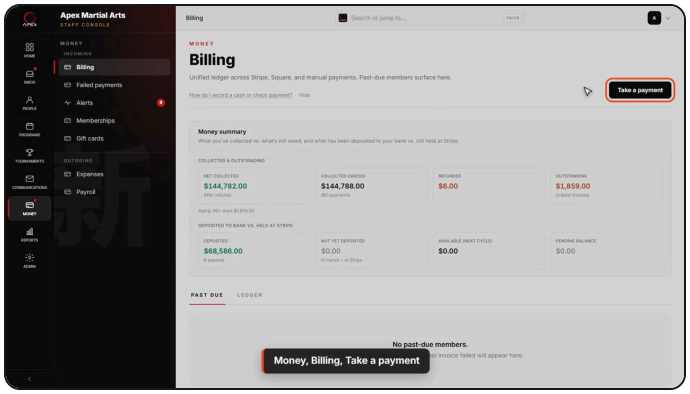
Take a payment or give a refund

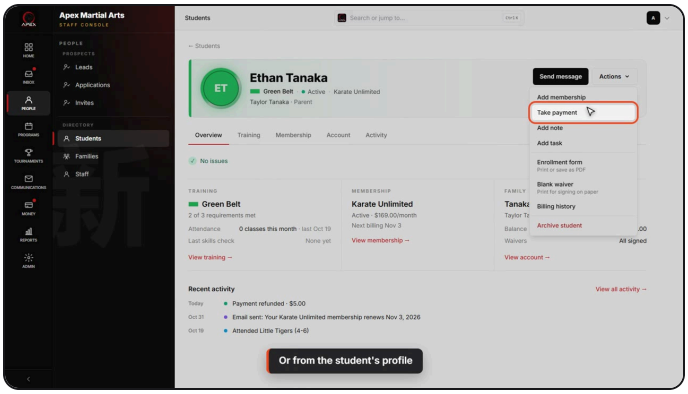
Charge a card, write down a cash or check payment, and give money back in full or in part.

18 steps



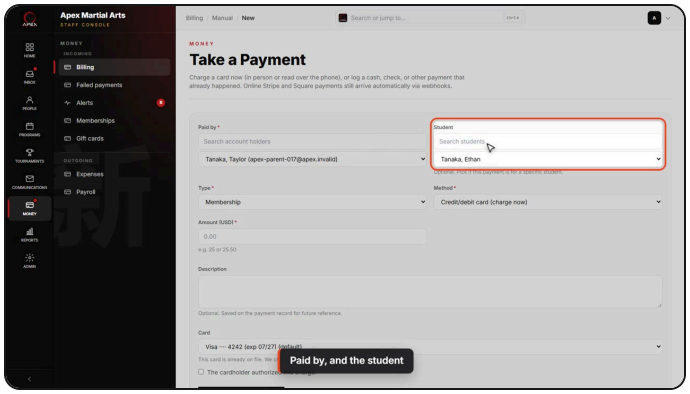
1 Money, Billing, Take a payment

To take a payment, open Money, then Billing, and click Take a payment.



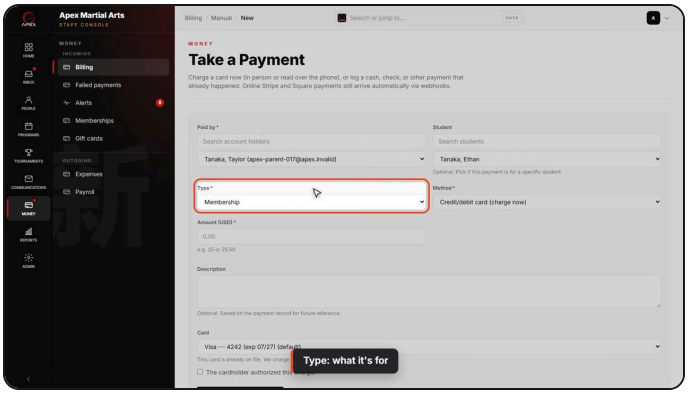
2 Or from the student's profile

Quicker still: on a student's profile, open Actions and pick Take payment.



