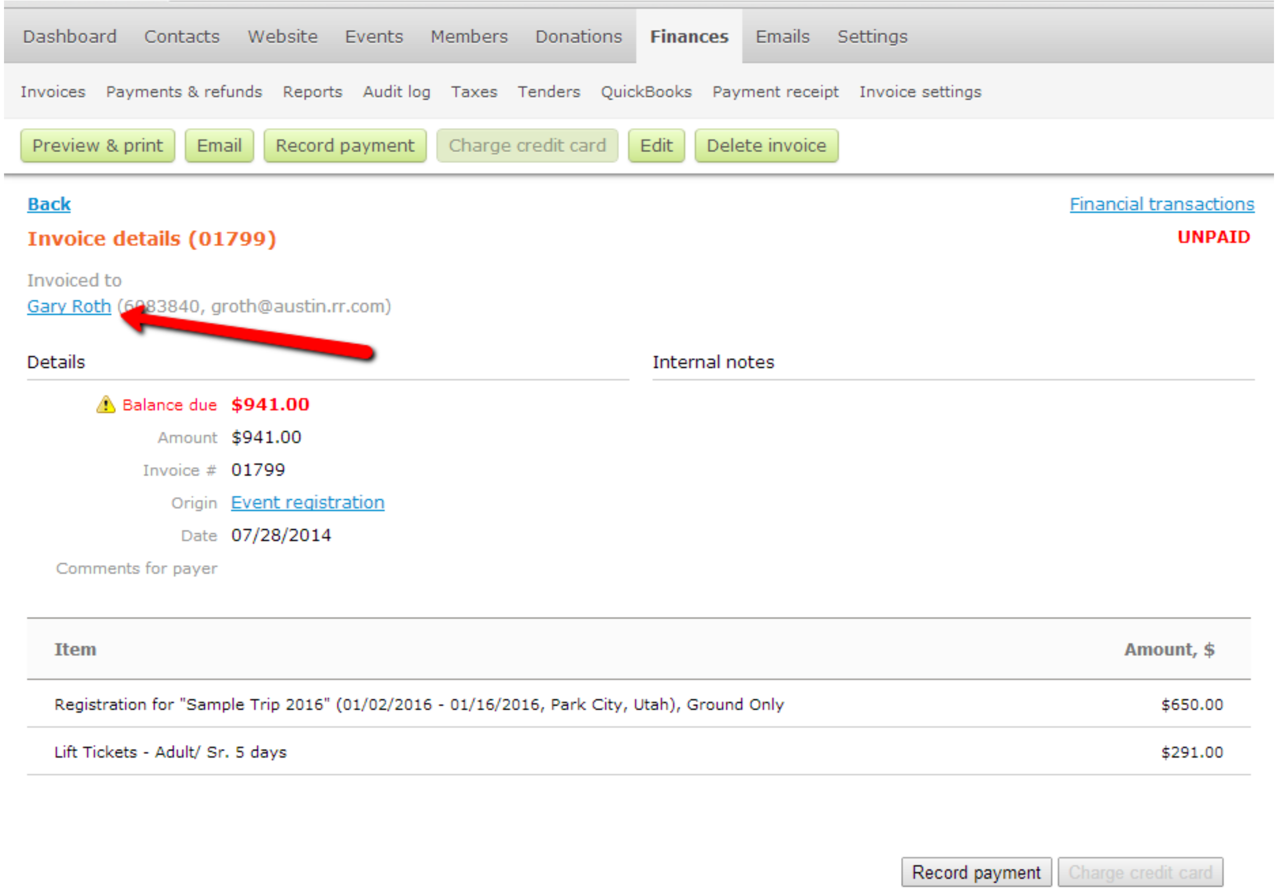
1. Find the registration in the Registrants List.
2. Click on the registration to view the details
3. Click “Edit”, make the change and click “Save”
4. Now you see the invoice. Click the green “Update invoice” button near the top left.
5. Click the green “Email” button near the top of the page.
6. Type a “personal message” to the registrant and click the green “Send email” button.

New trip price will be overpaid.

