

Registration cancellation for a credit note

14 Steps [View most recent version](#) 

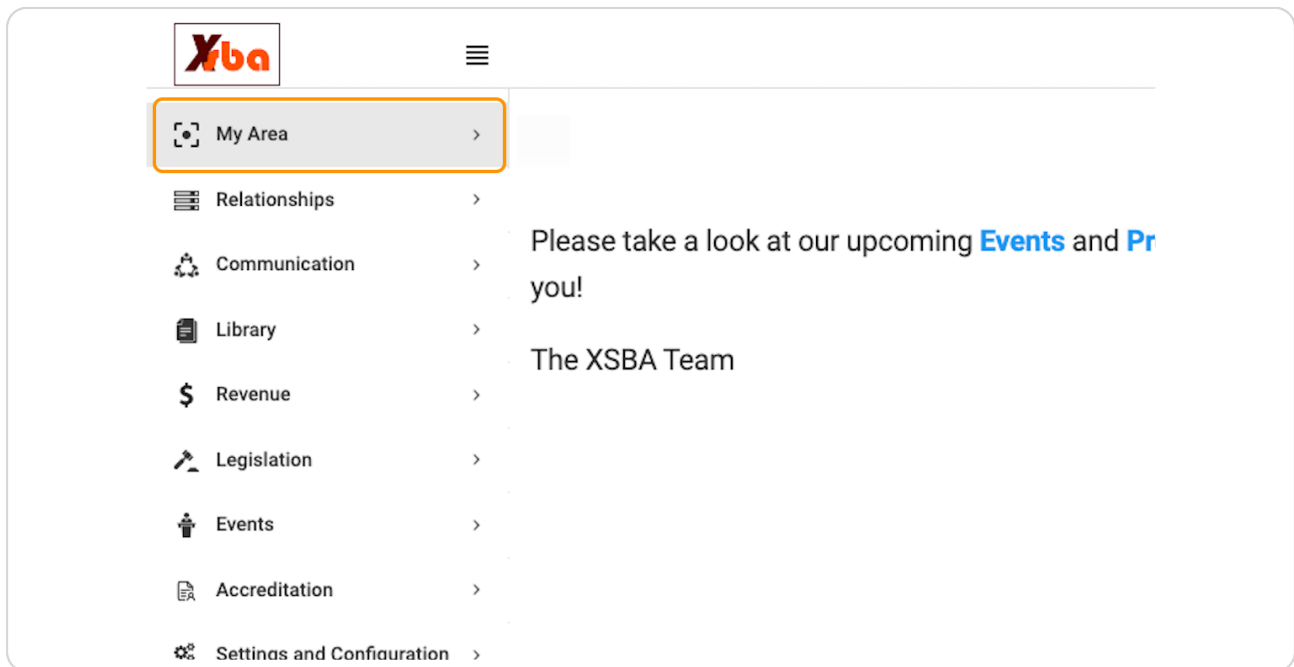
Created by
Engagifii Inc.

