

Returns (aka RMAs)

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Summary

Use this screen to view and manage RMAs (return merchandise authorisation); return requests and process the return of Stock.

Cancellation requests are not excluded from this function; this is purely for returns


Key to Icons

 = requested

 = authorised

 = declined/rejected/cancelled

 = received/partially received

 = approved

 = completed

What is an RMA?

A Return may be requested by the Customer via the website after an item has been delivered to them, or may be created when an item is returned in the CMS or POS.

If a request is fasttracked in the POS or CMS, an RMA will not be created; the User must specifically trigger the RMA process

To create an RMA from the CMS, the User must use the 'create RMA' action button on the Product Detail Page.

Creating a new RMA

Click [here](#) for a full guide on how to create a new RMA.

RMA Management

To manage an RMA, click on the RMA Id.

For more information, click [here](#).

RMA (Detail)

Return RMA78

[View returns](#)

Approved

Order Details

Order ID: [Z4664](#) Customer: [Mr O Smith](#) Email: test@iconography.co.uk Telephone: 01460258530

Mark as completed

Return Details

Requested action: Refund

Code	Name	Unit Price	Qty	Received	Approved	Cancel
705629	Orla Kiely Mimosa L Shape Large Chaise Sofa Grade A Fabric:A081-Boucle-Jute,Scatter Cushions:3663 Reason: Damaged	£1,050.00	1	<input checked="" type="checkbox"/> 01/11/2023	<input checked="" type="checkbox"/> UK Warehouse (Returned Goods)	
nameday	Delivery	£0.00	1			

Restocking Fee:

Total Refund Due: **£1,050.00**

Notes

[+ Add a note](#)

Return Audit History

- Updated return to approved by iconography at 02/11/2023 11:26:07
- Return line 705629 approved by iconography at 02/11/2023 11:26:07



Use the tick boxes to process the RMA line item (it is possible to have multiple items on a single RMA)

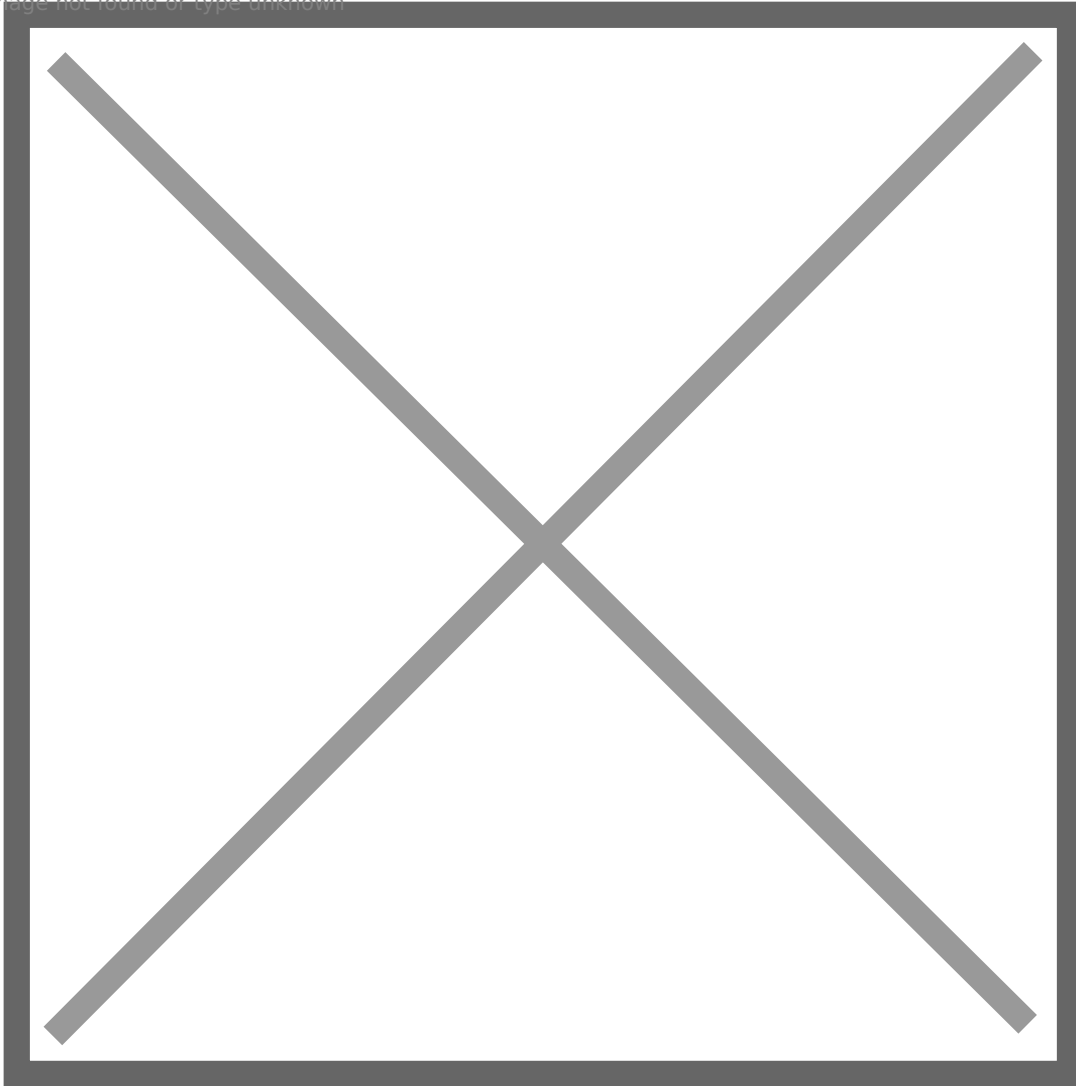
For a complete guide to setting up and managing an RMA, click [here](#).

