

## **REFUND REQUESTS**

A new enhancement has been introduced which will allow CSO users to submit a request for a refund on the CSO website without having to send an email to the Helpdesk.

Users will be allowed to submit refund requests for their own transactions. CSO Account Managers will be permitted to submit a request for refund for all users on their account providing no previous request has been submitted.

### **1. Request for a Refund on a transaction from my current CSO Session.**

Users can submit a refund request for a transaction made in their current CSO session by completing the following steps:

Click on the TRANSACTION SUMMARY link which is on left side menu



The TRANSACTION SUMMARY screen will appear which will show the recent transactions that have been made. Select the specific transaction that you want to request a refund for by ticking the box in the REFUND column.

| Service Description                                      | File No. | Amount | CSO Invoice Number | CSO Service ID | Approval Code                  | Payment Method                | Credit Card | Refund                   |
|--|----------|--------|--------------------|----------------|--------------------------------|-------------------------------|-------------|--------------------------|
| View File - VIC-S-S-061234 TEST, Do Not v RESPONSE, Give |          | \$6.00 | 1500016142         | 22189          | TEST                           | Purchase (Batch Subscription) | Visa        | <input type="checkbox"/> |
| Total For Session:                                       |          | \$6.00 | Canadian Dollars   |                | <a href="#">Request Refund</a> |                               |             |                          |

Once the transaction has been selected, click on the REQUEST REFUND button.

The REFUND SERVICES screen will appear and if you are a registered user logged into CSO, it will be pre-populate your user account information as seen below:

**Refund Services**

**Request Refund**

This will allow you to request a refund for a CSO Transaction.

**Surname:** \*  **First Name:** \*

**Company Name:**  **Country:**

**E-mail:** \*  **Phone:** \*

**Request Date:** 23Mar2011

[Add Another transaction](#)

| Date Of Service | Trans. ID | Invoice #  | Trans. Amount | Refund Requested | Reason Action                                  |
|-----------------|-----------|------------|---------------|------------------|--|
| * 23Mar2011     | 22189     | 1500016142 | \$6.00        |                  | <a href="#">Edit</a><br><a href="#">Delete</a> |

\* Please click on "Edit" beside each transaction to verify the amount of your refund request and to enter a reason for the request.

***NOTE:*** The asterisk denotes the fields that must be completed before continuing.

To continue with the request, click on the EDIT link which appears in the ACTION column and the REQUEST REFUND screen will appear. On this screen you are required to complete the following information:

- Reason for the Request
- Are you submitting a partial refund request
- Any additional comments

## Refund Services

### Request Refund

This will allow you to request a refund for a CSO Transaction.

**Surname:** \* TEST **First Name:** \* ONE  
**Company Name:** AG TEST LAW FIRM **Country:** Canada  
**E-mail:** \* TEST@telus.net **Phone:** \* 250-000-0000  
**Request Date:** 23Mar2011

**Transaction ID:** 22197  
**Transaction Date:** 23Mar2011 **Transaction Amount:** \$6.00

**Reason For Request:** \* -- Select Reason --

If you are not requesting a full refund for the entire transaction fee, please indicate the amount of your partial refund request below.

**Are you requesting a partial refund?**  No  Yes

**Additional Comments:**

 [Save](#) [Cancel](#)

Once the information has been completed, click on the SAVE link and review the summary of your refund request.

## Refund Services

### Request Refund

This will allow you to request a refund for a CSO Transaction.

**Surname:** \*  **First Name:** \*   
**Company Name:**  **Country:**   
**E-mail:** \*  **Phone:** \*   
**Request Date:** 23Mar2011

[Add Another transaction](#)

| Date Of Service | Trans. ID | Invoice #  | Trans. Amount | Refund Requested | Reason                           | Action   |
|-----------------|-----------|------------|---------------|------------------|----------------------------------|--|
| 23Mar2011       | 22197     | 1500016145 | \$6.00        | \$6.00           | Requested document not available | <a href="#">Edit</a><br><a href="#">Delete</a> |



Click on the SUBMIT REFUND REQUEST button.