Creation Date
November 17, 2023

Last Updated
November 17, 2023

STEP 1

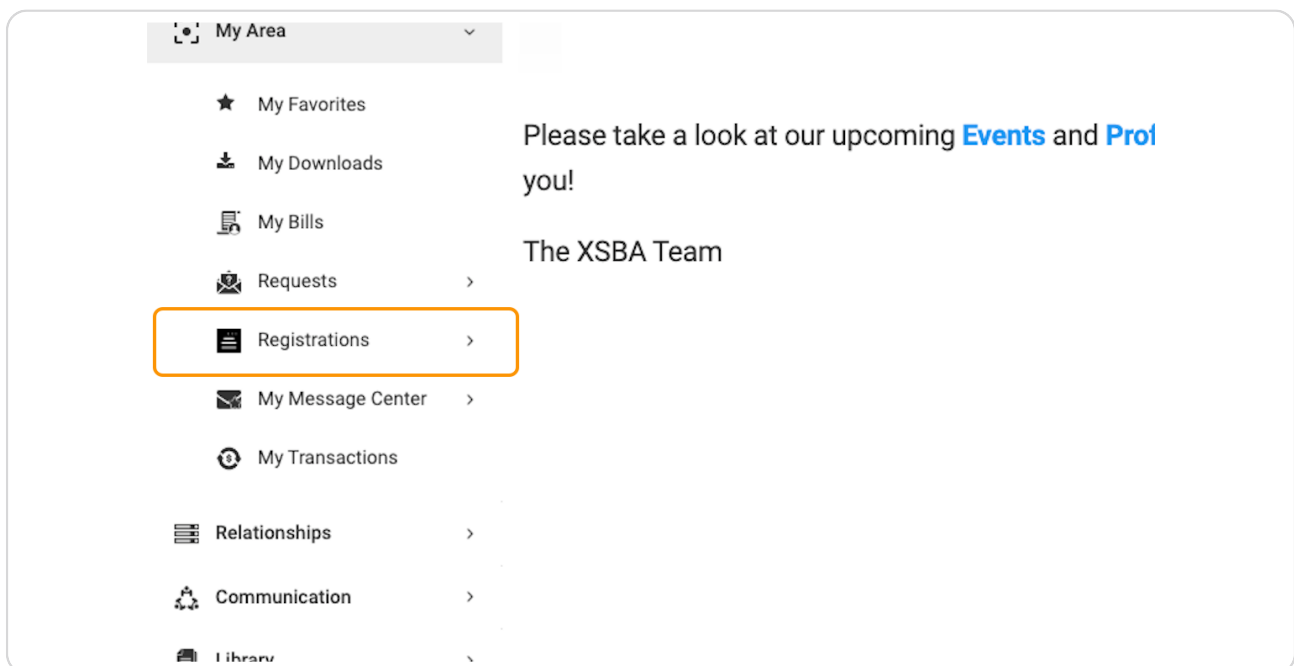
Click on My Area



The screenshot shows the Xsba user interface. At the top left is the Xsba logo. To its right is a hamburger menu icon. Below the logo is a list of menu items, each with an icon and a right-pointing chevron. The 'My Area' item is highlighted with an orange border. The other items are: Relationships, Communication, Library, Revenue, Legislation, Events, Accreditation, and Settings and Configuration. To the right of the menu is a white box containing the text: 'Please take a look at our upcoming [Events](#) and [Pr](#) you!' and 'The XSBA Team'.

STEP 2

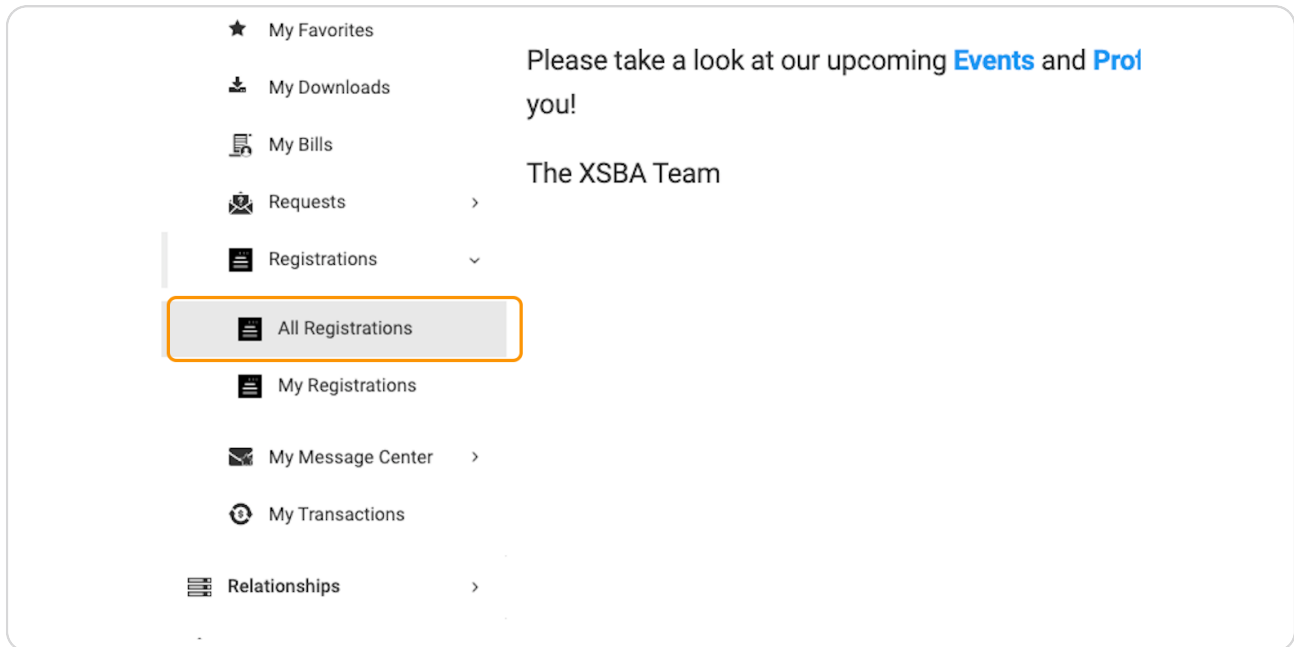
Click on Registrations



The screenshot shows the Xsba user interface. At the top left is the 'My Area' menu item, which is expanded to show a sub-menu. The sub-menu items are: My Favorites, My Downloads, My Bills, Requests, Registrations, My Message Center, and My Transactions. The 'Registrations' item is highlighted with an orange border. Below the sub-menu is a white box containing the text: 'Please take a look at our upcoming [Events](#) and [Prof](#) you!' and 'The XSBA Team'. Below the white box is the main menu, which includes: Relationships, Communication, and Library.