You can also add [Notes and Tasks](#) to RMA

Create a new RMA

1. Click "Add new return"

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2. Search for a Sales Order

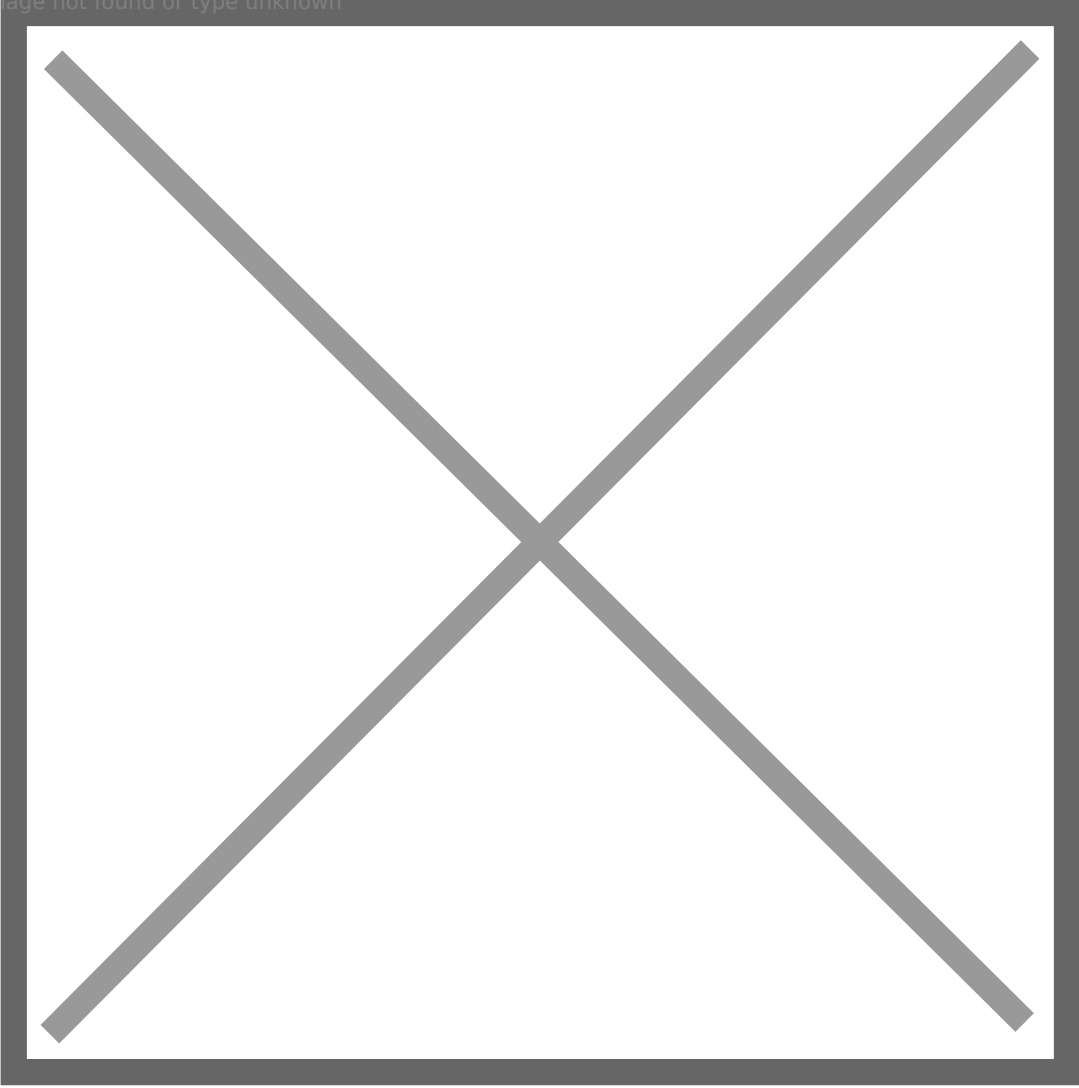
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Tip: This can also be done directly from the Sales Oder Detail screen

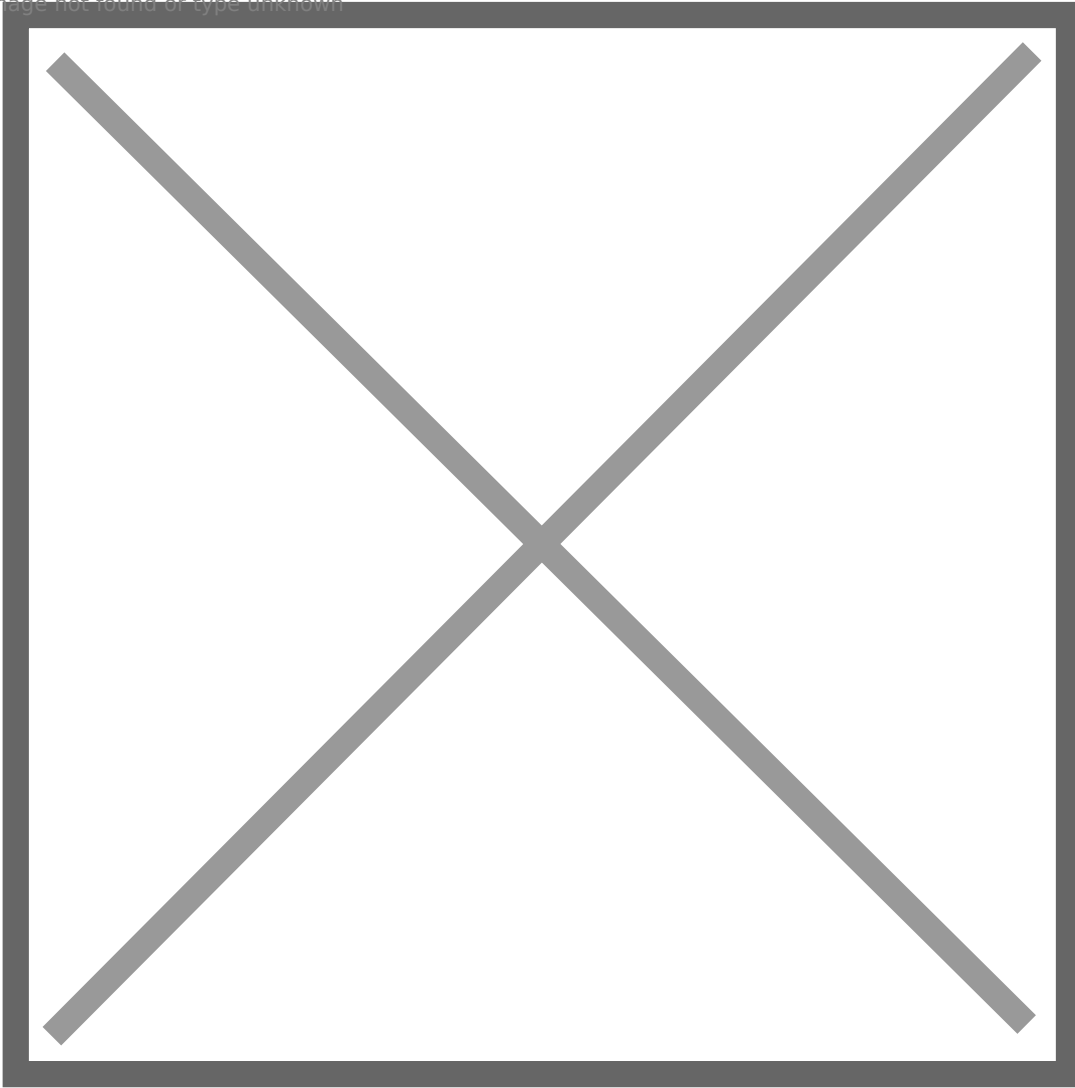
3. Click "Create return"

