



Returns Management

Contact us on **0333 344 5026**

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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.

SO000164

The screenshot shows the Sales Order (SO) page for SO000164. The page is divided into several sections. At the top, there is a header with the SO number and a red setting icon. Below this, there is a section for order details, including the date (14/09/2020), customer ([C00055] Customer), and warehouse (Main Warehouse). A dropdown menu is open, showing options: Merge dispatch, Send Order Notification, Duplicate SO, Repeat this SO, Create Credit SO, and Quick Resend. A red arrow points to the 'Quick Resend' option. Below the dropdown, there is a section for customer information, including the customer name, address, and contact details. At the bottom, there is a table of items with columns: Part, EAN, Brand, Description, Reference, Stock, UOM, Requested, Confirmed, Packed, Invoiced, Price, Discount, GP, and Subtotal. The table shows one item: PABP, EAN 5000010000033, Brand B, Peas, green, canned drained, with a stock of 266 and a requested quantity of 1. The total gross is GBP 17.23, discount is GBP 0.00, subtotal is GBP 17.23, and VAT is GBP 3.45, resulting in a total of GBP 20.68.

Part	EAN	Brand	Description	Reference	Stock	UOM	Requested	Confirmed	Packed	Invoiced	Price	Discount	GP	Subtotal
PABP	5000010000033	Brand B	Peas, green, canned drained		266	1 Case	1	1	1	0	17.23		-4.42	17.23
1 Lines							1	1	1	0			-4.42	(-25.95 %)

Total Gross: GBP 17.23
Discount: GBP 0.00
Subtotal: GBP 17.23
VAT: GBP 3.45
GBP 20.68

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.

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

☐ 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)

SO000171

Resend

New Sales Order



SO000171 Unconfirmed Confirm SO Edit SO

23/09/2020 [C00055] Customer Standard
SO Date Customer VAT Group Sales Rep Picking Preferred Carrier

Main Warehouse Warehouse Customer Reference (PO) COD Terms GBP 1 14/09/2020 21/09/2020
Currency Rate Dispatch Dispatch Start Delivery Due Progress

Customer 36-38 Waterloo Rd NW2 7UH, London, England United Kingdom 03333445026 Billing address
Customer 36-38 Waterloo Rd NW2 7UH, London, England United Kingdom 03333445026 Shipping address

Part	EAN	Brand	Description	Reference	Stock	UOM	Requested	Confirmed	Price	Discount	Expected Price	GP	Subtotal
PABP	5000010000033	Brand B	Peas, green canned drained.		266	1 Case	1	1	0.00		17.23	0.00	0.00
1 Lines													

Confirm SO

Total Gross: GBP 0.00
Discount: GBP 0.00
Subtotal: GBP 0.00
VAT: GBP 0.00
GBP 0.00

Payments Add

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

Payments Add

Date	Amount	Account	Reference

Invoices Proforma Invoice Mark Processed

Related Documents ←

Relation	Document
Created Resend	SO000164 ←

Print

Show Log

Export

Attachments Refresh

Choose Files No file chosen Select File

Description

Notes Refresh

Add a comment. @ to mention a person.

Subscribers Select

↑

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



SO000164 Resent

New Sales Order

SO000164

Unconfirmed Confirmed Edit SO

14/09/2020

[C00055] Customer

Standard

Strict

Van 4

SO Date

Customer

VAT Group

Sales Rep

Picking

Preferred Carrier

Main Warehouse

Customer Reference (PO)

COD

GBP 1

Split

14/09/2020

21/09/2020

100.00%

Warehouse

Terms

Currency Rate

Dispatch

Dispatch Start

Delivery Due

Progress

Customer

36-38 Waterloo Rd

NW2 7UH,London,England

United Kingdom

03333445026

Billing address

Customer

36-38 Waterloo Rd

NW2 7UH,London,England

United Kingdom

03333445026

Shipping address

Show Price Analysis

Create Part Add Part Paste Batch Select Batch Edit SO Details

Part	EAN	Brand	Description	Reference	Stock	UOM	Requested	Confirmed	Packed	Invoiced	Price	Discount	GP	Subtotal
PABP	5000010000033	Brand B	Peas, green, canned drained		266	1 Case	1	1	1	0	17.23		-4.42	17.23
1 Lines							1	1	1 (100%)	0			-4.42	(25.65%)
													Total Gross:	GBP 17.23
													Discount:	GBP 0.00
													Subtotal:	GBP 17.23
													VAT:	GBP 3.45
														GBP 20.68