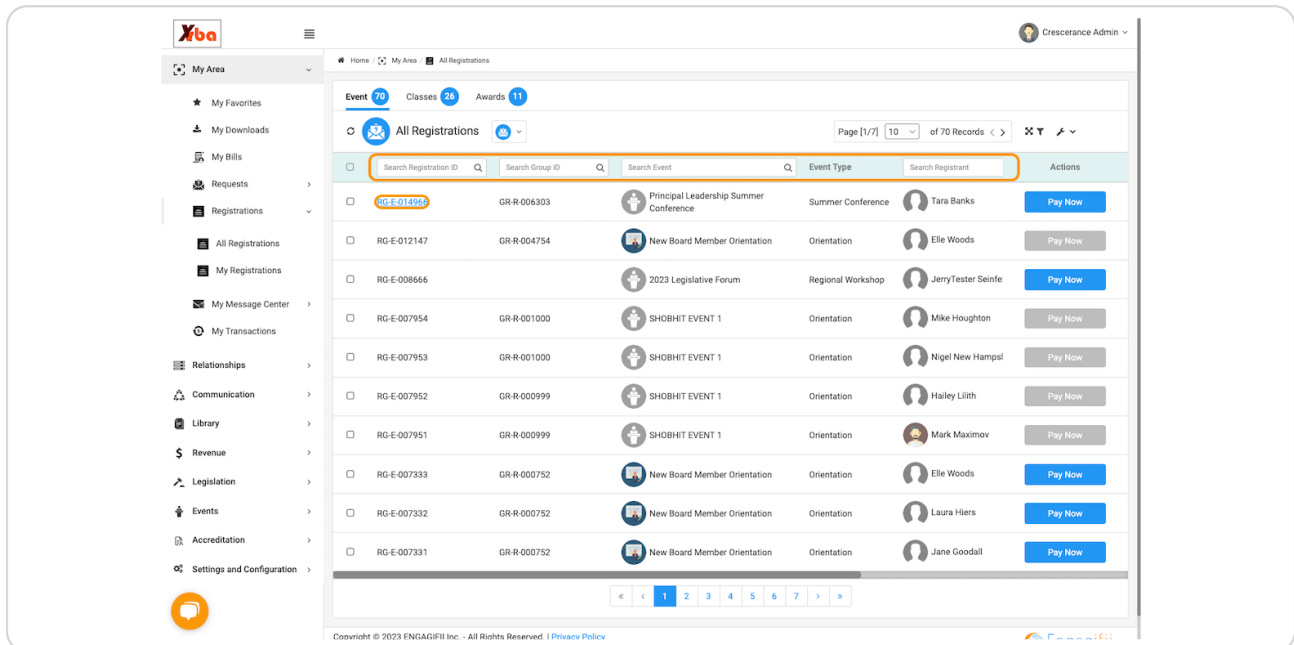
STEP 3

Click on All Registrations



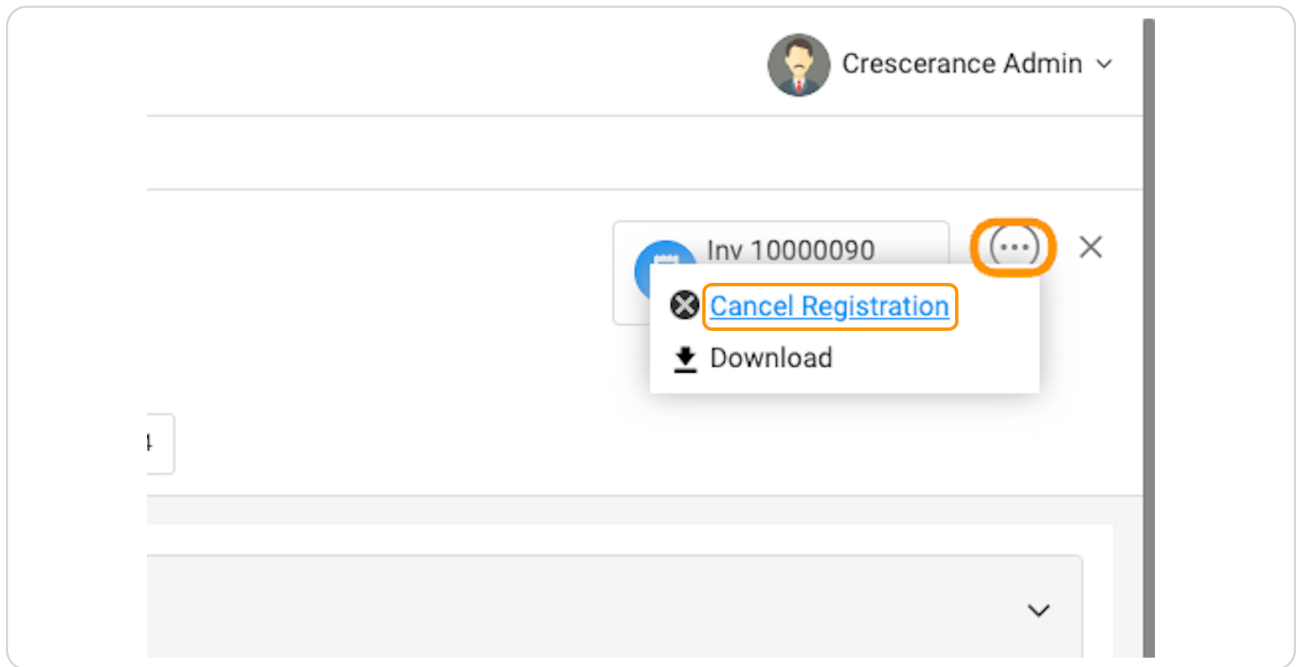
STEP 4

Can search by registration or group id, event or registrant name. Click on id for intended registration.