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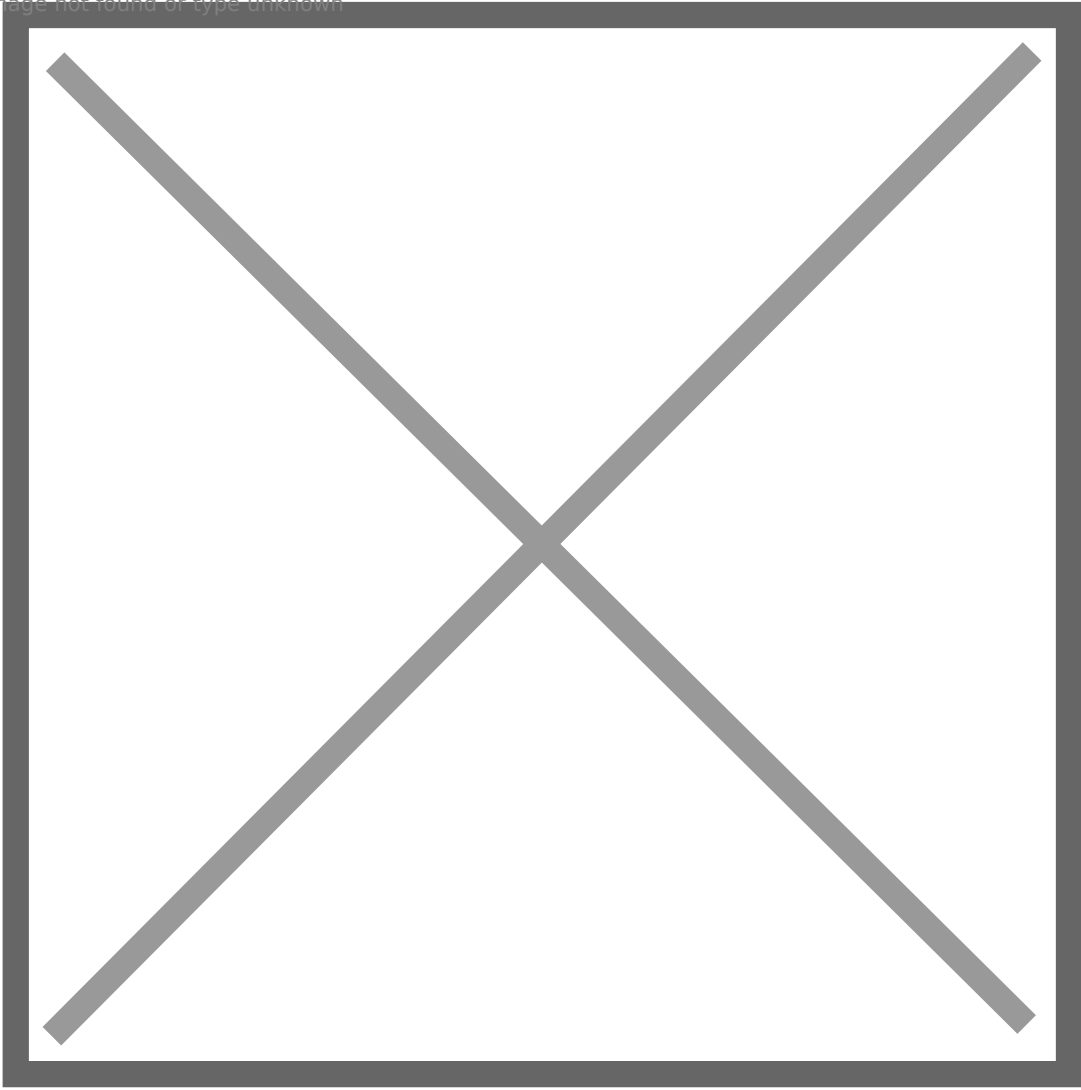
4. Select the items to return

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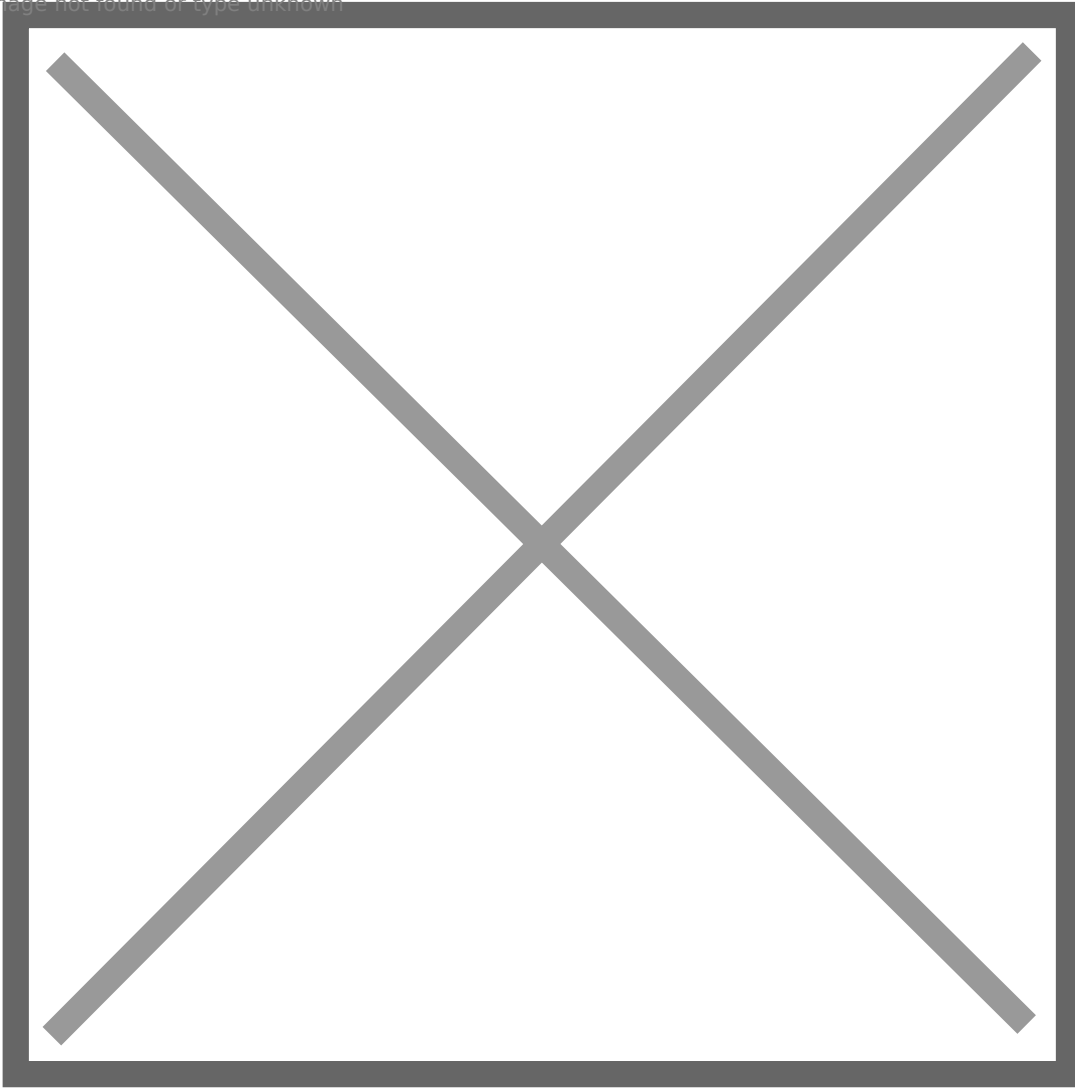
5. Optionally select reasons and requested actions, as well as adding notes