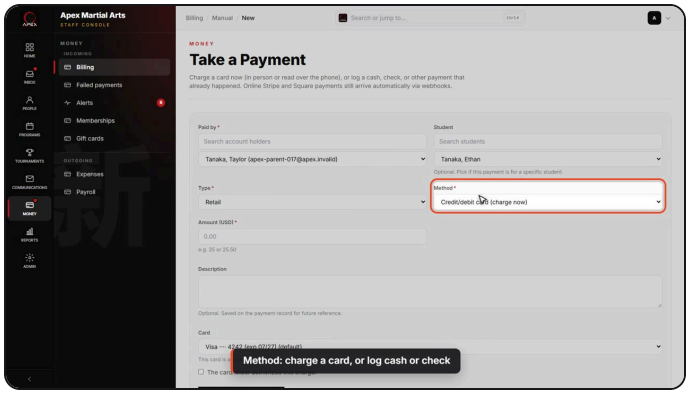
3 Paid by, and the student

The family is already filled in. Paid by is the account holder, the parent who pays. Student is optional, for a payment that belongs to one child.



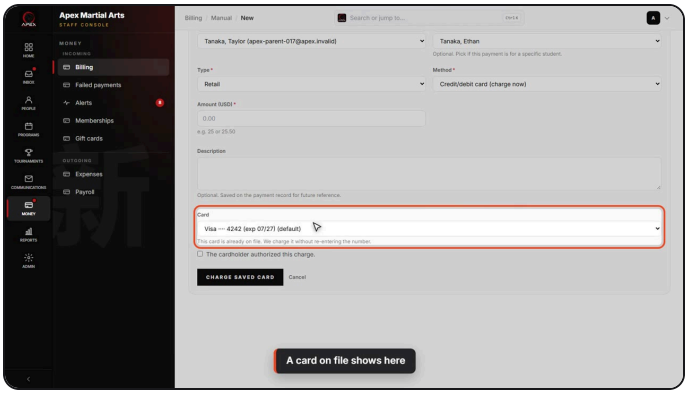
4 Type: what it's for

Type says what the payment is for: a membership, retail, an event, a test fee, a private lesson, or other. This one is retail.



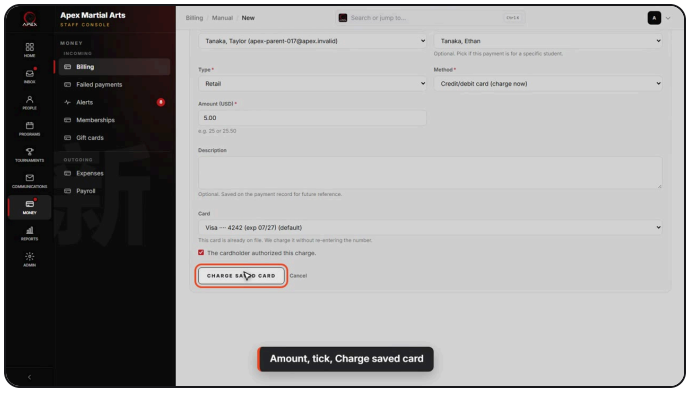
5 Method: charge a card, or log cash or check

Method matters most. Credit or debit card charges a card right now. Cash, check and other only record money you already have in hand.



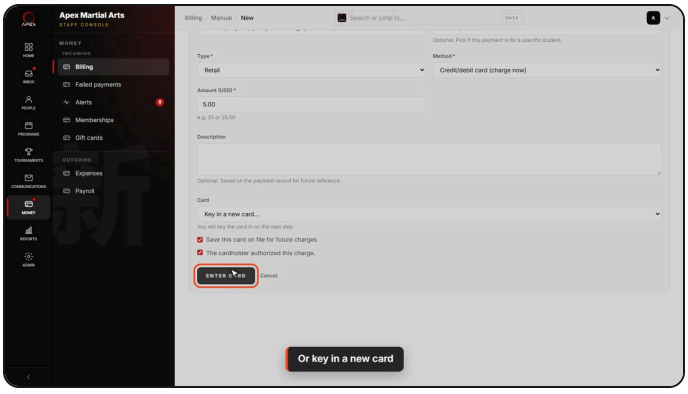
6 A card on file shows here

With card picked, a card the family already has on file shows here. We charge it without typing the number.



