

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												• Unconf	firmed > Co	nfirmed	Edit SO
4/09/2020	[C00055] Cust	tomer		Standard						Merge disp	atch	Van	14		
O Date	Customer			VAT Group				Sales Rep		Send Order	Notification	Pref	erred Carrier		<b>.</b>
lain Warehouse /arehouse	Customer Refer	ence (PO)	COD Terms			GBP	1 ency Rate	Split Dispatch	14/09/20. Dispatch St	Duplicate S Repeat this		Prog		00.00%	
36-38 Waterloo Rd							38 Waterloo								
United Kingdom 03333445026 illing address						Uni 033	V2 7UH,Londo ited Kingdom 333445026 ving address			T					
NWZ 7UH, London, England United Kingdom 3333445026 Iilling address	Brand [	Description		Reference	Stock	Un <u>033</u> Shipp	ited Kingdom 333445026 ving address	-	B Create Part -		: EPaste E		_		SO Details
United Kingdom 03333445026 Iling address		Description Peas, green canned drained.		Reference	Stock 266 S	Un <u>033</u> Shipp	ited Kingdom 333445026			voiced Pr		latch 🗮 S Discount	GP -4.42	S	SO Details Subtotal
United Kingdom 03333445026 Illing address Il MI Show Price Analysis Part EAN				Reference		Un <u>033</u> Shipp UOM	ited Kingdom 333445026 bing address Requested	Confirmed	Packed In 1 0 1 (100%) 0	ivoiced Pr	rice I		GP	S	Subtotal

- 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.

Rese	nd			Co	ntinue
SO	Part	Title	Packed	Qty	All
213	PDYH	Rhubarb cooked added sugar	4		
Confi					
Confil	11 50				

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)



											•	Unconfirmed >	Confirm S	O Edit S
23/09/2020		[C00055] Cu	stomer		Standard									
SO Date		Customer			VAT Group			S	ales Rep		Picking	Preferred Ca	arrier	
Main Warehouse				COD			GBP	1		14/09/2020	21/09/2020			
Warehouse		Customer Refe	rence (PO)	Terms			Currency	Rate	Dispatch	Dispatch Start	Delivery Due	Progress		
36-38 Waterloo NW2 7UH,Lond United Kingdor 03333445026 iilling address	on,England						NW2 7		ngland					Edit SO Deta
		Brand	Description		Reference	Stock	UOM	Requested	Confirmed	Price	Discount	Expected Price	GP	Subtotal
	EAN													0.00
Part PABP	EAN 5000010000033	Brand B	Peas, green canned drained.			266	C 1 Case	1	/ 1	a 0.00 🗸		17.23 900	00005	0.00
Part						266	C 1 Case	1	1	● 0.00 ↓		17.23 500	0.00	
Part PABP						266	C 1 Case	1		● 0.00 ◆		Total G	0.00	Confirm SO
Part PABP			Peas, green canned drained.			266	C 1 Case	1		0.00 \$		Total G Disco	0.00 ross:	GBP 0.
Part			Peas, green canned drained.			266	C 1 Case	1 1		0.00 ¥		Total G Disco Subt	0.00 ross:	GBP 0. GBP 0. GBP 0. GBP 0. GBP 0.

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						
Related Docum	ents 🔶		Attachments			Refresh
Relation Created Resend	Document SO000164 🗲	_	Description		Choose Files No file chosen	٩
🔒 Print						
🗏 Show Log			Notes			Refresh
🗅 Export			Add a comment. @ to mention	a person.		4

