

How to handle refunds or adjustments

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Occasionally a donation needs to be refunded or adjusted.

Steps

1. Open the original donation record.
2. Look for an **Adjust, Refund**, or **Void** option (wording varies).
3. Enter the refund or adjustment amount, the date, and a clear reason.
4. Save the change.

Campaign totals and the donor's giving history should update accordingly.

Important: Always document the reason for the refund or adjustment. This supports financial audits and helps anyone reviewing the record later understand what happened.