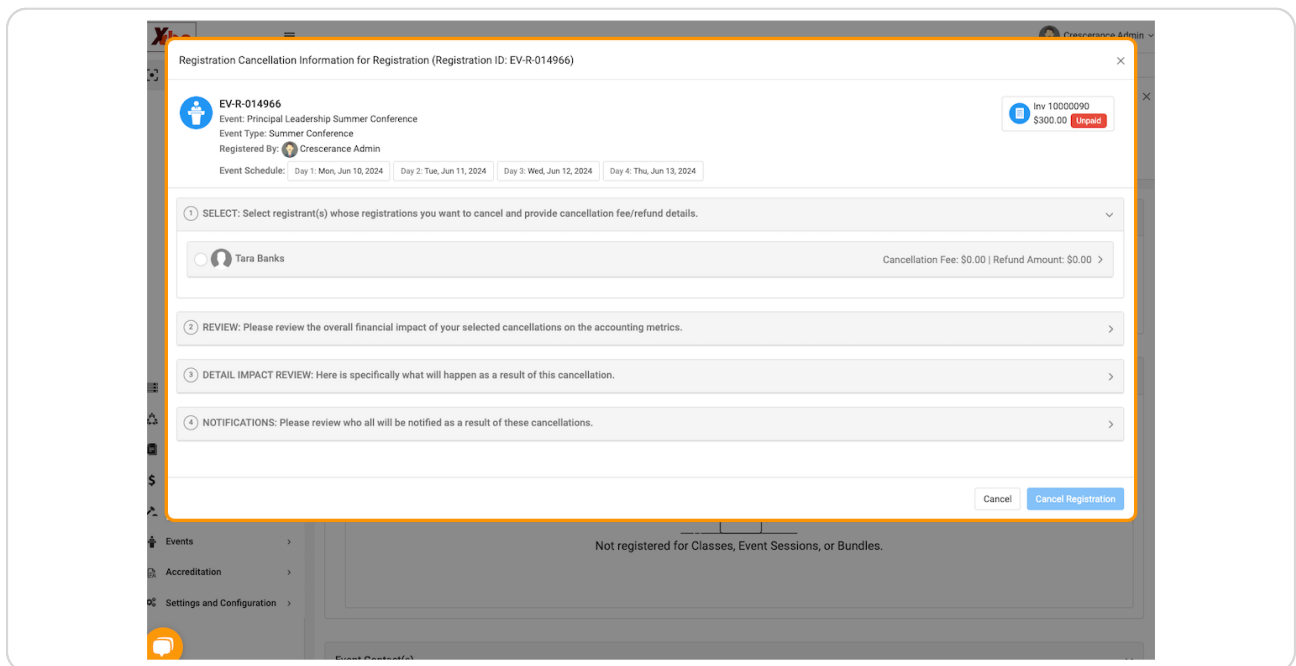
STEP 5

Click on three dots and then select Cancel Registration



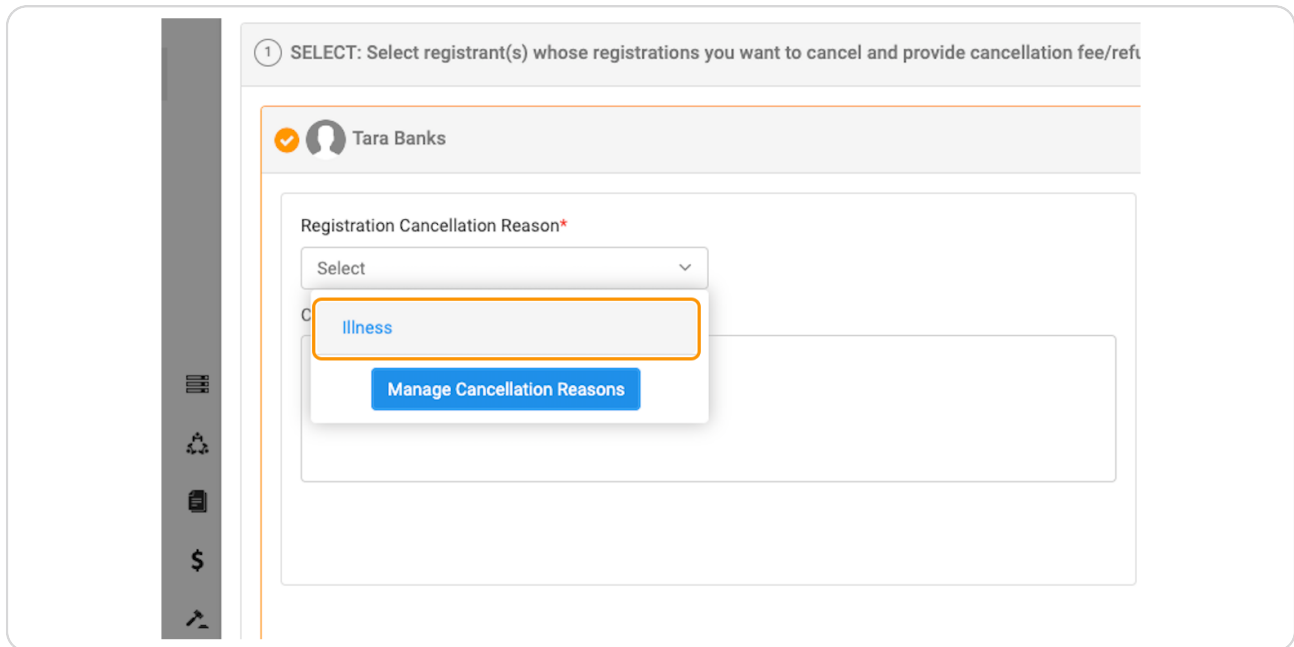
STEP 6

Select individual(s) to cancel



STEP 7

Click on Registration Cancellation Reason



1 SELECT: Select registrant(s) whose registrations you want to cancel and provide cancellation fee/refund

Tara Banks

Registration Cancellation Reason*

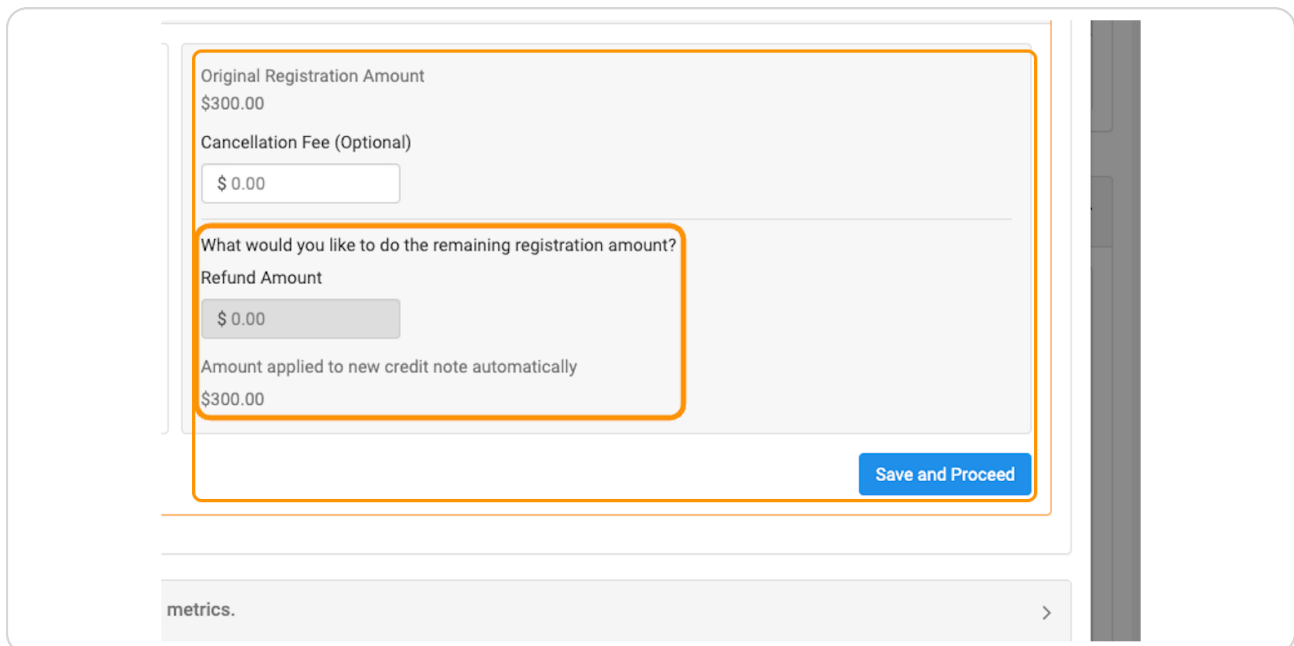
Select

Illness

Manage Cancellation Reasons

STEP 8

To create a credit note, leave refund amount at \$0.00 and click on Save and Proceed



Original Registration Amount
\$300.00

Cancellation Fee (Optional)
\$ 0.00

What would you like to do the remaining registration amount?

Refund Amount
\$ 0.00

Amount applied to new credit note automatically
\$300.00

Save and Proceed

metrics. >

STEP 9

Review Financial details and click on Proceed

Registration Cancellation Information for Registration (Registration ID: EV-R-014966)