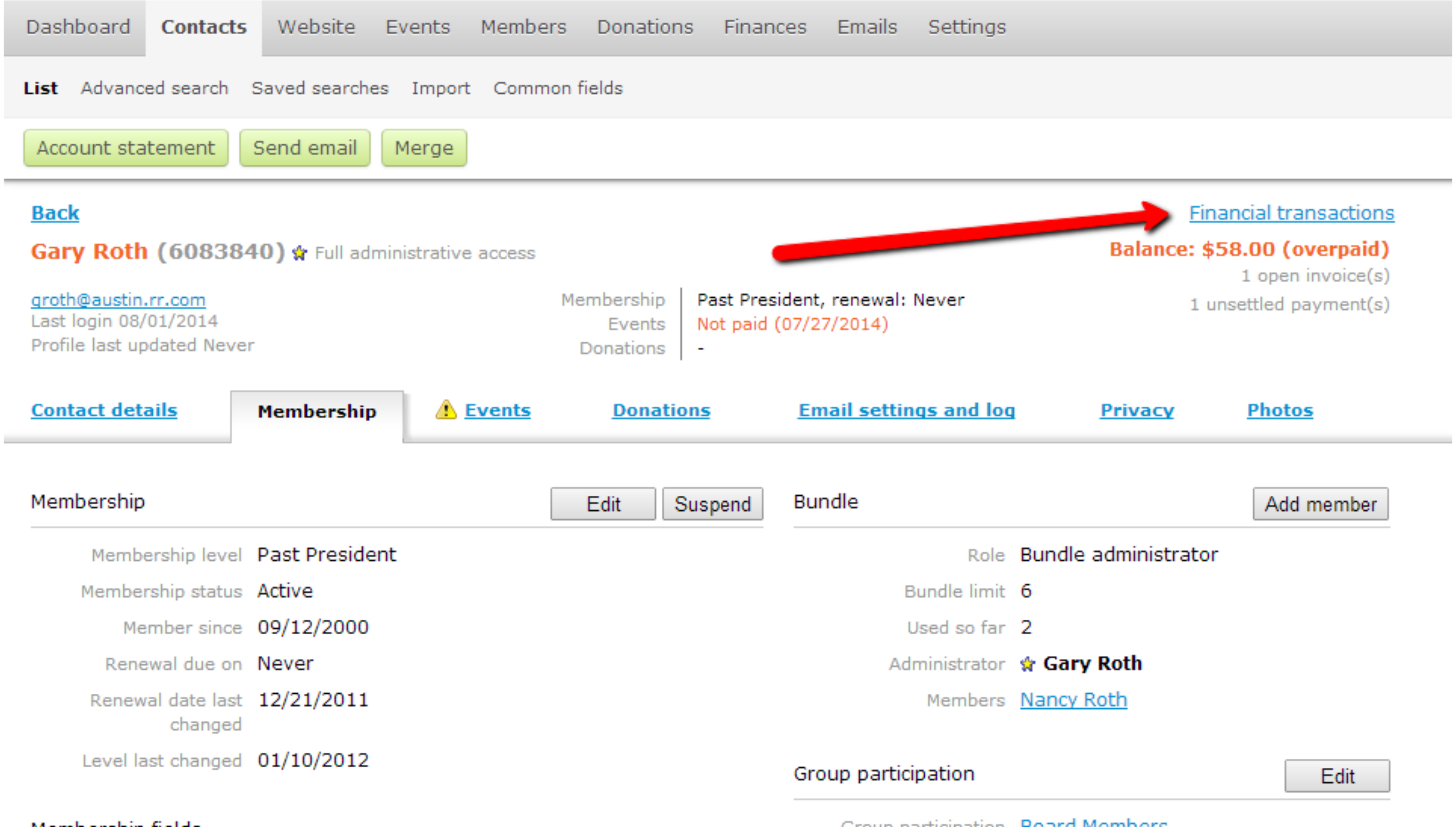
1. Find the registration in the Registrants List.
2. Click on the registration to view the details
3. Click “Edit”, make the change and click “Save”
4. Now you see the invoice. Click the green “Update invoice” button near the top left.
5. Since the payments exceed the new total invoice, WA will show a message that the settlement will be removed, click “OK
6. The payments have been separated from the invoice for the trip. You have to find the payments and manually settle them.

This rest of the steps will be covered in more detail on the following slides.