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6. Click "Create return"

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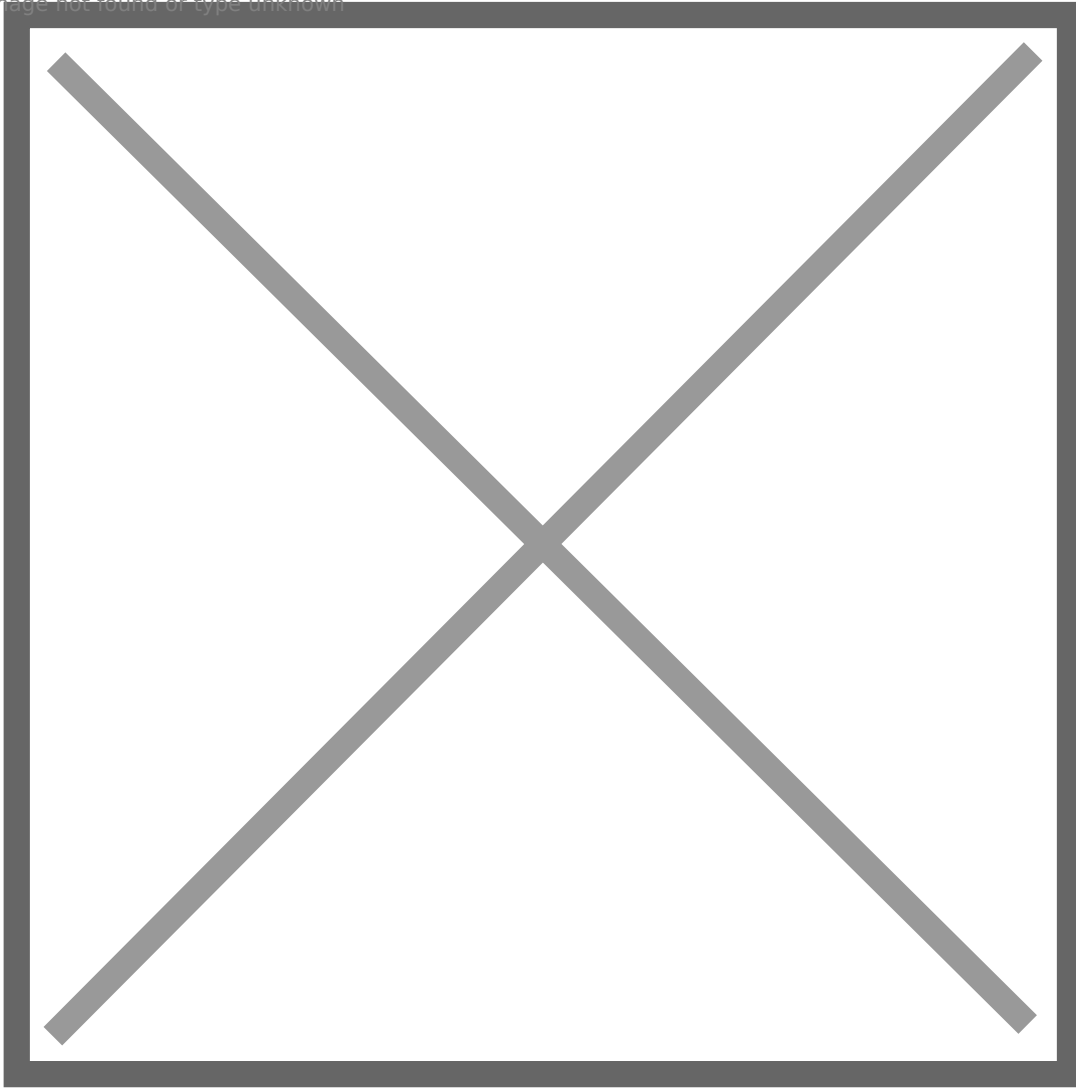


7. Your RMA is now created

To authorise the Customer's request, click Authorise. This will generate an email.

Alternatively, decline the customer. They will be informed by email.

