

How To Do Refunds

1. Find an email from a customer that's requesting a refund. Ignore most of what they say except for the refund request and if they didn't get picked up at all.
2. Look up the reservation connected with the refund request by copying (Ctrl+C) and pasting (Ctrl+V) the reservation number into the RideBits search box on the top right (7E4NWA).



3. See if the notes provide a reason for a 100% refund exception to the cancellation policy. Most cancellations are just regular refunds and you would skip to step 4 below.
 - ✓ No Driver, No Vehicle and No Lyft Available = 100% Refund
 - ✓ Driver was more than 30 minutes late, and the customer did not receive the ride.
 - ✓ Duplicate Reservation with the same customer, date, time and addresses.
 - ✓ Business Travel – paid the extra amount to be able to cancel for free if the driver isn't en route.
 - ✓ No confirmation email was sent to the customer, and the customer did not receive the ride.
 - ✓ The price changed more than 25% due to some kind of software glitch or human error, and the customer canceled at least 4 hours ahead of time.
4. Look at the email history on the right side and find the 1st cancellation email sent.

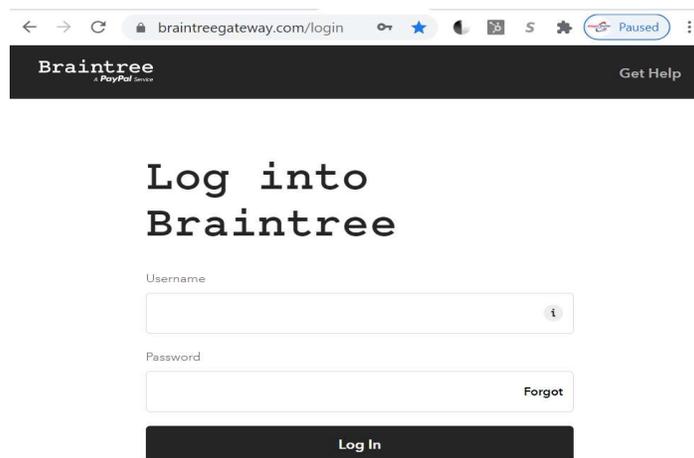
Type	Reservation
Order status	Cancelled
Order source	Web
Date created	11/9/2021 11:05 am

Emails (9)	
To:	deb4travel@gmail.com
Sent at:	11/9/2021 12:20 pm
Subject:	Cancelled - 7E4NWA For Sat - Nov 27 2021 10:30 AM - Reschedule When You're Ready or Read Below
To:	deb4travel@gmail.com
Sent at:	11/9/2021 11:20 am
Subject:	Updated Confirmation - 7E4NWA For Sat - Nov 27 2021 10:30 AM - 24/7 Shuttle, SUV or Sedan
To:	deb4travel@gmail.com
Sent at:	11/9/2021 11:12 am
Subject:	Confirmed - 7E4NWA For Sat - Nov 27 2021 10:30 AM - 24/7 Shuttle, SUV or Sedan
To:	deb4travel@gmail.com
Sent at:	11/9/2021 11:11 am
Subject:	Confirmed - 7E4NWA For Sat - Nov 27 2021 10:30 AM - 24/7 Shuttle, SUV or Sedan

5. Compare the date and time the cancellation email was sent (Sent at: 11/9/2021 12:20 pm) to the date and time of the pickup (Nov 27 2021 10:30 AM).

- ✓ > 48 Hours = 70% Refund (The correct answer is more than 48 Hours = 70% Refund)
- ✓ > 24 Hours = 60% Refund
- ✓ > 4 Hours = 50% Refund
- ✓ < 4 Hours = 0% Refund

6. Login into Braintree in Arizona or Texas depending on which state the reservation is in. Your login will determine which state it takes you to.



7. Copy (Ctrl+C) the Braintree payment code from the reservation in RideBits (2thm8xvw).

If the payment code doesn't bring up anything, make sure you are in the right state, then use the customer number on the top right instead. If that doesn't work, try a transaction search using the payment amount exactly like 198.09 to 198.09.

	Subtotal	\$161.18	
	Tip	\$24.18	(15.0%)
	Tax	\$12.73	(7.9%)
	Invoice Total	\$198.09	

Payments		Add new payment
Credit Card	\$198.09	Edit Delete
Credit card payment REF: Braintree: 2thm8xvw		
	Total payments	\$198.09
	Outstanding balance	\$0.00

and paste it into the Braintree search box, then hit enter.

Note: Usually there's just one payment code, but sometimes there are two meaning there was more than one payment. If this is the case, we figure out the correct refund amount from the Invoice Total not the payment, refund the smaller payment, and then part of the larger payment to refund the correct amount.



8. Click on the blue ID link to open the payment.

Search Results

Results

Found 1 Transaction

[Download](#)

Amount	Type	Status	ID
\$198.09 USD	Sale	✓ Settled	2thm8xvw

9. See if a refund was already processed. (Wasn't done in this example). If not, then open the calculator on your computer and multiply the amount times .70, .60 or .50 to get the correct refund amount. For example, $198.09 \times .70 = 138.66$ Refund (.70 is the same thing as 70%)

B Home **Transactions** Vault Reports Subscriptions

Transactions Payment Contexts

Transaction Detail For ID: 2thm8xvw

[Receipt](#) [Refund](#)