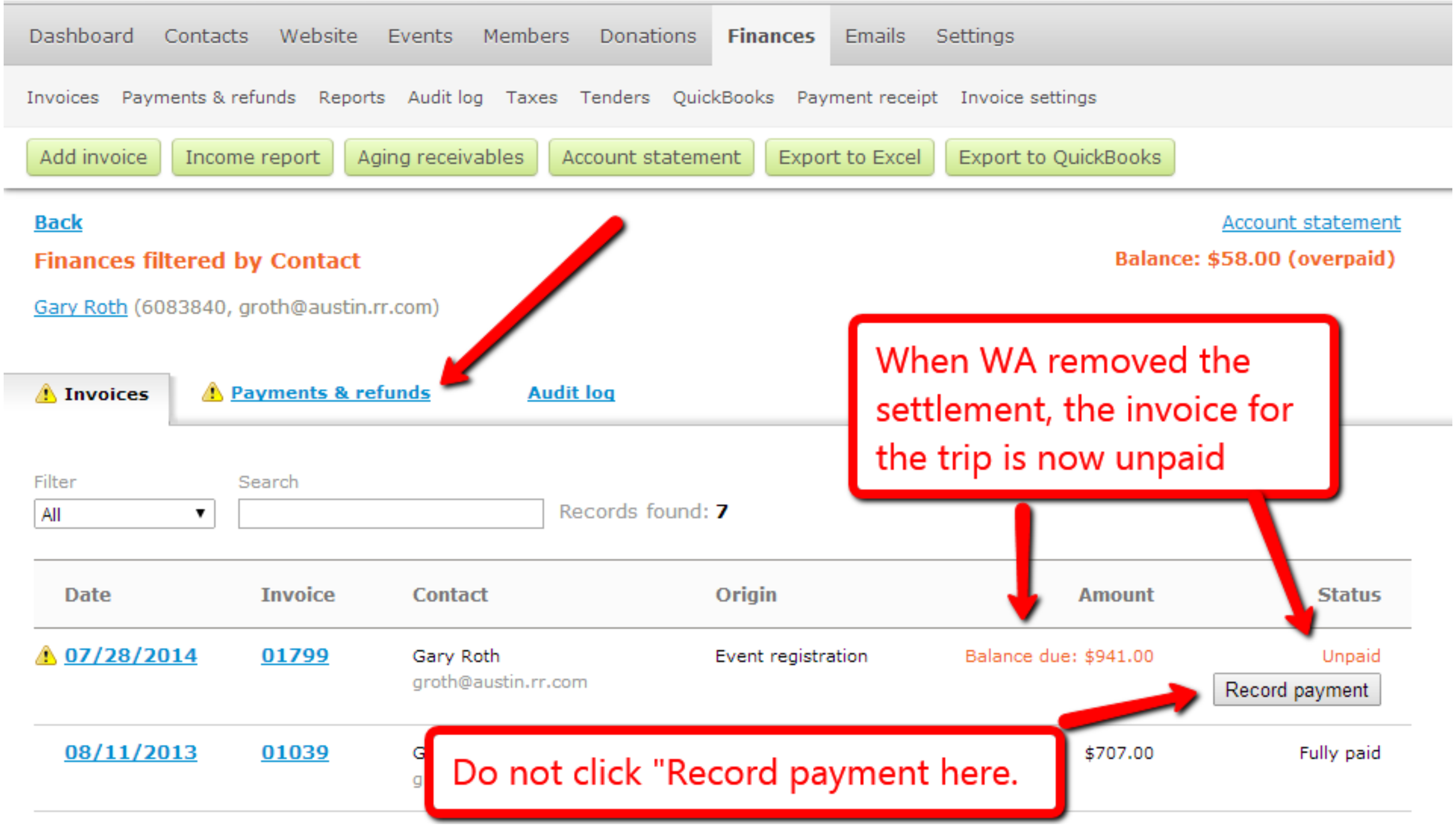
On the invoice - click on the registrants name