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



SO000164														🔹 Unci	onfirmed 🔿	Confirmed	Edit SC
14/09/2020		[C00055] Ci	ustomer		Standard								Strict	v	'an 4		
SO Date		Customer			VAT Group				-	Sales Rep			Picking	P	referred Carrie	r	
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Warehouse		Customer Rel	ference (PO)	Terms				Currency	Rate	Dispatch	Disp	tch Start	Delivery Due	Р	rogress		
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Billing address	alysis EAN	Brand	Description		Reference	Stock	l	Shipping	address	Confirmed	E Create P	rt 🔹 🗉 /	\dd Part ⊞Pat	ste Batch	≡ Select Batch GP	Edi	it SO Detai Subtotal
illing address illin		Brand Brand B	Description Peas, green canned drained.		Reference	Stock 266	c 1 (	Shipping JOM Re		Confirmed							it SO Detail Subtotal 17.23
Image: Billing address       Image: Billing address <t< td=""><td>EAN</td><td></td><td></td><td></td><td>Reference</td><td></td><td></td><td>Shipping JOM Re</td><td>address</td><td></td><td>Packed</td><td>Invoiced</td><td>Price</td><td></td><td>GP</td><td></td><td>Subtotal</td></t<>	EAN				Reference			Shipping JOM Re	address		Packed	Invoiced	Price		GP		Subtotal
Add Show Price An     Part     PABP	EAN				Reference			Shipping JOM Re Jase 1	address	/ 1	Packed	0 0 0(%) 0	Price		GP -4.42	% (-25.65%) 5: t: 1:	Subtotal

(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"

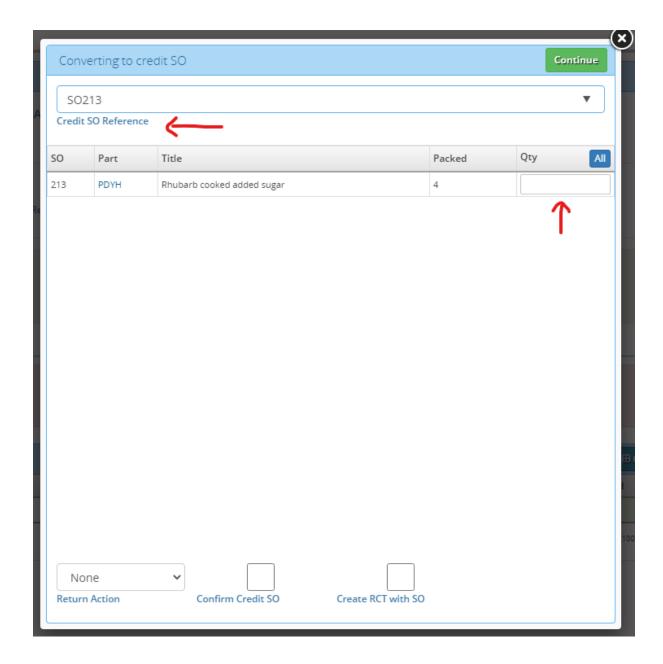
- 1. First, we go to the SO with the item/s that we would like to resend/refund to the customer.
- 2. Click the red setting icon at the top of the SO page.
- 3. Click create credit SO



50000148												<b>0</b>	nconfirmed $ ightarrow$ C	onfirme	d Edit SC
16/06/2020		[C-BGBPP]	Champlin LLC		Standard						Merge dispatch	ı	Carrier		
50 Date		Customer			VAT Group			Sales Re	ep		Send Order No	tification	Preferred Carrier		<b>a</b> ;
Main Warehou	ise			COD			GBP 1	Spli	it	16/06/20:	Duplicate SO			100.00%	
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Lebsack-O'Ke	eefe						Lebsack-G				Create Credit S Quick Resend	• ←			
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	Price Analysis EAN S00001000005Z	Apple	Smartphone.	Reference	1415 J	<b><u>160</u></b> Unit	M Requested 1 3	eveport,LA ites ess Confirmed	Packed 2	Invoiced	Price		GP 1,211.34	50.47 %	2,400.00 0.00
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- 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.
- 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.



Conve	erting to cre	dit SO			Continue
1234	1				
Credit S	O Reference				
so	Part	Title		Packed	Qty A
134	PEPE	Margarine - Regular, hard		1	
134	PBAG	Peanut Butter		20	
Nor	ne	→ ←			
Nor Nor Rest	ne end	Confirm Credit SO	Create RCT with St	D	

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.