Payments

Add

Date	Amount	Account	Reference

(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



New Sales Order

- Merge dispatch
- Send Order Notification
- Duplicate SO
- Repeat this SO
- Create Credit SO
- Quick Resend

- 5/11



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”

Credit SO000265

New Credit SO

Credit SO000265

Unconfirmed > Confirmed Edit SO

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

Main Warehouse INV103 COD USD 1.296033 02/09/20
Warehouse Customer Reference (PO) Terms Currency Rate Dispatch Dispatch SL

Resend Pending
Return Action Action Status

Ernser-Koepp
8976 Grim Center
62705, Springfield, IL
United States
Billing address

Ernser-Koepp
8976 Grim Center
62705, Springfield, IL
United States
Shipping address

Send Order Notification
Duplicate SO
Resend

Show Price Analysis

Create Part Add Part Paste Batch Select Batch Edit SO Details

Part	EAN	Brand	Description	Reference	Stock	UOM	Requested	Confirmed	Packed	Invoiced	Price	Discount	GP	Subtotal
PAGE	5011300236950	Brand B	Water chestnuts canned sliced		48.25	Case	4	4	4	0	324.80			1,299.20
1 Lines							4	4	4	(100%) 0.00			0.00 Cr	
													Total Gross:	USD 1,299.20
													Discount:	USD 0.00
													Subtotal:	USD 1,299.20
													VAT:	USD 259.84
														USD 1,559.04

- You will then be able to choose how many items you want to send back to the customer.
- 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

Continue

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

Action Complete

Confirm SO

After you press continue it will take you to the “Resend SO”

SO000266

Resend

New Sales Order

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

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

Ernser-Koepp

Ernser-Koepp

8976 Grim Center

8976 Grim Center

62705, Springfield, IL

62705, Springfield, IL

United States

United States

Billing address

Shipping address

Show Price Analysis

Edit SO Details

Part	EAN	Brand	Description	Reference	Stock	UOM	Requested	Confirmed	Packed	Invoiced	Price	Discount	GP	Subtotal
PAFE	4011200366008	Brand B	Water chestnuts canned sliced		48.25	Case	4	4	0	0	0.00	0.00		0.00
1 Lines							4	4	0	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.

Credit

SO000173

New Credit SO

Credit SO000173

Unconfirmed

Confirmed

Edit SO

23/09/2020

[C-BGBPP] Champlin LLC

Standard

SO Date

Customer

VAT Group

Sales Rep

Picking

Preferred Carrier

Main Warehouse

Warehouse

SO148

Customer Reference (PO)

COD

Terms

GBP 1

Currency Rate

16/06/2020

Dispatch Start

16/06/2020

Delivery Due

100.00%

Progress

Refund

Complete

Return Action

Action Status

Lebsack-O'Keefe

8870 Buena Vista Pass

71105,Shreveport,LA

United States

Billing address

Lebsack-O'Keefe

8870 Buena Vista Pass

71105,Shreveport,LA

United States

Shipping address

Show Price Analysis

Create Part

Add Part

Paste Batch

Select Batch

Edit SO Details

Part	EAN	Brand	Description	Reference	Stock	UOM	Requested	Confirmed	Packed	Involved	Price	Discount	GP	Subtotal
ipn	50000100000582	Apple	Smartphone.		1416	160 Unit	1	1	1	0	1,200.00			1,200.00
1 Lines							1	1	1	0.00			0.00 Cr	

Total Gross:

GBP 1,200.00

Discount:

GBP 0.00

Subtotal:

GBP 1,200.00

VAT:

GBP 240.00

GBP 1,440.00

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).