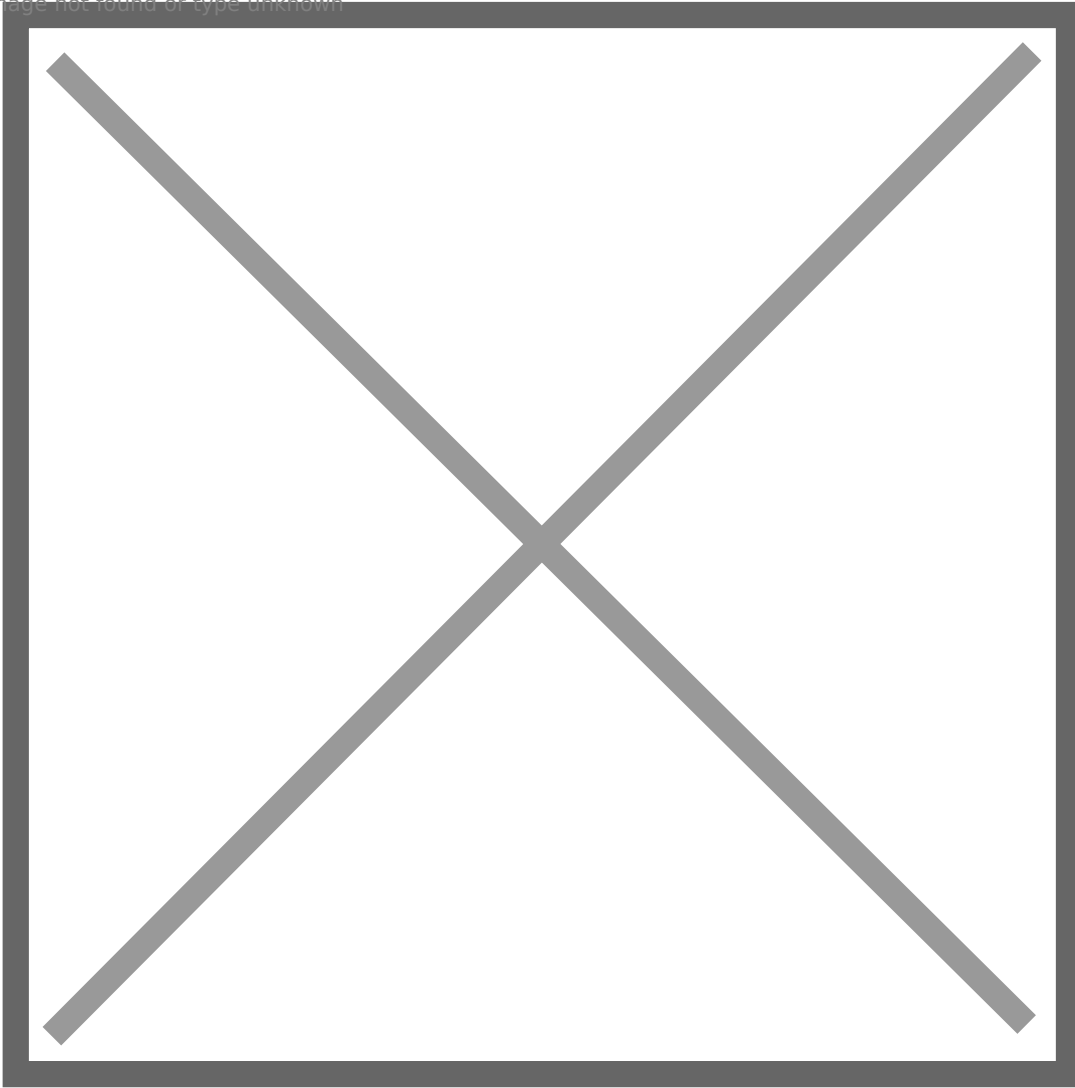
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8. To mark the items are received, mark the line appropriately.

If you are a furniture retailer, you may need to return the goods to a Location terms 'Customer House'.

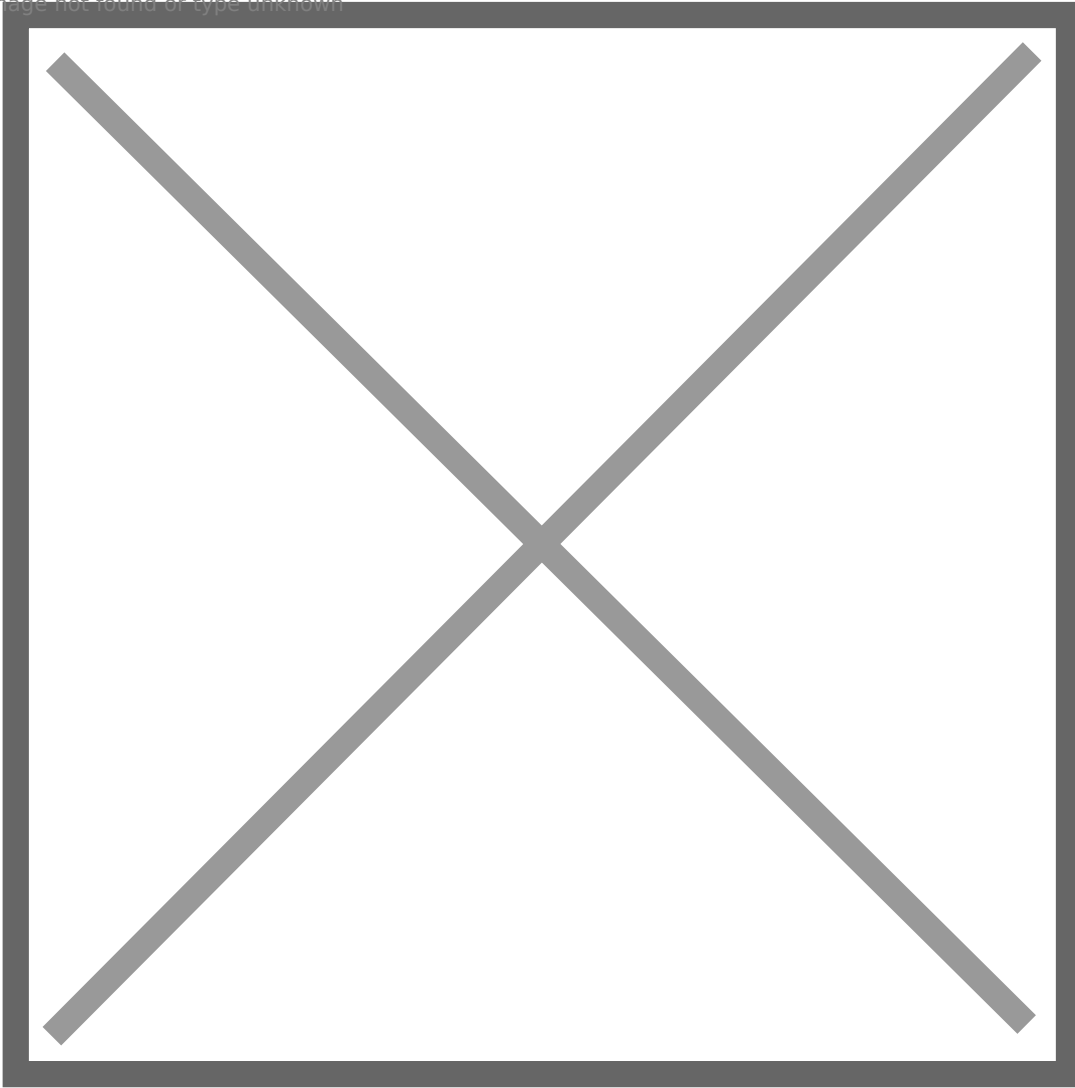
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Tip: You can also cancel individual lines by using the 'Cancel' column.