Event: Principal Leadership Summer Conference
Event Type: Summer Conference
Registered By: Crescence Admin
Event Schedule: Day 1: Mon, Jun 10, 2024 Day 2: Tue, Jun 11, 2024 Day 3: Wed, Jun 12, 2024 Day 4: Thu, Jun 13, 2024

Inv 10000090
\$300.00 Unpaid

SELECT: Select registrant(s) whose registrations you want to cancel and provide cancellation fee/refund details.

REVIEW: Please review the overall financial impact of your selected cancellations on the accounting metrics. [Tara Banks \(tarabanks@yopmail.com\)](#)

Accounting Metrics Before Cancellations		Accounting Metrics After Cancellations	
Invoiced	YTD: \$600.00	Invoiced	YTD: \$600.00
	All Time: \$17,270.00		All Time: \$17,270.00
Payments Received	YTD: \$0.00	Payments Received	YTD: \$0.00
	All Time: \$4,040.00		All Time: \$4,040.00
Outstanding		Outstanding	
Invoices:	\$17,270.00	Invoices:	\$17,270.00
Payments:	\$4,040.00	Payments:	\$4,040.00
Credits:	\$0.00	Credits:	\$0.00
Refunds:	\$0.00	Refunds:	\$0.00
Balance Due:	\$13,230.00	Balance Due:	\$13,230.00

Previous Step Proceed

DETAIL IMPACT REVIEW: Here is specifically what will happen as a result of this cancellation.

NOTIFICATIONS: Please review who all will be notified as a result of these cancellations.

STEP 10

Review cancellation impact and click on Proceed

Registration Cancellation Information for Registration (Registration ID: EV-R-014966)

Event: Principal Leadership Summer Conference
Event Type: Summer Conference
Registered By: Crescence Admin
Event Schedule: Day 1: Mon, Jun 10, 2024 Day 2: Tue, Jun 11, 2024 Day 3: Wed, Jun 12, 2024 Day 4: Thu, Jun 13, 2024

Inv 10000090
\$300.00 Unpaid

SELECT: Select registrant(s) whose registrations you want to cancel and provide cancellation fee/refund details.

REVIEW: Please review the overall financial impact of your selected cancellations on the accounting metrics. [Tara Banks \(tarabanks@yopmail.com\)](#)

DETAIL IMPACT REVIEW: Here is specifically what will happen as a result of this cancellation.