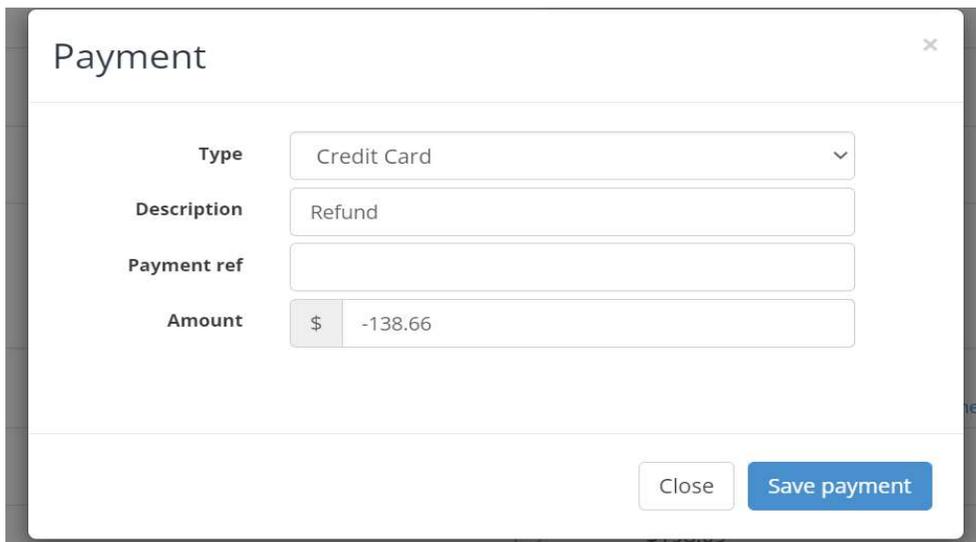
Transaction Information

Merchant	Airport Shuttle of Phoenix
Merchant Account	airportshuttleofphoenix
Transaction Type	sale
Amount	\$198.09 USD
Transaction Date <small>⌵</small>	Nov 25 2021, 12:20 PM MST
Order ID	7E4NWA
Status	Settled
Settlement Batch	2021-11-26_airportshuttleofphoenix_j2d54m6v
Processor Authorization Code	00125D

10. Click the RED “Refund” button and type 138.66 over the 198.09 amount, then click the black “Refund” button to process the refund.

Note: 100% refunds are rare, so only use the exceptions provided on step 3. Don't assume that customers are always telling the truth. Most of the time you can prove it one way or the other by doing a little research.

11. Record the Refund in RideBits – go back to the reservation all the way to the bottom and click “add new payment”. Type the amount you refunded as a negative number in the box and save. If you did it right, the reservation will now say partially paid.

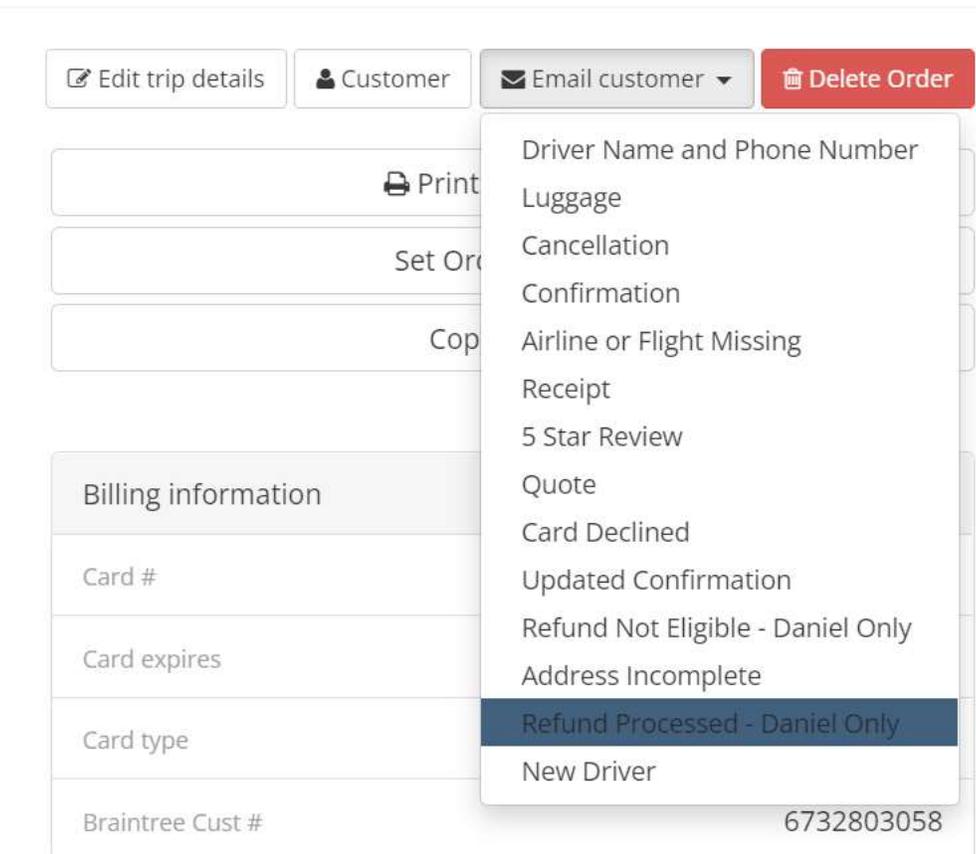


The screenshot shows a 'Payment' modal window. It contains the following fields and values:

- Type: Credit Card
- Description: Refund
- Payment ref: (empty)
- Amount: \$ -138.66

At the bottom right, there are two buttons: 'Close' and 'Save payment'.

12. Now select the refund processed email and send.



The screenshot shows the 'Email customer' dropdown menu open. The options listed are:

- Driver Name and Phone Number
- Luggage
- Cancellation
- Confirmation
- Airline or Flight Missing
- Receipt
- 5 Star Review
- Quote
- Card Declined
- Updated Confirmation
- Refund Not Eligible - Daniel Only
- Address Incomplete
- Refund Processed - Daniel Only** (highlighted)
- New Driver

The background shows the 'Billing information' section with fields for Card #, Card expires, Card type, and Braintree Cust # (6732803058).