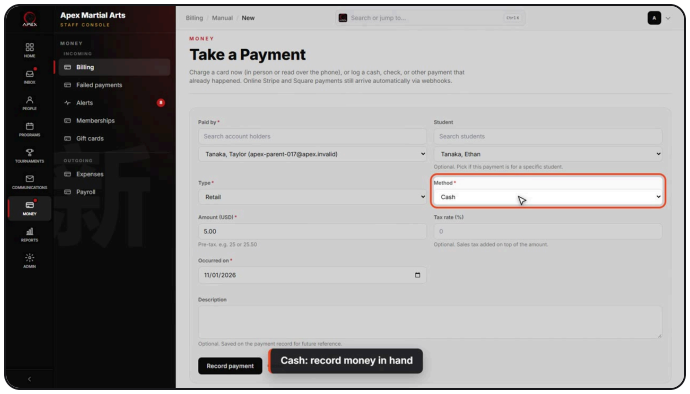
7 Amount, tick, Charge saved card

Type the amount, tick The cardholder authorized this charge, and click Charge saved card. The family is emailed a receipt.



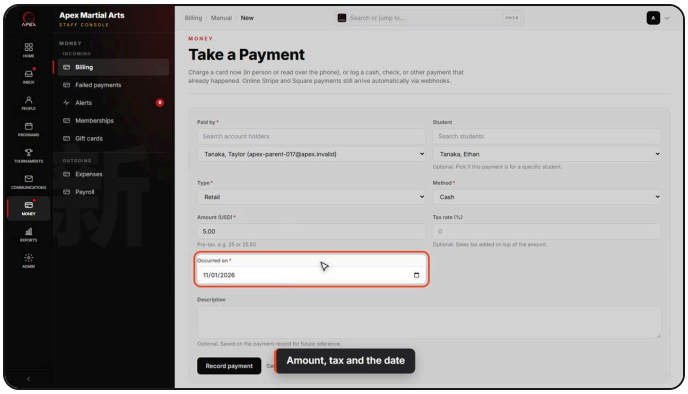
8 Or key in a new card

For a different card, pick Key in a new card. Leave Save this card on file ticked to keep it for next time, then click Enter card and type it into the secure form.



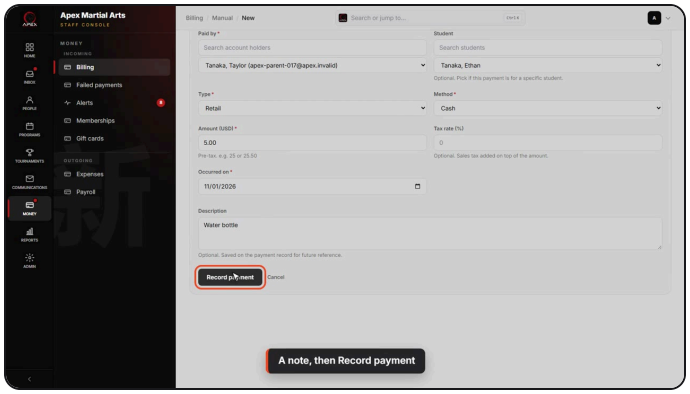
9 Cash: record money in hand

Now cash. Pick Cash as the method. A check works exactly the same way.



