Cvent, Standard | How to refund [1]

August 1, 2018 by (not verified) [2]

Managing money is hard enough without having to worry about giving it back. By creating a full refund policy, registrants who made an online payment will automatically be refunded the entire purchase amount if they cancel their registration, saving you an extra step. Unfortunately, you'll still need to refund registrants that paid offline the old fashioned way.

Refund Policy

Don't forget! On your event, clearly explain your refund policy and what they should see on their credit card statements [3].

OPTION I | Automatic Refund

Set up a Refund Policy in Cvent and it will automatically refund the constituent when 1) the registrant cancels their order OR 2) you cancel the order on behalf of the registrant in invitee management.

You must be logged into Cvent Help and Support in order to access tutorials.

1. Login to Cvent
2. Click the Help and Support link (top, right)
3. Once you are on the Cvent Help and Support site, you can click the button below

Automatic Refund Tutorial [4]

Cvent Tutorial Details
Cvent Tutorial ID:000002655
Cvent Tutorial URL:
https://cventhelp.force.com/apex/CommunityArticle?id=000002655&Lang=en_US [4]

OPTION II | Manual Refund

If you have NOT set up a refund policy you must manually give a refund to the canceled registrant.

You must be logged into Cvent Help and Support in order to access tutorials.

1. Login to Cvent
2. Click the Help and Support link (top, right)
3. Once you are on the Cvent Help and Support site, you can click the button below

Manual Refund Tutorial [5]

Cvent Tutorial Details

Cvent Tutorial ID:000002497
Cvent Tutorial URL:
https://cventhelp.force.com/apex/CommunityArticle?id=000002497&Lang=en_US [5]

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Refunds can NOT occur on the same day as the transaction

Due to how these transactions are reconciled, a refund cannot take place on the same day as the transaction.

Refunds must NOT Exceed 120 days

CU's payment gateway is Authorize.Net which does NOT allow a refund to process beyond 120 days post initial payment. If you try to refund an initial payment made by an invitee that took place more than the 120 days ago, the transaction will fail.

Talk to your department's finance staff to settle the refund outside of Cvent by cutting the registrant a check from the speedtype. It will likely involve going through the non-employee reimbursement process [6].

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Links
[1] https://www.cu.edu/blog/ecomm-wiki/cvent-standard-how-refund
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