Klarstig

# Sales Financial Services Order Refund

Request review of a payment for a possible refund. Provide the transaction reference, reason and any returned goods or cancellation details.

## Contact and reference

**Organization using this document**

**Your name or contact reference ***

**Email for a reply if needed**

## Information for this document

**Order invoice or transaction reference ***

**Original payment date ***

**Original amount paid ***

**Refund amount requested ***

**Currency ***

- ☐ USD
- ☐ EUR
- ☐ GBP
- ☐ CAD
- ☐ Other

**Other currency code if selected**

**Reason for requesting a refund ***

### Return or cancellation status

- ☐ Completed
- ☐ In progress
- ☐ Not started
- ☐ Not applicable

### Supporting receipt or correspondence

Attach separately - uploads work in the online form only.

## Specific details

### Product name model or item reference

Complete when relevant to this request.

### Cancellation unused portion or other basis for the refund

## Operating context

### Service area and case reference

Complete when relevant to this request.

### Authorized reviewer supporting information and handling restrictions

## Team specific details

### Account opportunity or sales owner

Complete when relevant to this request.

### Customer needs buying stage commitments and next agreed contact

## Limitations and what needs setup

- Submitting the form records the answers in your workspace. It does not approve, schedule, charge or reply on its own unless you add that step to the workflow.
- No payment is taken by default. Online payment needs a connected payment account and is configured separately.
- File uploads work online only. The printable version lists the documents to attach but cannot collect them.
- Some questions become required only after certain answers. The printable version shows every question.
- Email notifications, approval routing, document generation and connections to other systems are available but not switched on until you configure them.

### Want help tailoring this form? Free, Starter and Pro include five personal setup sessions, up to 30 minutes each, per new organization.

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