How to Process a Refund RegOnline Using a First Data Gateway

1. Find and edit the registrant's record to open the Attendee Info. window.
2. Click the Transaction icon on the left sidebar
   - Check the amount on the Total line. The registrant must have a negative (red) balance before continuing with the refund. If the registrant does not have a negative balance, you must first cancel the registrant or if you are giving a refund for a change in the registrant's Agenda Item or Fee selections, you must first change their Agenda Items or Fees. Canceling or altering the registrant's selected fees will automatically create a negative balance for you.
3. Click the New Transaction link in the top right corner.
4. Select Online credit card refund and click Next.
5. Enter the total to be refunded in the Amount field.
6. Select Yes, process the amount above to confirm the refund.
7. Click Save & Close to process the refund.

How do I find a registrant

There are a few ways to locate an attendee in your RegOnline account. Here are a few options.

If you know which event the attendee registered for:
1. On the Events tab, click the Title of the event the attendee registered for.
2. Enter any information you have for this attendee (such as Last Name, email, or Company) in the Find Attendee in this Event field, located on the right side of the page. Click GO.
3. When the results display, you can click the attendee's Registration ID number to go directly to the complete Attendee Info for that individual.

If you do not know which event the attendee registered for:
1. On any of the main tabs (Events, Email Invitations, or Account) located the search bar in the upper right corner.
2. Select the Attendee search type.
3. Enter your search criteria.
   - Such as last name, company name, or Registration ID number in the search box to the right of the dropdown.
4. Click the Search Attendees button. The Attendee Search window will open.
5. Your results will list all attendees with the last name you specified across all Forms in your account.
6. To narrow down your search you may then click on Advanced Search link at the top of your list.
   - This will display additional search fields: Event ID, Registration ID, First Name, Last Name, Company or Email.

Additional Information:
You can also edit an attendee's record to open the Attendee Info window from any Standard or Custom report in your account by clicking on the Registration or Confirmation ID number for a given registrant.
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Cancel a Registration
In order to cancel an attendee's registration, you will have to locate and open the attendee's record in your account. Once the record is open you can click on the Cancel button at the top of the Attendee Record window.
To do so:
  1. From the Events screen, find the event and click the number in the Regs. column to run the Attendees Report.
  2. Find the attendee you want to cancel and click the ID number on that line. Their registration record displays in a new window.
  3. Click the Cancel button, located in the green header bar, near the top of the window. A window displays asking to confirm the cancellation.
     o If desired, check the box titled Send Email Notification to this Registrant.
  4. Click "Yes" to confirm that you want to cancel this registration.

See the Related Links below if there is a charge to attend your event and this attendee has already paid for their registration, since you’ll most likely need to issue a refund to the attendee.

Additional Information:
Live registrations (registrations processed while your event is active) can not be deleted. You can only delete Test Registrations (registrations processed while the event is in Testing Status).

Modify Agendas and Fees
You can modify an attendee's record after they have registered to change their Custom Field, Agenda Item, or Fee selections by editing the attendee record from your account. To do this:
  1. Find and edit the attendee’s record to open the Attendee Info window.
  2. Click on the appropriate section of the attendee’s record that you wish to modify from the right hand side.
     o Custom Fields --- Agenda & Fees --- Merchandise --- etc...
  3. Click on the Edit button in the top right corner of the screen.
  4. Make the desired changes to the attendee's record.
     o Select the new item and/or
     o Remove the old item (if applicable)
  5. Save your changes.
How to issue a RegOnline Refund

From the RegOnline event page, click “Attendees” and find the attendee to receive refund. Click on “Transactions” tab

**Transactions Tab**

- **ID 18038286**: Transaction Amount, $45.00
- **ID 18038287**: Online Credit Card Payment, $45.00
- **ID 18069311**: Credit Due to Cancellation, $45.00

**Total Balance**: ($45.00)
This window will pop up with all information included. Click “Save & Close”
Pop-up will disappear and you can see refund credited to transactions.