On the registrants Contact info page, click on Financial Transactions

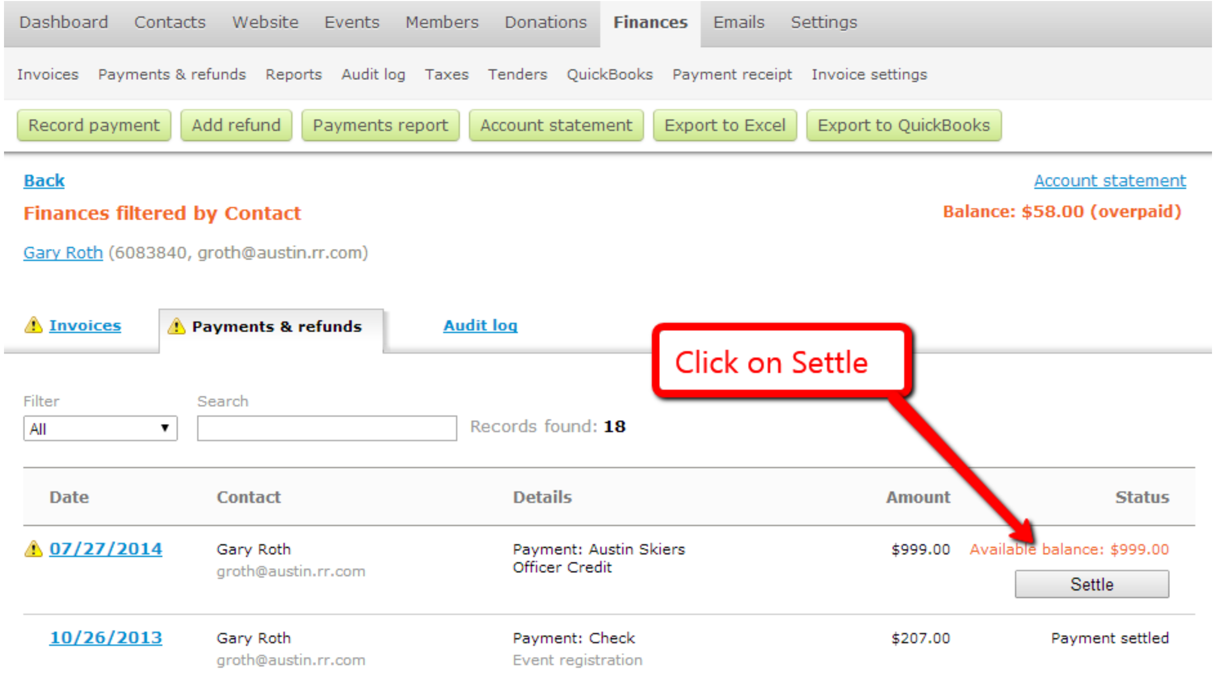


On the Invoices list, click on Payments & refunds



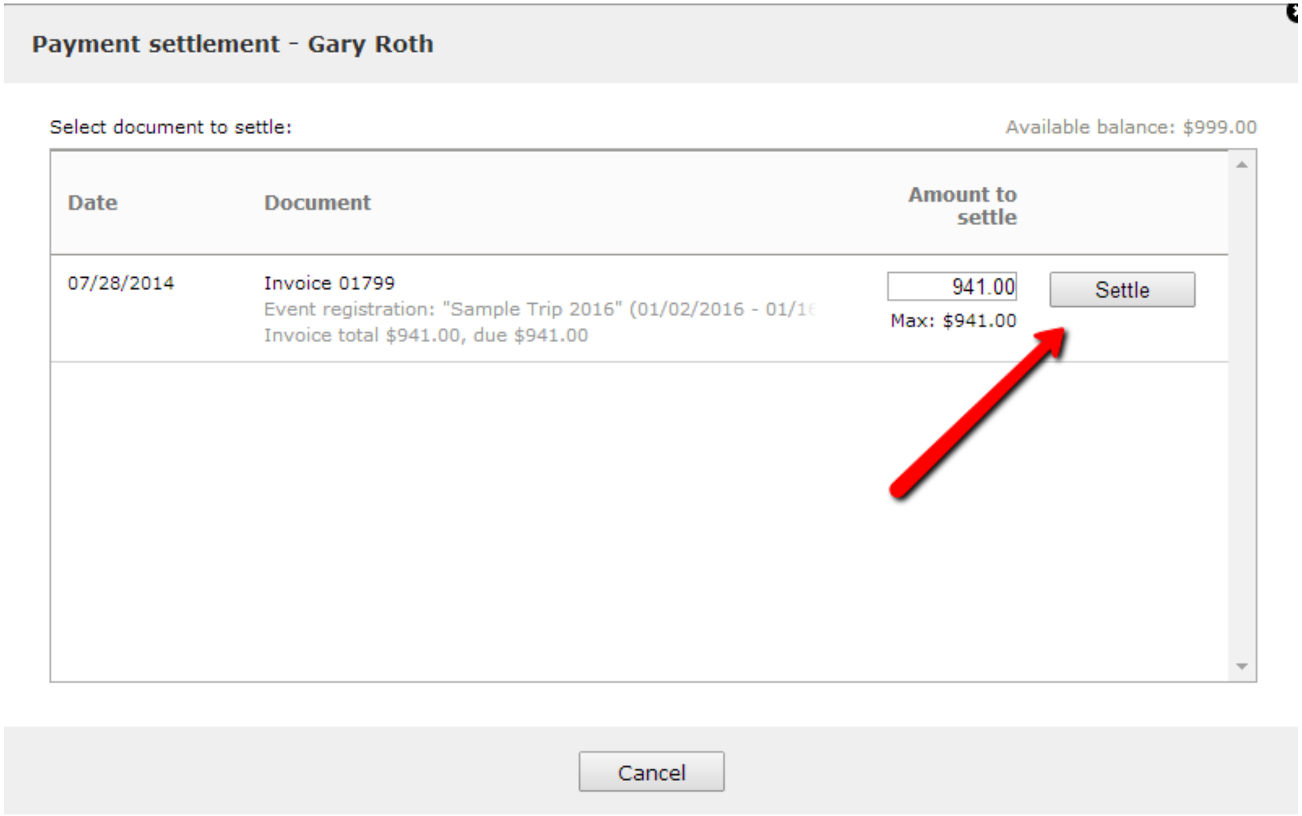
On the Payments & refunds list - settle the payments with available balances