Tara Banks

What will happen when this registration is cancelled?

- Event Registration will be cancelled.
- Event Participants list will be updated.
- A credit note of \$300.00 will be generated.
- The Credit note generated would be used to offset the unpaid invoice.

Previous Step Proceed

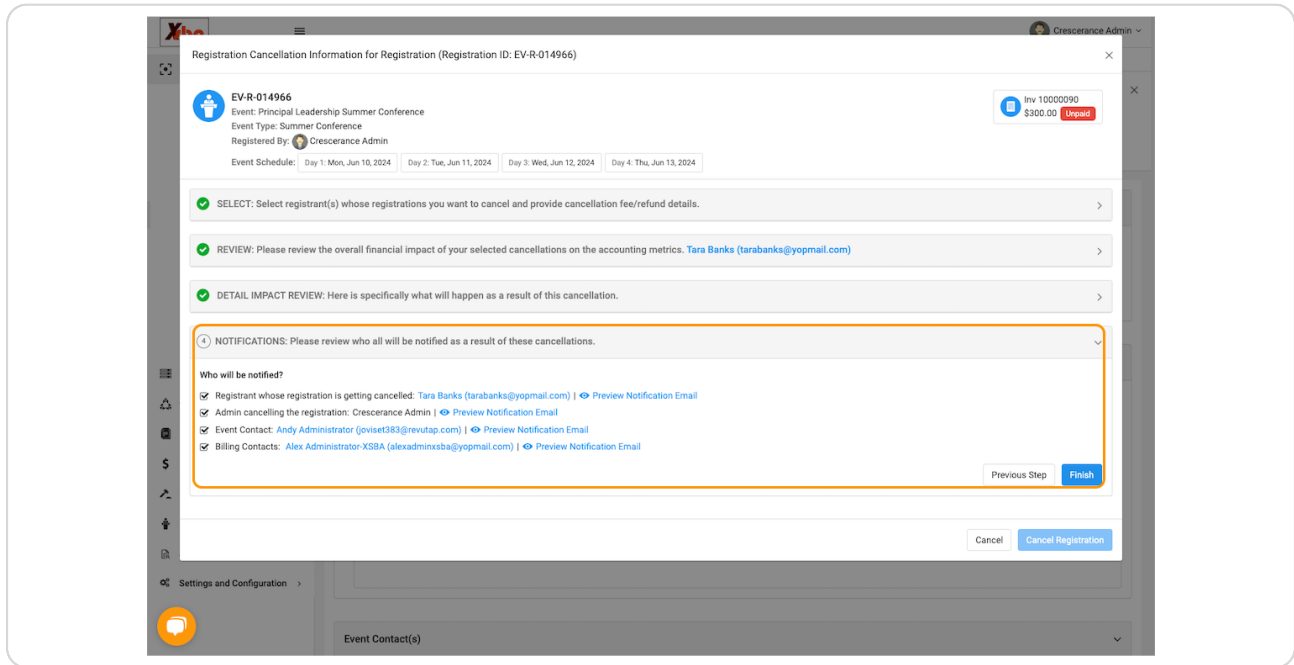
NOTIFICATIONS: Please review who all will be notified as a result of these cancellations.

Cancel Cancel Registration

Event Contact(s)