Invoices

Proforma InvoiceGenerate Credit NoteMark Processed

Related Documents

Relation	Document
Created Credit SO	SO000148

Print

Show Log

Export

Attachments

Select File

Choose FilesNo file chosen

Refresh

Description

Notes

Add a comment. @ to mention a person.

Refresh

Subscribers

Select

✓

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



Advanced Search										
All	Any	Any	Any	Any	Any	Any	Any	Any	Any	Any
Warehouse	Type	Customers	Status	Packing	Involved					
SO	Type	Date	Customer	PO	Total	Currency	Status	Packing	Invoice	Shipment
<input type="checkbox"/> SO000174	Credit	23/09/2020	Champlin LLC	SO148	-280.52	GBP	Unconfirmed	Complete	Pending	Delivered
<input type="checkbox"/> SO000173	Credit	23/09/2020	Champlin LLC	SO148	-1,200.00	GBP	Confirmed	Complete	Pending	Delivered
<input type="checkbox"/> SO000172	Order	23/09/2020	A Gold Technology		0.00	GBP	Confirmed	Pending	Pending	Unshipped
<input type="checkbox"/> SO000171	Order	23/09/2020	Customer		0.00	GBP	Confirmed	Complete	Pending	Unshipped
<input type="checkbox"/> SO000168	Credit	22/09/2020	A Gold Technology		0.00	GBP	Confirmed	Complete	Pending	Delivered
<input type="checkbox"/> SO000167	Order	22/09/2020	Leback-O'Keefe	XXX	0.00	GBP	Confirmed	Complete	Pending	Unshipped
<input type="checkbox"/> SO000166	Order	22/09/2020	Beahan LLC		0.00	USD	Unconfirmed	Pending	Pending	Unshipped
<input type="checkbox"/> SO000164	Order	14/09/2020	Customer		17.23	GBP	Confirmed	Complete	Pending	Unshipped
<input type="checkbox"/> SO000163	Order	07/09/2020	Currys PC World Featuring Carphone Warehouse		0.67	GBP	Confirmed	Pending	Pending	Unshipped
<input type="checkbox"/> SO000162	Order	02/09/2020	Ernst-Koepf		92,596.61	USD	Confirmed	Complete	Complete	Unshipped
<input type="checkbox"/> SO000161	Order	02/09/2020	A Gold Technology		5,316.27	GBP	Confirmed	Partially	Pending	Unshipped
<input type="checkbox"/> SO000160	Order	04/08/2020	Leback and Sons		1,331.99	GBP	Confirmed	Pending	Pending	Unshipped
<input type="checkbox"/> SO000159	Order	04/08/2020	Beahan LLC		471.75	USD	Confirmed	Complete	Pending	Unshipped
<input type="checkbox"/> SO000158	Order	03/08/2020	Alan Chow		168.28	GBP	Confirmed	Pending	Pending	Unshipped
<input type="checkbox"/> SO000157	Order	23/07/2020	A C		132.00	GBP	Confirmed	Pending	Pending	Unshipped
<input type="checkbox"/> SO000156	Order	13/07/2020	Leback-O'Keefe	XXX	1,232.84	GBP	Confirmed	Complete	Complete	Pending Pickup
<input type="checkbox"/> SO000155	Order	18/06/2020	A C		5,528.64	GBP	Confirmed	Partially	Pending	Unshipped
<input type="checkbox"/> SO000154	Order	18/06/2020	A C		1,376.50	GBP	Confirmed	Pending	Pending	Unshipped
<input type="checkbox"/> SO000151	Order	17/06/2020	A C		2,325.60	GBP	Unconfirmed	Pending	Pending	Unshipped
<input type="checkbox"/> SO000150	Order	17/06/2020	A C		259.08	GBP	Confirmed	Complete	Complete	Unshipped
<input type="checkbox"/> SO000149	Order	17/06/2020	Lynch, Bode and Abernathy		0.00	USD	Unconfirmed	Pending	Pending	Unshipped

After clicking “manage returns” you will be 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).

