

# SIMS Agora for Schools

## Refund to Card procedure

**IMPORTANT NOTE:** the Agora Refund to Card procedure applies to Agora products, trips, etc., but **NOT SIMS Dinner Money**. Where SIMS Dinner Money payments are received via Agora, any refunds due should continue to be dealt with in the usual way via the Dinner Money module.

It is now possible to refund SIMS Agora card payments direct to the card used in the original transaction. This eliminates the need for the school and the student to handle money that is being refunded.

**PLEASE NOTE:** Refunds made direct to a card can only be refunded to the card used in the original transaction. It is not possible to nominate another card to receive the returned funds.

1. From the SIMS Agora **Administration** page, select the **Manual Transactions** tab.
2. Search for the relevant student and click the adjacent **Action** button.
3. Select **Refund to Card** from the drop-down list.
4. Select items to be refunded by clicking the **Refund** (hand) icon in the **Actions** column.
5. A pop-up window is displayed, providing the opportunity to enter the quantity of the item and amount of money being refunded.
6. **IMPORTANT NOTE:** If a surcharge was applied to the original payment, you will be asked if you wish to refund the surcharge. If you select **Yes**, the entire surcharge amount will be refunded, even if the refund is only for part of the original transaction. If the surcharge is not refunded at this point, it cannot be refunded at a later date independently of the product to which it was applied. The transaction charge, which was paid by the school for the original payment, can never be refunded.
7. Click the **Save** button and repeat for any other items that were purchased in the same payment.
8. **NOTE:** Once an item is selected for refund, items that were not part of the same payment will be faded out. The notice (**different payment**) will also appear under the dates of all payments in the list that it is not possible to include in this refund.
9. When all of the required items have been selected, check the refund **Total** and click the **Continue** button.
10. Enter the **Reason** why you are refunding this item, e.g. Left the session early.
11. Click the **Refund to Card** button.
12. A pop-up dialog asks you to confirm the refund.
13. Click the **Yes** button.
14. The refund is recorded automatically in SIMS Agora and the payment will be returned to the **Payer** as part of the school's BACS payment process.
15. Click the **Print** button to print a receipt of the refund.