In the following example there is only 1 payment for the full amount of the trip. Normally there are at least 2 payments, the deposit and then one or more additional payments. Settle the smallest ones first.



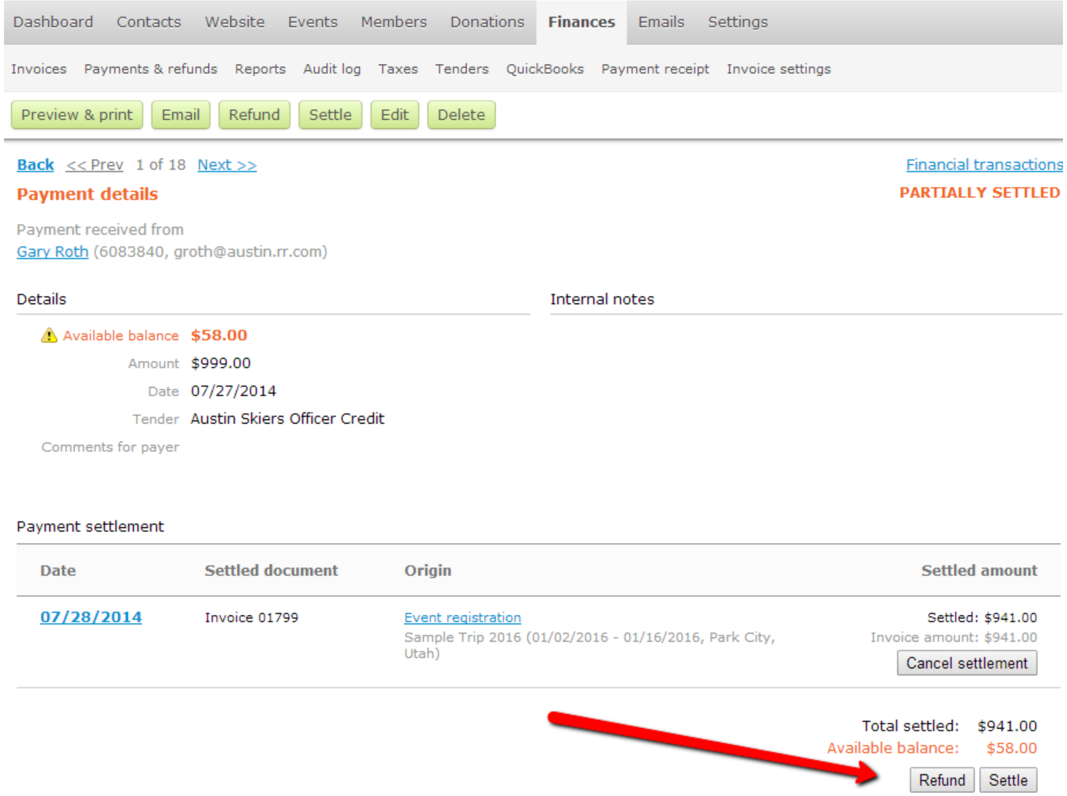
Payment settlement window - repeat this process for the 2nd payment

If there are unpaid invoices from other trips, be sure to “settle” the one from your trip.