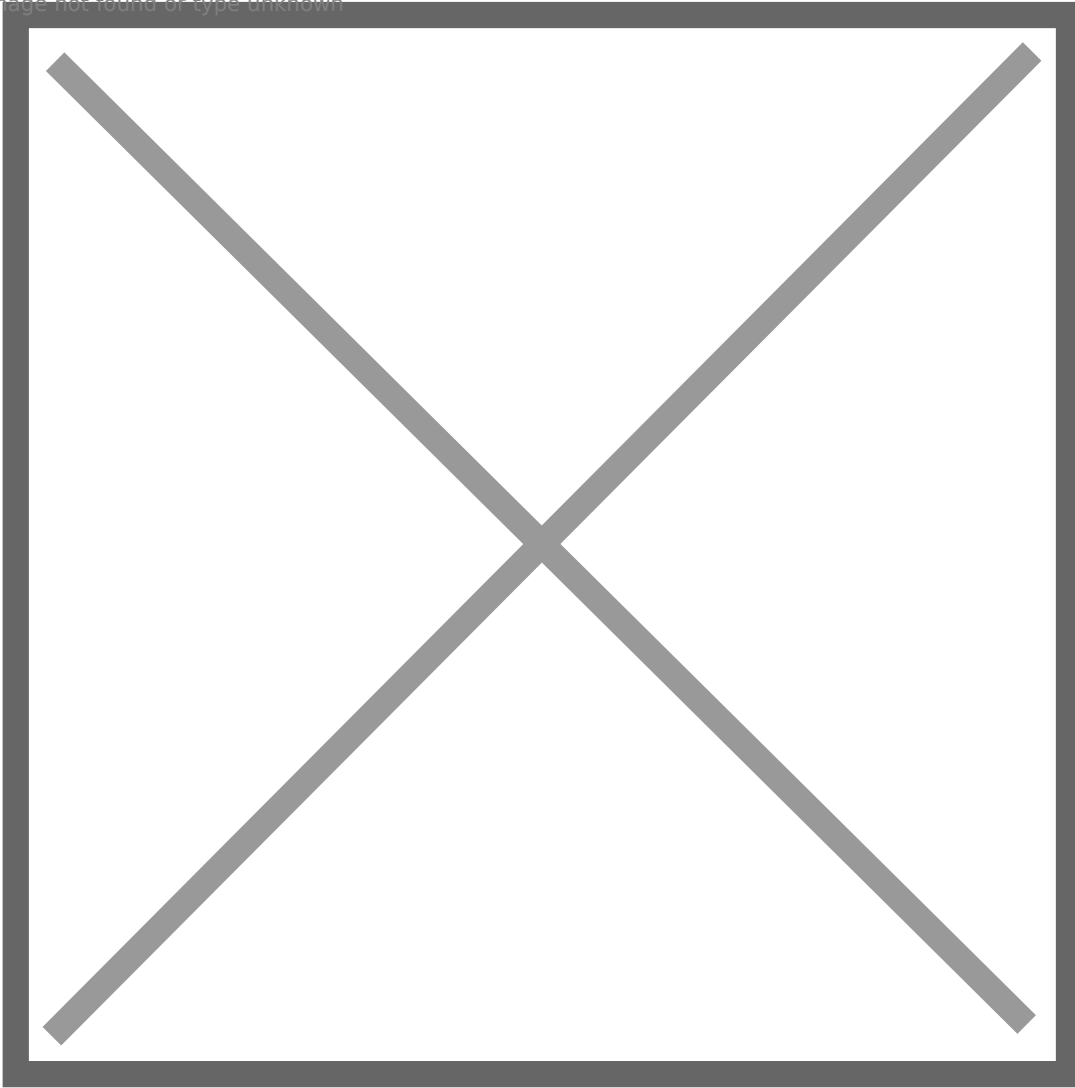
9. Click "Update items" to save your changes

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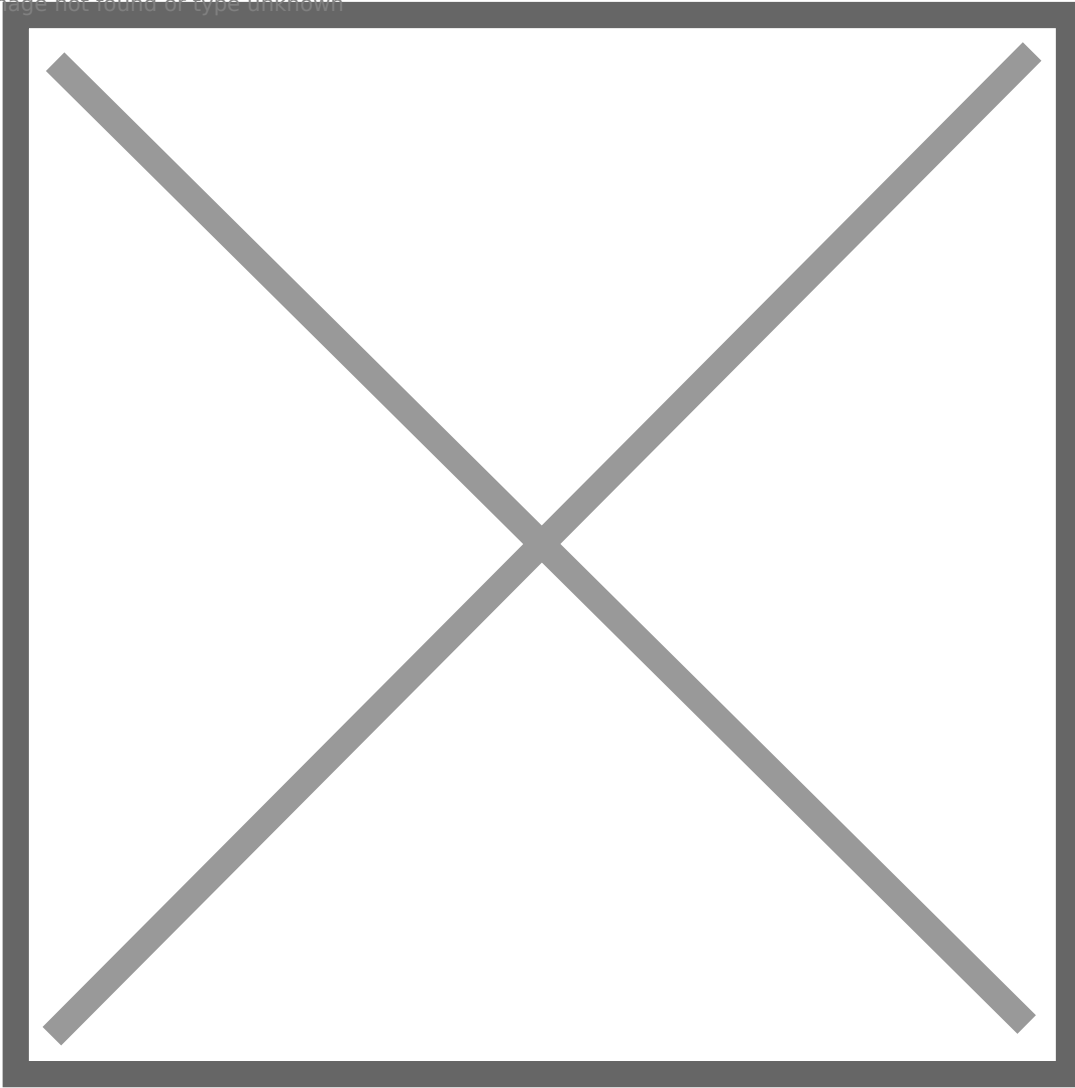
10. To choose a Location to which the items will be received, click [here](#).

