exigo

Return Orders

v 1.1

Contents

Return Orders

To create a return order and process a credit card refund:

1.   Go to Customer > Customer Search and find the customer that wishes to return an order.

2.   From the Customer screen, click on Orders/Invoices in the left menu.

3.   In the top right tool bar, click on Return Order.

4.   When the Pick Order screen appears, you can locate the order that is being returned by the Order ID.

5.   Enter the search criteria and then click on Search.

6.   Click on the order you are returning.

7.   When the Order screen appears, navigate to the Items tab. You may perform the following actions:

      a.   For complete return, verify the items and the negative quantities.

      b.   For partial return, remove the line item of any products that are not being returned or edit a line item to adjust the quantity to reflect the count being returned.

      c.   You may also add an item with a positive quantity for any restocking fees or any other charges you need to add to offset the amount of the return.

      d.   You will be able to change the warehouse if you do not want the inventory to go back into your counts for the original warehouse. You may want to setup a warehouse for Returns or Damaged Inventory.

      e.   If it is a return of a component from a kit, remove the kit from the items tab and then add a negative quantity for the item sku.

8.   From the Payment tab, you may make any adjustments to the tax or shipping depending upon your procedure for returns.

      a.   To not allow for shipping to be refunded, click on the Override Shipping button, and enter a zero or partial amount.

      b.   To not allow for a refund of tax, click on the Override Tax button and enter a zero or partial amount.

      c.   Note: Any values that are listed in parenthesis will be included in the credit amount.

9.   Once you have the final amount in the bottom left corner of the Payment tab, you may now add a Refund to the order. Click on the Add Payment button in the top left and the payment popup will appear. If the original payment was made by credit card, you may now click on the Authorize Now button to send a credit request to the credit card account shown. Make sure to keep the negative amount shown.

10.   Once you have added the refund, you can click on Finish, a new Order ID will be assigned to the order and the value of the return will be credited to the Customer's account.

11.   The status of the new order will be listed as Accepted but will not appear in the Accepted basket of the Invoice section.

12.   If the product is returned to inventory, you will need to mark the order as 'Shipped' for the inventory counts to adjust.

Order Cancellation

To cancel an order:

1.   Go to the Customer's Detail screen and click Orders/Invoices.

2.   Double click on the Order to be cancelled.

3.   From the Invoice screen, edit the order and go to the Payment tab.

4.   Click on the button **Change Status** and select Cancelled.

5.   Click on Finish and the order will be listed as Cancelled.

6.   You should never cancel an order that has a payment unless you purposefully want a credit on the Customer's account.

7.   If there was no payment collected for the order, then no adjustment to the balance is necessary.

How to do an Exchange

Return the product and then instead of issuing a refund, create a new order and apply credit on account towards the order.

Replacement Orders

You can enter replacement orders where an existing order that was shipped is damaged or lost.

1.   Go to Customer > Customer Search and find the customer that you need the replacement order for.

2.   From the Customer screen, click on Orders/Invoices in the left menu.

3.   In the top right tool bar, click on Replace Order and then search for the old order that is being replaced.

4.   The feature will create a new order with a new order ID and duplicate the original order with zero price and zero volume. The order status is Accepted without entering any payment information and will appear in the Accepted basket. Once you view the order, you can click on the Detail Report at the top of the Order display screen and then view the replacement order ID (the old order it is replacing). The source is shown as Replacement Order.

Return Merchandise Authorization (RMA)

When you edit an order that has already been shipped, you will see a new field on the Payment tab of the order called RMA Number. When you click on the box, it will ask if the RMA is authorized, if you check the box and click on OK, then an RMA number is generated and displayed. The status of the Order is now listed as RMA - Shipped. When you use the Return Order feature, the returned order ID is shown on the Item and Payment Screen.