The final screen will display the refund details and also provide you with a request number.

## Refund Services

### Request Refund

#### Refund Request Submitted

Your refund request has been successfully submitted. Your request number is **157**



You will be contacted at the contact information you provided if there are any further questions, or when your refund has been completed.

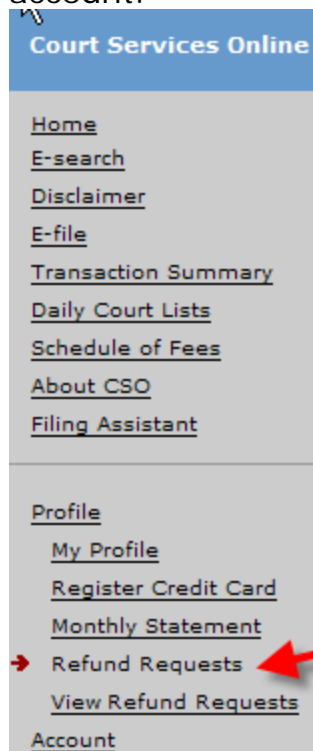
#### Refund Details

| Date Of Service | Trans. Id | Invoice #  | Trans. Amount | Refund Requested | Reason                           |
|-----------------|-----------|------------|---------------|------------------|----------------------------------|
| 23Mar2011       | 22197     | 1500016145 | \$6.00        | \$6.00           | Requested document not available |

**2. Request for a Refund on a transaction from a previous CSO Session.**

To request a refund for a transaction from a previous CSO session, the user can click on the MY PROFILE link. This will display the link the REFUND REQUESTS link.

If you are the CSO Account Manager, you will find the link under Manage Group Account (BCOL clients) or Account (BCeID clients). It is from here that you will be able to submit requests for refunds for other users on your account.



The REFUND SERVICES screen will appear and you will need to enter the TRANSACTION ID number into the box. Once the number has been entered click the VERIFY button:

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## Refund Services


### Request Refund

This will allow you to request a refund for a CSO Transaction.

**Surname:** \*  **First Name:** \*   
**Company Name:**  **Country:**    
**E-mail:** \*  **Phone:** \*   
**Request Date:** 23Mar2011

**Transaction ID:** \*  

**Transaction Date:** **Transaction Amount:**

**Reason For Request:** \*  

If you are not requesting a full refund for the entire transaction fee, please indicate the amount of your partial refund request below.

**Are you requesting a partial refund?**  No  Yes

**Additional Comments:**


 [Save](#) [Cancel](#)

When the transaction id has been verified the transaction date and transaction amount will populate on the screen.

## Request Refund

This will allow you to request a refund for a CSO Transaction.

**Surname:** \*  **First Name:** \*   
**Company Name:**  **Country:**   
**E-mail:** \*  **Phone:** \*   
**Request Date:** 23Mar2011

**Transaction ID:** \*    
**Transaction Date:** 23Mar2011 **Transaction Amount:** \$6.00   
**Reason For Request:** \*

If you are not requesting a full refund for the entire transaction fee, please indicate the amount of your partial refund request below.

**Are you requesting a partial refund?**  No  Yes

**Additional Comments:**

 [Save](#) [Cancel](#)

On this screen you are required to complete the following information:

- Reason for the Request
- Are you submitting a partial refund request
- Any additional comments

Click the SAVE button.

The REFUND SERVICE screen will populate the information which can be reviewed prior to clicking on the SUMBIT REFUND REQUEST.

## Refund Services

### Request Refund

This will allow you to request a refund for a CSO Transaction.

**Surname:** \*  **First Name:** \*   
**Company Name:**  **Country:**   
**E-mail:** \*  **Phone:** \*   
**Request Date:** 23Mar2011

[Add Another transaction](#)

| Date Of Service | Trans. ID | Invoice #  | Trans. Amount | Refund Requested | Reason                           | Action   |
|-----------------|-----------|------------|---------------|------------------|----------------------------------|--|
| 23Mar2011       | 22194     | 1500016143 | \$6.00        | \$6.00           | Requested document not available | <a href="#">Edit</a><br><a href="#">Delete</a> |



The final screen will appear which provides you with your request number and the refund details.