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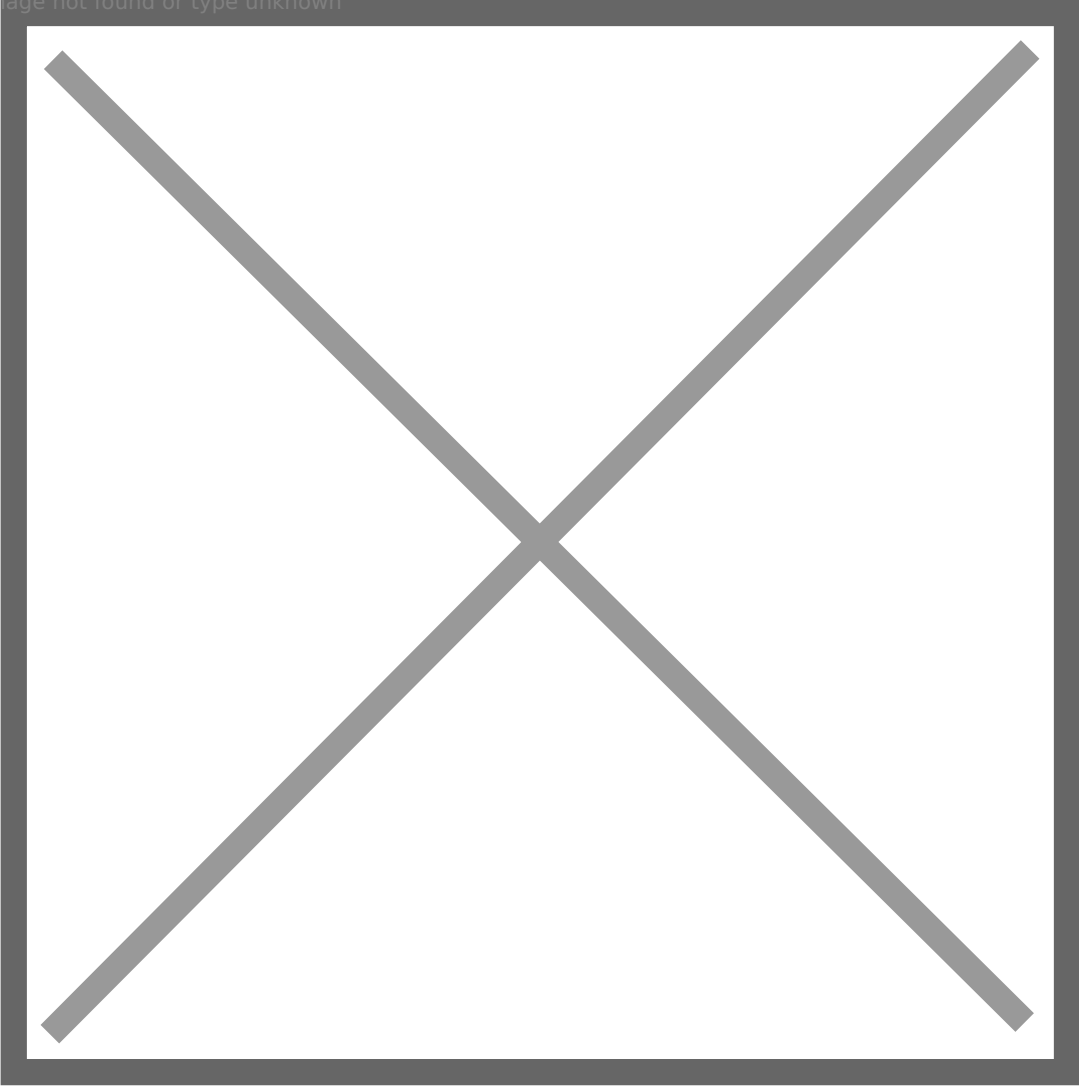
11. You may optionally create a Supplier Return when receiving these goods.