Cr	edit SC	000265												N	ew Credit SO	
Cred	it SO000265												•	Unconfirmed	d > Confirm	med Edit SO
18/02 SO Dat	2/2021 te		[E-LDZQF] E	rnser-Koepp		Standard VAT Group				Sales Rep		Send Ord	er Notification	Preferred	Carrier	e
Main Wareh	Warehouse		INV103 Customer Refe	erence (PO)	COD Terms			USD	1.296033 ency Rate	Dispatch	02/09/20 Dispatch S	Resend	<u> </u>	Progress	100.00	%
Reser Return	nd n Action		Pending Action Status		Ξ											
897 627 Unit	ser-Koepp 6 Grim Center 05,Springfield,I ted States address	L						89 62 Ur	nser-Koepp 76 Grim Center 705,Springfield,I iited States ping address	L						
	M Show Price A	nalysis									🗄 Create Part	▼ 🛛 🖶 Add Pa	rt 🖩 Paste Ba	itch 🗮 Select	Batch	Edit SO Details
🗌 Pa		EAN	Brand	Description		Reference	Stock	UOM	Requested	Confirmed		Invoiced	Price	Discount	GP	Subtotal
PA 1 L	FE 🚺	4011200296908	Brand B	Water chestnuts canned sli	ced		48.25	Case	4	4	4 (100%)	0 0 0.00	2 324.80		0.00 Cr	1,299.20
														Di	Gross: scount: ibtotal: VAT:	USD 1,299.20 USD 0.00 USD 1,299.20 USD 259.84
																USD 1,559.04

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					Continue	
QF]	SO	Part	Title		Packed	Qty A	JI I
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## After you press continue it will take you to the "Resend SO" $% \mathcal{O}(\mathcal{O})$

SC	00026	6 Rese	end											New Sale:	s Order	
						SO Does not r	natch this min	imum requi	ed GP for all it	ems						
SO	0000266												•	Unconfirmed $ ightarrow$	Confirm	ed Edit SO
18/	/02/2021		[E-LDZQF] E	Ernser-Koepp		Standard										
SO I	Date		Customer			VAT Group			9	Sales Rep		Picki	ng	Preferred Carrie	r	2
Ma	ain Warehouse		INV103		COD			USD	1.296033		02/09/2020	09/09/	2020			
War	rehouse		Customer Re	ference (PO)	Terms			Currency	Rate	Dispatch	Dispatch Start	Deliver	y Due	Progress		
89 62 U	rnser-Koepp 1976 Grim Center 12705, Springfield, Inited States ing address							8976 0 62705	r-Koepp Grim Center ,Springfield,IL d States address							
	I M 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	4	0 (0%)	0 0.00	∕ 0.00 ♦		0.00	0.00
														Total Gros	s:	USD 0.00
														Discoun		USD 0.00
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																USD 0.00



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

	73											🔹 Unconfi	rmed 🕥 (	Confirmed	Edit SC
23/09/2020			Champlin LLC		Standa										
O Date		Customer			VAT Grou	ib		Sales Re	P		Picking	Prefe	erred Carrier		
Main Warehous	5e	SO148		COI	D		GBP 1			16/06/2020	16/06/2020			100.00%	
Warehouse		Customer R	eference (PO)	Terr	ns		Currency Ra	te Disp	atch	Dispatch Start	Delivery Due	Prog	ress		
Refund		Complete	_	∝ ←											
Return Action		Action Statu	, <del>(</del>												
8870 Buena Vi	ista Pass														
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United States billing address  Lad Show Pr Part	rice Analysis EAN	Brand	Description	Reference	Stock	UOM	71105,Shr United St Shipping add	eveport,LA ates ress Confirmed	Packed	Invoiced	Price	ste Batch 🗮 S Discount	elect Batch GP	Sub	SO Detrail total
United States illing address	rice Analysis	Brand Apple	Description Smartphone.	Reference	Stock 1416	UOM Lat 160 Unit	71105,Shr United St Shipping add	eveport,LA ates ress	Packed						total
United States ling address	rice Analysis EAN			Reference			71105,Shr United St Shipping add	eveport,LA ates ress Confirmed	Packed	0 00%) 0	Price	Discount	GP	Sub 1,20	total
United States illing address III And Show P Part Ipn	rice Analysis EAN			Reference			71105,Shr United St Shipping add	eveport,LA ates ress Confirmed	Packed	0 00%) 0	Price	Discount	GP 0.00 Cr	Sub 1,20 : GB	total 0.00

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 Invoice Generate Credit No	te Mark Processed
Related Documents	Attachments Choose Files No file cho	Refresh	쯓 Subscribers	Select 4+
Print	Description Select File			
≣ Show Log	Notes	Refresh		
🗅 Export	Add a comment. @ to mention a person.	4		$(\uparrow)$