## Refund Services

### Request Refund

#### Refund Request Submitted

Your refund request has been successfully submitted. Your request number is **157**



You will be contacted at the contact information you provided if there are any further questions, or when your refund has been completed.

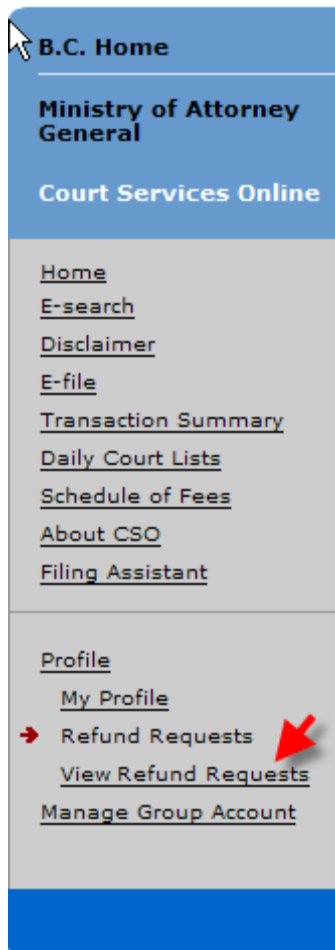
#### Refund Details

| Date Of Service | Trans. Id | Invoice #  | Trans. Amount | Refund Requested | Reason                           |
|-----------------|-----------|------------|---------------|------------------|----------------------------------|
| 23Mar2011       | 22197     | 1500016145 | \$6.00        | \$6.00           | Requested document not available |



### **3. How do I know when my refund has been processed?**




The AG CSO Support desks will process the submitted refund request as soon as possible. If you wish to check the status of your request, you may do so by clicking on the VIEW REFUND REQUEST link which is found under MY PROFILE. For CSO Account Managers, this link can be found under Manage Group Account (BCOL clients) or Account (BCeID clients).




The VIEW REFUND REQUESTS screen will display and you will be able to see a list of refund requests that have been made. The details provided include a STATUS column and there is also a quick search filter that you can utilize to identify refunds which are IN PROGRESS, COMPLETED, or REJECTED






## View Refund Requests

The table below shows all of the refund requests associated with your account. You can filter your requests using the *Status Quick Filter*.

Status Quick Filter:    [Go](#) 

### Refund Requests

1 - 5 of 5 results 

| Request # | Name              | Trans. ID | Date of Service | Date of Request | Status      |   |
|-----------|-------------------|-----------|-----------------|-----------------|-------------|---|
| 113       | CARRETERO, Marcos | 22033     | 10Mar2011       | 10Mar2011       | In Progress |  |
| 149       | CARRETERO, Marcos | 22147     | 14Mar2011       | 14Mar2011       | In Progress |  |
| 152       | CARRETERO, Marcos | 22160     | 14Mar2011       | 14Mar2011       | In Progress |  |
| 156       | CARRETERO, Marcos | 22195     | 23Mar2011       | 23Mar2011       | In Progress |  |
| 158       | TEST, One         | 22194     | 23Mar2011       | 23Mar2011       | In Progress |  |


To view the details of a particular request, simply click on the VIEW button and the VIEW REFUND REQUESTS screen will appear.

## View Refund Requests

**Refund Request #:** 158  
**Date Refund Requested:** 23Mar2011  
**Name of User:** TEST, One  
**Company Name:** SMITH COMPANY  
**E-mail:** Test@telus.net  
**Phone:** 250-000-0000


### Transactions

| Date of Service | Trans. ID | Invoice #  | Request Amount | Refund Amount | Reason                           | Status    |
|-----------------|-----------|------------|----------------|---------------|----------------------------------|-----------|
| 23Mar2011       | 22194     | 1500016143 | \$6.00         |               | Requested document not available | Requested |



\* Indicates refund previously granted

**Total refund requested:** \$6.00

**Total amount refunded:** 



Once a request for refund has been processed, you will receive an email notification advising you of its completion and you can then proceed to this screen to view any further details.