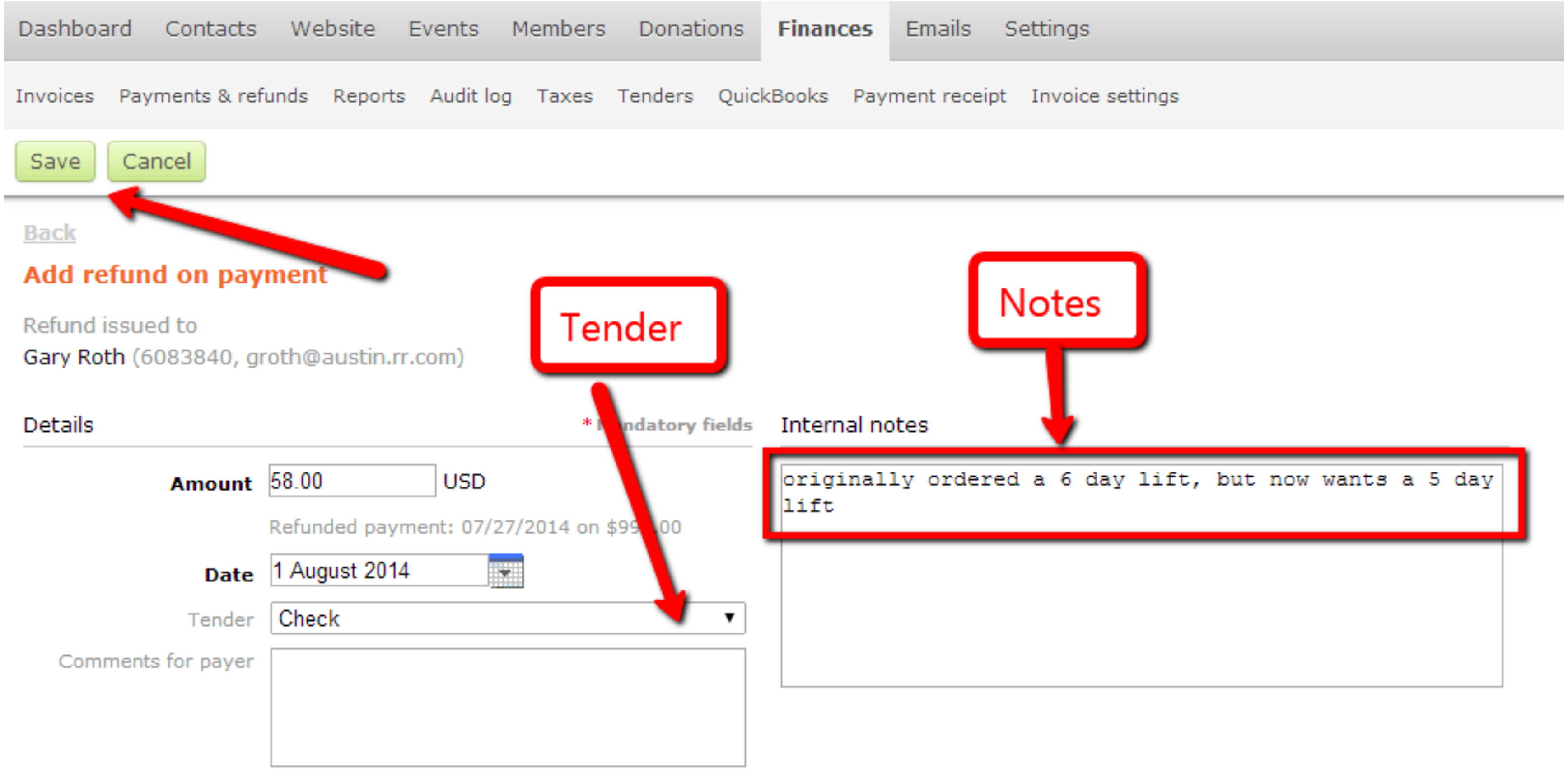


Refund the remaining available balance - click the refund button

If you don’t do the refund in WA, then the registrant will have a credit they don’t deserve



Add the refund - choose tender, add notes, click the green Save button



Email the Refund details and complete an IET

Click on the green Email button and enter a Personal message

Email the IET to the VP Trips (trips@austinskiers.org) and the Treasurer (treasurer@austinskiers.org)

Ask the VP Trips to approve the IET

Note: All refunds to trip registrants must be approved by the VP Trips.

You are Done!