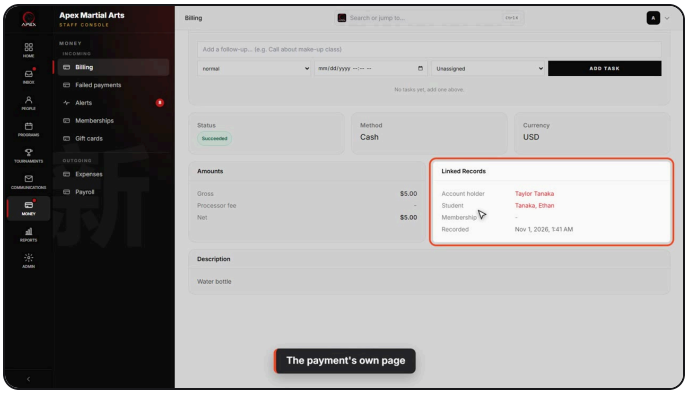
10 Amount, tax and the date

The amount is already in. Tax rate is optional, and is added on top. Occurred on is the day you took the money.



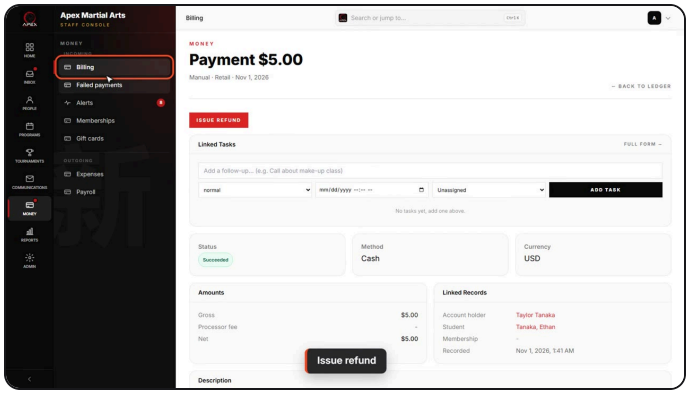
11 A note, then Record payment

Add a note if it helps, then click Record payment. Cash and check payments send the family no receipt.



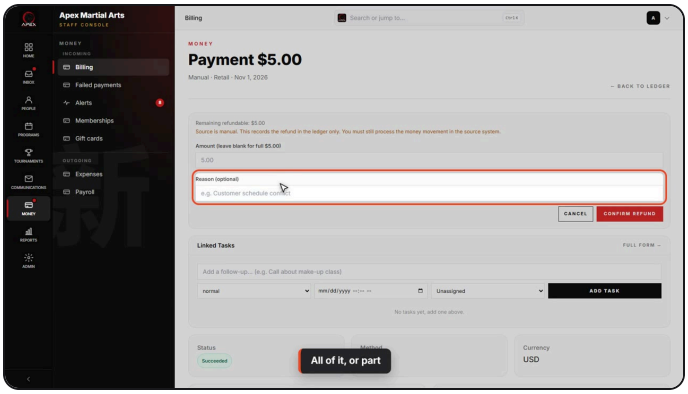
12 The payment's own page

You land on the payment's own page: the amount, how it was paid, and who paid it.



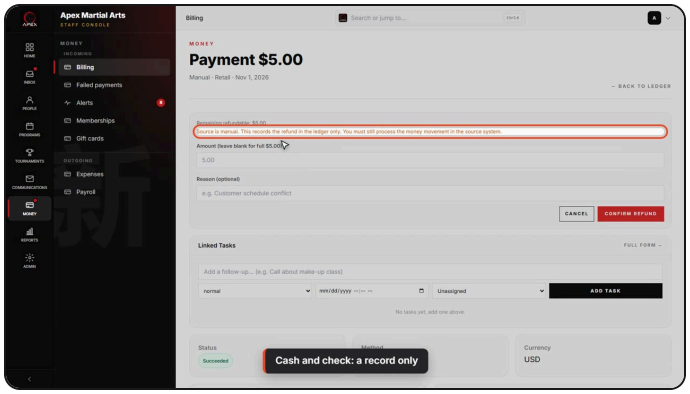
13 Issue refund

To give money back, open the payment and click Issue refund. To find a payment again, it's under Billing, in the sidebar.