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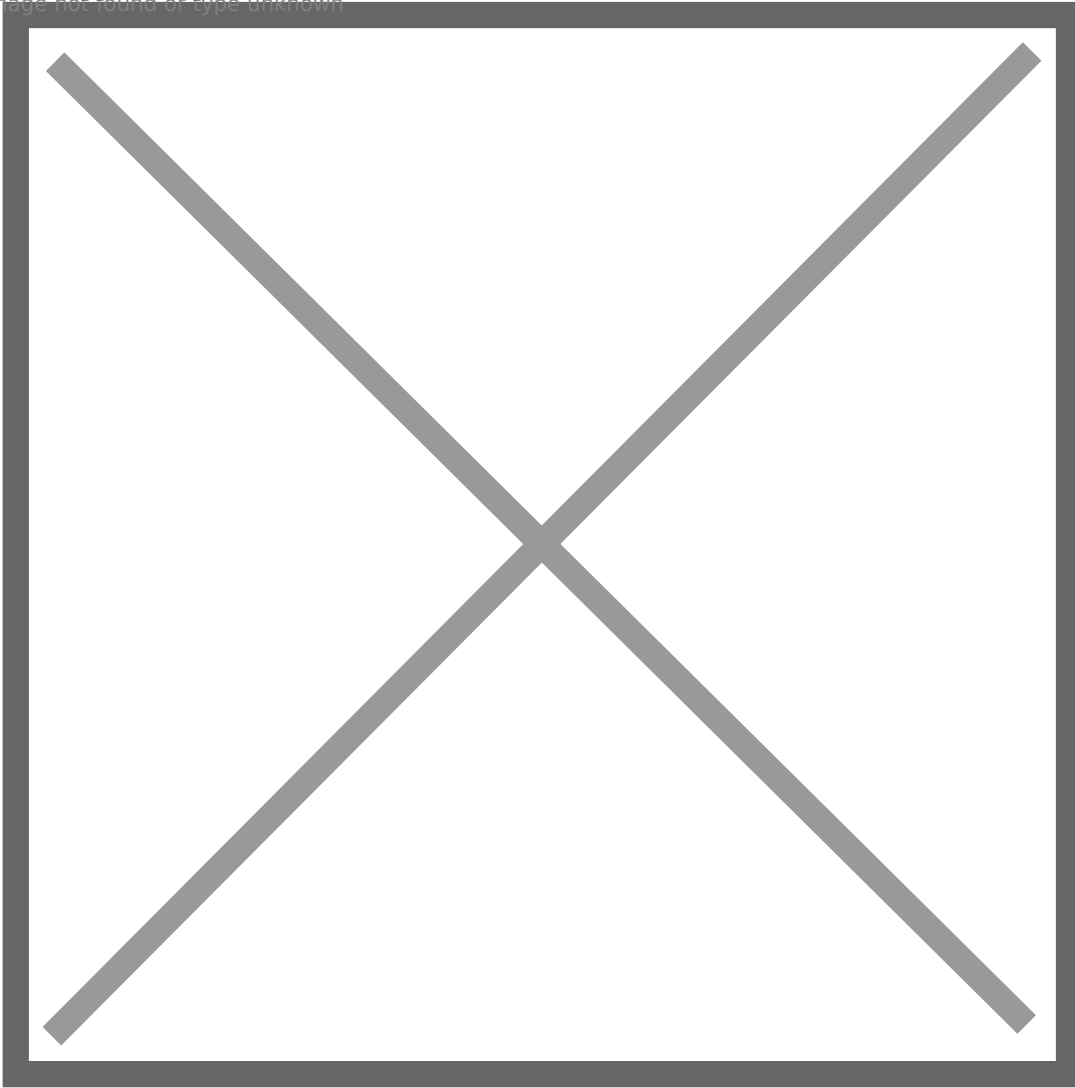
12. Use this control to add a restocking fee; this will be deducted from the refund value.

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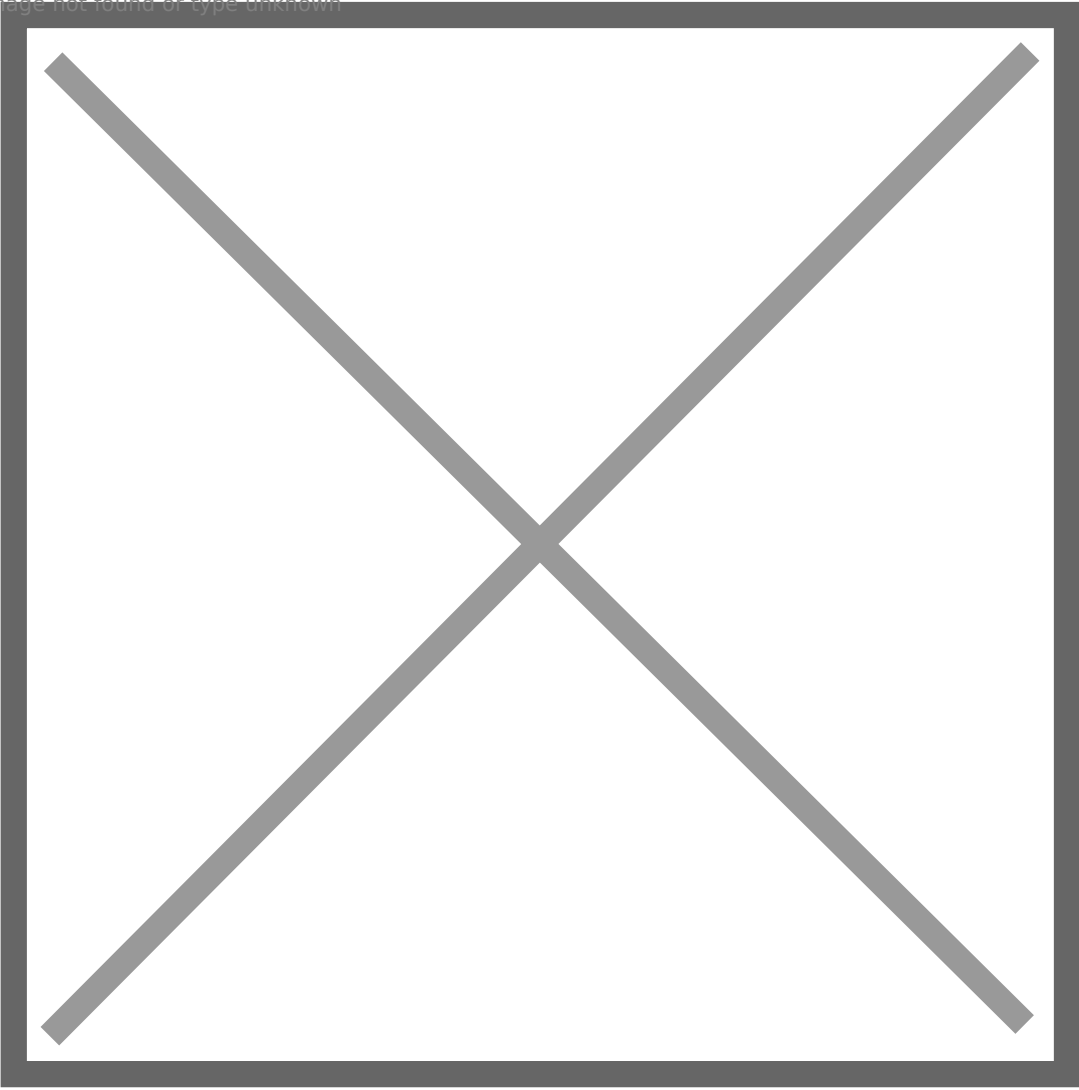
13. If required, click "Process Refund"

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14. This will open the Sales Order Detail screen, which which you can process a refund as normal.

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Recommended Setup (Furniture Retailers)

When furniture retailers are processing returns, it is recommended to use a 'Customer House' Store/Location. This will allow you to keep track of stock held in a Customer's house.

When ready, simply use the Stock Transfer function to move that stock back into one of your Stores; this can be scheduled alongside delivery of the replacement item.