

Customizing refund settings (collecting payments from Customers)

Last Modified on Jun 5, 2020

Note:

This article only applies if you use our [PayPal integration to collect payments from your Customers](#). If you have any questions on how we bill you as a OnceHub Customer, go to the [Account billing article](#).

The [ScheduleOnce connector for PayPal](#) allows you to process refunds as an integral part of your booking process:

- Customers can automatically receive refunds when they cancel a booking.
- Users can issue refunds directly from the [Activity stream](#).

In this article, you will learn how to set the refund settings for your account.

Requirements

To customize the Refund settings, you must be a OnceHub Administrator.

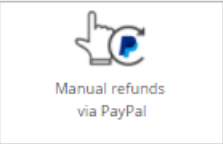
Selecting the Refund settings for your ScheduleOnce account

1. Go to **Setup -> ScheduleOnce setup**.
2. From the lefthand sidebar, go to **Integrations -> Payment**.
3. Click the **Customize payment settings** button to reach Payment settings.
4. Select the **Refund settings** option for your account (Figure 1).

Refund settings ?

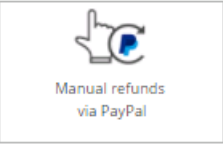
Select the refund settings for your account:

Do not enable processing of refunds via ScheduleOnce
Refunds can only be processed via PayPal.



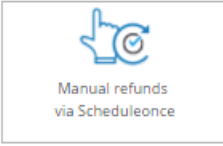
Manual refunds
via PayPal

Enable manual processing of refunds via ScheduleOnce *
Manual refunds are context sensitive and there is no need to search for the transaction in PayPal. When the refund is made, it is recorded in ScheduleOnce and a credit invoice is automatically generated and sent to the Customer.



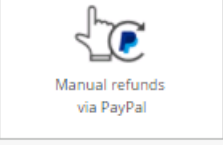
Manual refunds
via PayPal

+



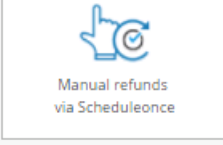
Manual refunds
via Scheduleonce

Enable manual and automatic processing of refunds via ScheduleOnce *
The Customer is automatically refunded based on your Cancellation policy. When the refund is made, it is recorded in ScheduleOnce and a credit invoice is automatically generated and sent to the Customer.



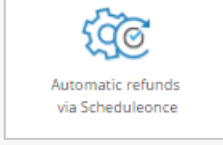
Manual refunds
via PayPal

+



Manual refunds
via Scheduleonce

+



Automatic refunds
via Scheduleonce

Continue

*Processing manual refunds from ScheduleOnce also requires permission on the User level. Go to Account -> Users tab to update settings.

Figure 1: Refund settings

In the **Refund settings** you will have the following options available for your account:

- **Do not enable processing of refunds via ScheduleOnce:** This option is selected by default. If you decide to use this option, Users will be able to issue refunds only via the connected PayPal account.
- **Enable manual processing of refunds via ScheduleOnce:** When choosing this option, Users can issue refunds directly from the [Activity stream](#). [Learn more about manual refunds via ScheduleOnce](#)

Note:

In order to issue a refund via ScheduleOnce, you must ensure that the User making the refund has the permission to process manual refunds via ScheduleOnce. [Learn more about controlling User refund permissions](#)

- **Enable manual and automatic processing of refunds via ScheduleOnce:** This setting enables all refund options in your ScheduleOnce account and allows you to streamline your refund processes throughout the booking lifecycle. Users can issue refunds directly from the Activity stream, and Customers can be automatically refunded when they cancel a booking on the [Customer Cancel/reschedule page](#). [Learn more about automatic refunds via ScheduleOnce](#)

Note:

In order to issue a refund via ScheduleOnce, you must ensure that the User making the refund has the permission to process manual refunds via ScheduleOnce. [Learn more about controlling User refund permissions](#)