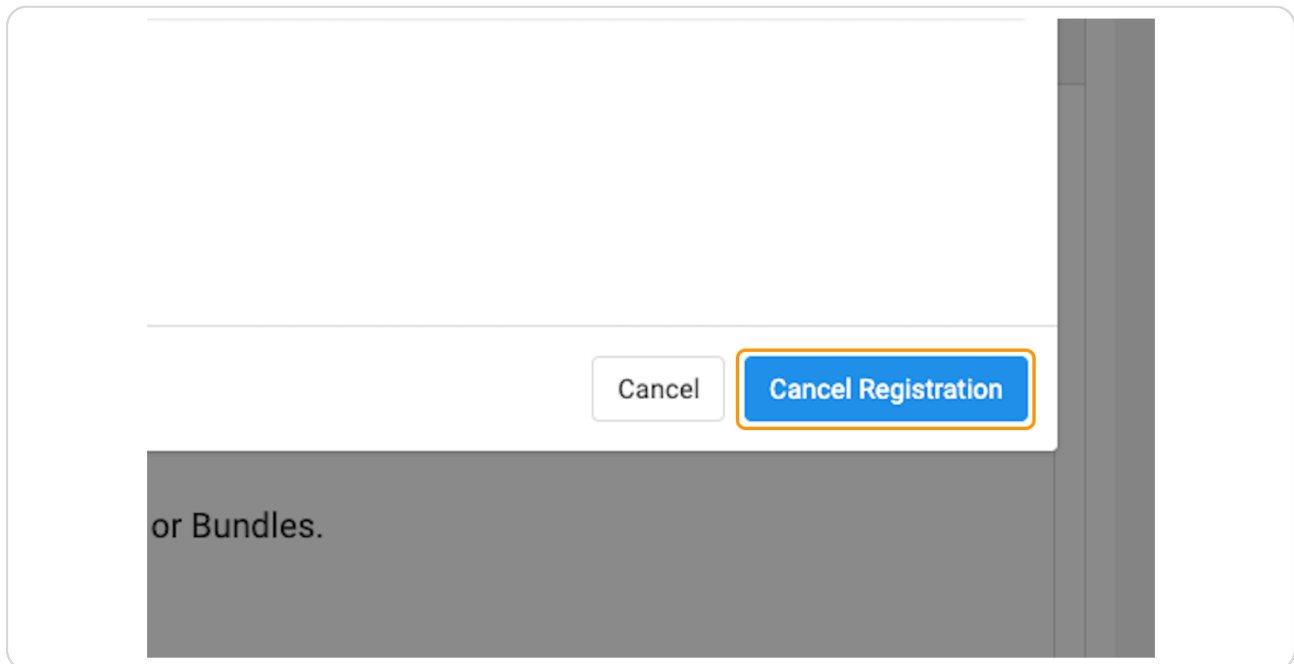
STEP 11

Review notifications and click on Finish



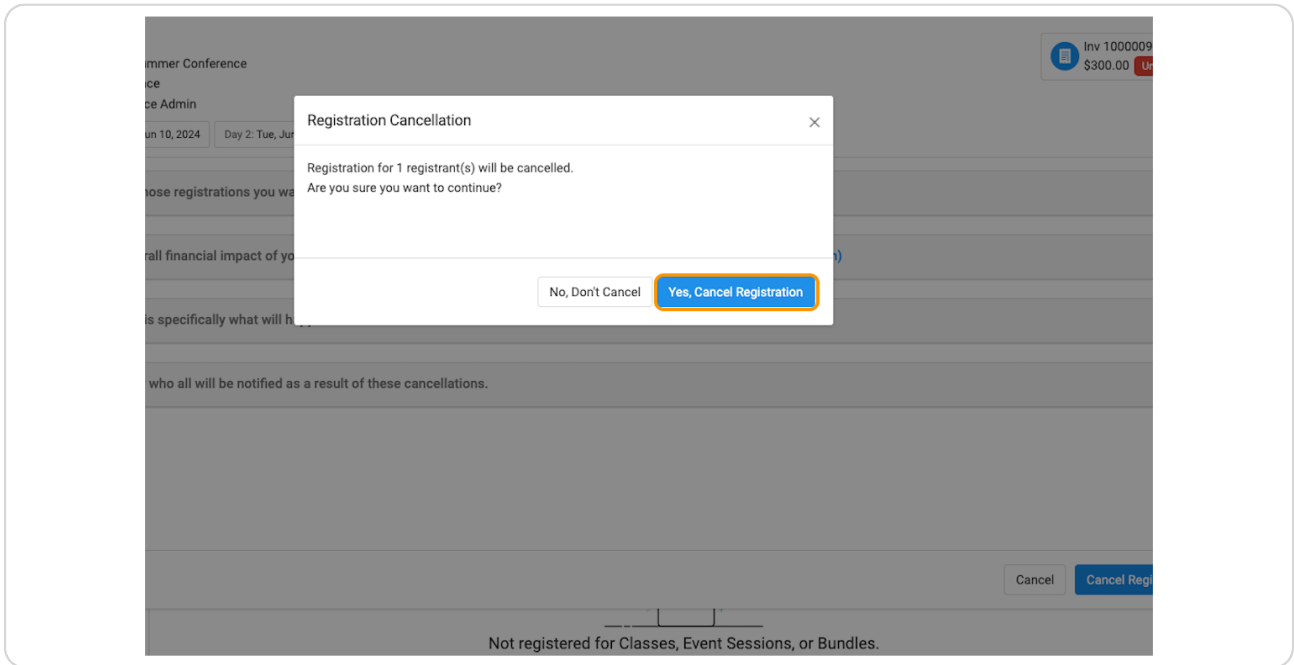
STEP 12

Click on Cancel Registration



STEP 13

Click on Yes, Cancel Registration



STEP 14

Now you have created a credit note to be applied to another unpaid invoice