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



S	D   Sal	les Oi	rd	er		$\rightarrow$	Manage Returns         Manage Picking •         Received Payments         Dispatch Merge         Repeating         Rules         New Sales Order							
	All			~	Any 🔻	Any	Any			▼ A	74		✓ Any	Ivanced Search Q Search
	rehouse				Туре	Customers	Status			Pack			Invoiced	
0	1													III Export
	SO		Ту	pe	Date	Customer		PO	Total	Currency	Status	Packing	Invoice	Shipment
	SO000174		• C	edit	23/09/2020	Champlin LLC		SO148	-280.52	GBP	Unconfirmed	Complete	Pending	Delivered
	SO000173		• 0	edit	23/09/2020	Champlin LLC	8	SO148	-1,200.00	GBP	Confirmed	Complete	Pending	Delivered
	SO000172	<	<ul> <li>Or</li> </ul>	der	23/09/2020	A Gold Technology	8		0.00	GBP	Confirmed	⊖ Pending	Pending	Unshipped
	SO000171		Or	der	23/09/2020	Customer	8		0.00	GBP	Confirmed	🕀 Complete	Pending	Unshipped
	SO000168		e Cr	edit	22/09/2020	A Gold Technology	8		0.00	GBP	Confirmed	Complete	Pending	Delivered
	SO000167		• Or	der	22/09/2020	Lebsack-O'Keefe	8	XXX	0.00	GBP	Confirmed	⊖ Complete	Pending	Unshipped
	SO000166	<	<ul> <li>Or</li> </ul>	der	22/09/2020	Beahan LLC			0.00	USD	Unconfirmed	Pending	Pending	Unshipped
	SO000164		<ul> <li>Or</li> </ul>	der	14/09/2020	Customer	8		17.23	GBP	Confirmed	🖶 Complete	Pending	Unshipped
	SO000163		Or	der	07/09/2020	Currys PC World Featuring Carphone Warehouse	8		0.67	GBP	Confirmed	Pending	Pending	Unshipped
	SO000162	(	<ul> <li>Or</li> </ul>	der	02/09/2020	Ernser-Koepp	8		92,596.61	USD	Confirmed	🖶 Complete	Complete	1 Unshipped
	SO000161		<ul> <li>Or</li> </ul>	der	02/09/2020	A Gold Technology	8		5.316.27	GBP	Confirmed	e Partially	Pending	Unshipped
	SO000160		<ul> <li>Or</li> </ul>	der	04/08/2020	Lebsack and Sons	8		1,331.99	GBP	Confirmed	Pending	Pending	Unshipped
	SO000159		Or	der	04/08/2020	Beahan LLC	8		471.75	USD	Confirmed	🖶 Complete	Pending	Unshipped
	SO000158	<	<ul> <li>Or</li> </ul>	der	03/08/2020	Alan Chow	8		168.28	GBP	Confirmed	₽ Pending	Pending	Unshipped
	SO000157	<	<ul> <li>Or</li> </ul>	der	23/07/2020	A C	8		132.00	GBP	Confirmed	⊖ Pending	Pending	Unshipped
	SO000156		• Or	der	13/07/2020	Lebsack-O'Keefe	8	XXX	1,232.84	GBP	Confirmed	🖶 Complete	Complete	1 Pending Pickup
	SO000155		Or	der	18/06/2020	A C	8		5,528.64	GBP	Confirmed	Partially	Pending	Unshipped
	SO000154	<	<ul> <li>Or</li> </ul>	der	18/06/2020	A C	a		1,376.50	GBP	Confirmed	➡ Pending	Pending	Unshipped
	SO000151	<	<ul> <li>Or</li> </ul>	der	17/06/2020	A C			2,325.60	GBP	Unconfirmed	Pending	Pending	Unshipped
	SO000150	1%	Or	der	17/06/2020	A C	8		259.08	GBP	Confirmed	🖶 Complete	Complete	1 Unshipped
	SO000149	•	<ul> <li>Or</li> </ul>	der	17/06/2020	Lynch, Bode and Abernathy			0.00	USD	Unconfirmed	Pending	Pending	Unshipped
-				***	1010010000				3 200 23	c	e	D constant	Deadlas	( loop loop of

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.

