TRADEPEG

Returns
Management

If a sales order is dispatched or partially dispatched, you can create a "quick resend" or you can create a "return/credit sales order."

- A "Quick resend" is when you want to send an item to a customer without waiting for the faulty item to come back.
- Creating a "Return/credit sales order" is when you want the customer to send back the item before giving them a refund or sending them a return.

How to create a Quick resend

1. First, we go to the SO (Sales Order) with the item we would like to resend to the customer.
2. Click the red setting icon at the top of the SO page.
3. Click Quick resend.

1. You will then be shown a screen where you can choose which item/s to resend.
2. You can either fill in the quantity manually for the item/s or you can click all and it will fill all the items on the SO

3. You also have a check box to confirm the SO which would save you time having to go into the order and confirm it.

Resend					Continue
SO	Part	Title	Packed	Qty	All
213	PDYH	Rhubarb cooked added sugar	4		

Confirm SO

When you press continue it will take you straight to the Return/credit sales order which you have just created, and you will see a red box at the top saying "resend"

You can confirm the return/credit SO from here if you did not automatically confirm it before.

Notes….(When the return SO is confirmed it re-runs the carrier rules other than taking the carrier from the original SO)

If you scroll down on this return/credit SO, you can see the related documents (the original SO).

When you are on the original SO you will see a purple box at the top saying "Resent"

(you cannot undo a "Quick resend" return/credit sales order but you can delete it.)

(you cannot add any other items to a "Quick resend" return/credit sales order)

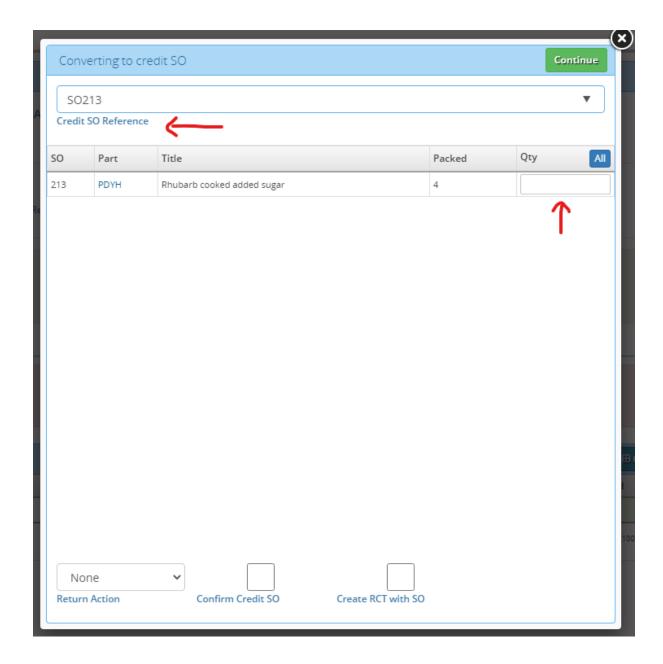## How to create a "Return sales order"

1. First, we go to the SO with the item/s that we would like to resend/refund to the customer.
2. Click the red setting icon at the top of the SO page.
3. Click create credit SO

1. You will then be shown a screen where you can choose which item/s to resend/refund.
2. We can then input the Credit SO reference e.g. the original SO number.
3. You can then either fill in the quantity manually for the item/s or you can click all and it will fill all the items on the SO

1. At the bottom you will then have to input an option for "return action". You can choose either Resend/Refund.
2. And you can choose whether you want to confirm the return/Credit SO and/or create an RCT with the return/credit SO or not.

After choosing Either refund/return and press continue you will then be taken onto the new Return/credit SO screen.

On the Return/credit SO screen you will be able to see the "Action status" which is pending and the "Return action" which in this case was refund.

If you did not confirm the SO or create RCT when creating the return/credit SO you will then be able to confirm the SO and create an RCT whenever you're ready.

If you are resending the item to the customer, and not just refunding them - after you have confirmed the SO and created a RCT you can then re-send the item/s as shown below.

1. Click the red settings icon and click "Resend"

2. You will then be able to choose how many items you want to send back to the customer.
3. At the bottom you set the "Action status" as complete and you can confirm the SO you are sending to the customer. (Action complete will be auto checked)

Resend

SO	Part	Title	Packed	Qty	All
263	AVPS	Abe's Pasta	4		

Continue

☑ Action Complete   ☐ Confirm SO

After you press continue it will take you to the "Resend SO"

SO000266 Resend

SO Does not match this minimum required GP for all items

| SO000266 | | | Unconfirmed > Confirmed | Edit SO |

| 18/02/2021 | [E-LDZQF] Ernser-Koepp | Standard | | | | | |
| SO Date | Customer | VAT Group | | Sales Rep | Picking | Preferred Carrier | |

| Main Warehouse | INV103 | COD | USD 1.296033 | 02/09/2020 | 09/09/2020 | |
| Warehouse | Customer Reference (PO) | Terms | Currency Rate | Dispatch | Dispatch Start | Delivery Due | Progress |

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United States
Billing address

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8976 Grim Center
62705,Springfield,IL
United States
Shipping address

Show Price Analysis

Edit SO Details

	Part	EAN	Brand	Description	Reference	Stock	UOM	Requested	Confirmed	Packed	Invoiced	Price	Discount	GP	Subtotal
☐	PAFE	4011200296908	Brand B	Water chestnuts canned sliced		48.25	Case	4		0	0	0.00			0.00
	1 Lines							4	4	0 (0%)	0 0.00			0.00	

		Total Gross:	USD 0.00
		Discount:	USD 0.00
		Subtotal:	USD 0.00
		VAT:	USD 0.00
			USD 0.00

If you go back to the Credit/return SO you will see the action status as complete.

If you scroll down to the bottom of the page you will be able to see the "Related documents" for this Return/credit SO (the original SO).

After it has all been confirmed you can manage returns by going to Sales orders > Manage returns.

After clicking "manage returns" you will able to see your "Open returns".

In open returns you can see the,

- Return/credit SO number
- The Status
- Date
- Origin
- Received status
- Reference
- Return action
- Action status (in actions status it will be pending and when you receive the item/s you can click the purple tick to confirm the return/refund and it will move off your open returns page.