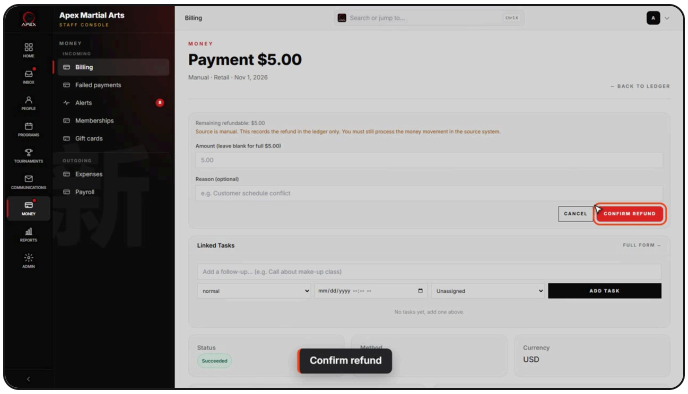
14 All of it, or part

Leave the amount blank to refund all of it, or type a smaller amount for a partial refund. A reason is optional.



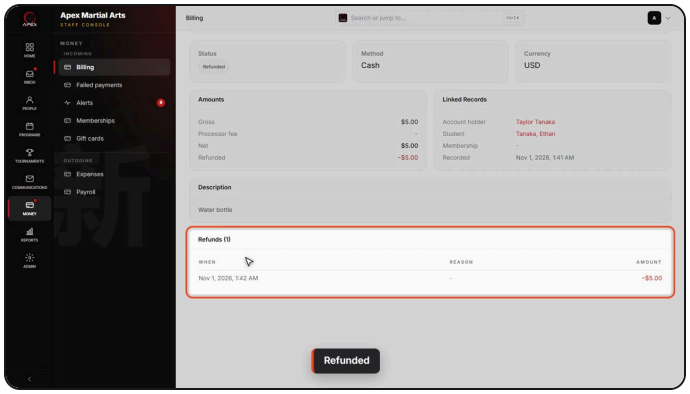
15 Cash and check: a record only

For cash or check, this only records the refund, so hand the money back yourself. For a card payment, the money goes back to the card through Stripe.



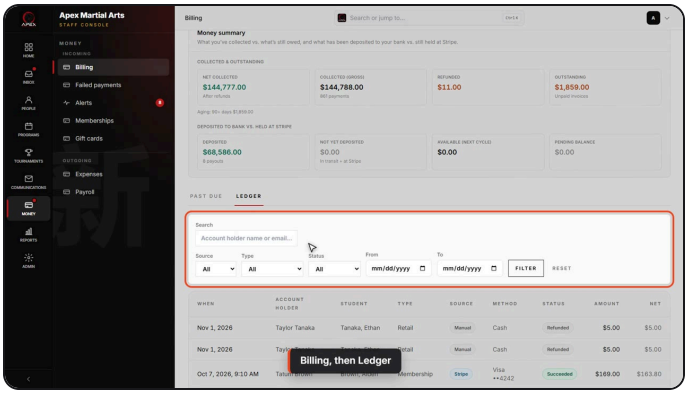
16 Confirm refund

Click Confirm refund.



17 Refunded

The payment now shows Refunded, with the refund listed underneath.



18 Billing, then Ledger

Every payment and refund is on Billing, under Ledger. Filter by source, type or status, or search for a family by name.

What happens next

1. **Next: Handle a declined card**
   Find who is past due, see what QuickKicks does on its own, retry, snooze or waive a payment, and ask the family for a new card. Watch it at quickkicks.app/learn/schools/failed-payments

Watch the video

Point your phone's camera at the code, or go to quickkicks.app/learn/schools/payments-and-refunds

Stuck?

In QuickKicks, open **Admin**, then **Support** (or **Help**, in the simpler menu), and send us a message. Or email **hello@quickkicks.app**.

Shown with a demo school. Your screens show your own school, and may look a little different.