

A short guide on how to categorise refunds within Mighty

[Bookkeeping](#)[Expenses](#)

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In this short article, we'll talk through how to account for refunds you have received on expenses within Mighty. If you're looking for guidance on refunding a client, you can click [here](#) for our guide on credit notes.

How to Categorise Refunds in Mighty?

Often throughout the year, you will have expenses refunded to you. Luckily, this is easy to categorise in Mighty, as you effectively categorise them in the exact same manner to the original expense. Let's explain with a quick example:

Using a realistic example thanks to the unreliability of UK trains, let's say that you had a partial refund for a train ticket. You can firstly find this transaction in the bookkeeping section and click categorise as normal, as shown in the yellow border below:

Date	Name	Description	Amount	VAT	Category ⓘ	Approve all
08/07/2024	Trainline	Refund	+15.60	Select VAT	Select category	Categorise

Then, you can simply select the category that the refund relates to, including any VAT if you're VAT registered, and click create expense and approve:

Categorise Transaction

36 to be categorised

X

Name	Description	Transaction Date:	Money in
Trainline	Refund	08/07/2024	15.6

Category

VAT Type

VAT %

Amount

Select category below

Clear

Standard ▼

20

15.6

[Create an auto categorisation rule](#)

[add/view attachment \(0\)](#) [split transaction](#)

Select which category this transaction belongs to:

Clicks the (?) for more info about each category

Q travel

AllMost usedIncomeDay to dayOverheadsPaying yourselfEquipmentTaxOther

 **Travel**

Fares and accommodation for business travel

?

And that's it, you've now categorised the refund in Mighty. Easy!

If you have any questions with this, please get in touch with support (support@mightyaccounting.com).

Read this guide online (always the latest version): <https://app.mightyaccounting.com/Knowledge/article/categorising-refunds>