

REFUNDS

In the case that a guest requires a refund, the system can support refunding a transaction in different tender types. Users can refund customers via cash, house account, or credit card. There are two types of refunds: standalone refunds and refunding a specific ticket. Refund tickets are just like standard tickets but all amounts are negative. A refund ticket is created from the ticket's Info screen at the bottom under 'Ticket Actions'. Refund tickets have their own distinct red ticket color and can be identified by their '-REF' ticket number suffix.

*Please note that the refund feature is only supported in MB POS version 3.0 and above.

Standalone Refunds

Refunds can be created via the 'New Ticket' button, which don't tie to any original ticket sales. The ticket can be set as a refund before or after the items are rung up.

Open Amount Refunds

Refund tickets contain an 'Open Amount' option, similar to a configured adjustment, that allows refunding a specific amount to cover odd cases where the correct amount can't be achieved by ringing in item sales.

Refunding Tips

If refunding an old ticket that had a tip, upon creation the system will prompt if the tip should also be refunded. If so, a Tip Refund adjustment will be added to the ticket for the same amount.

This is for convenience to maintain the original ticket's total and does not affect the tips or payout of the original staff member who earned them.

Refunding From Previous Day's Ticket

The system also supports refunds which tie to a specific ticket from an earlier day. This is done by accessing a ticket from 'Reports' -> 'Tickets' in the POS, selecting the ticket to refund, then hitting 'View Original' in the top right near Print. This pulls up the old ticket in View-only mode, and selecting 'Refund Ticket' will create a refund version of the ticket without affecting the original. For the sake of partially refunding tickets, items can be deleted as needed from the refund ticket.

Refunding With Different Tender Types

The app lets the user refund transactions to different tender methods based on the preference of the guest and/or the merchant.

Cash Refunds

Cash refunds require the staff member to have cash drawer permission and be attached to a cash drawer or have a server bank. Expected Cash is affected in the same way as is a Cash Void.

Credit Card Refunds

The app lets the user refund credit card transactions, but the operational requirements vary depending on whether the merchant is processing with PAX for EMV or BridgePay for swipes.

Credit Card refunds (BridgePay)

There is no manual entry process for CC refunds through BridgePay. To perform a card-not-present refund when refunding a specific ticket that was originally tendered to a credit card, the user can select the 'Card' button on the Checkout screen and choose that exact card to refund to. The refund amount cannot exceed the amount that was authorized for the original payment.

Credit Card refunds (PAX)

PAX refunds are performed through the pinpad in the same manner as a sale would be performed, via swipe or manual entry.

Refunds through PAX cannot be done via Chip, they must be swiped.

House Account Refunds

Refunds can also be issued via house accounts.

Note that house account refunds only apply the refund via the account selected. This will decrease the net amount charged to a house account for a given period of time.

Refunds location option

Refunds must be enabled under Location Setup -> Settings -> Transaction Settings in order to create refund tickets.

Refunds permission

Staff must have the Refunds permission in order to create refund tickets; by default staff members with Admin role permission will be able to perform refund.

Refund Reporting

items, adjustments, discounts, taxes, surcharges, and tenders on refund tickets are all reflected as the negative of their original values which is reflected in all reports (sales, cash, ticket detail, etc.). All refund tickets are listed under the Void Reasons report.