

Processing an Exchange

This process may only be managed within the full CMS, and not via the POS.

When an item is returned, it may be marked as 'exchange required'.

Packed	Delivered	Return
	-	<input checked="" type="checkbox"/>

Reason

Location

Exchange?

Create supplier return?

The journey is similar if the Return is managed through the [RMA process](#)

New Sales Order

Processing a return marked as an exchange will create a new linked Sales Order.

Packed	Despatch	Return	Tracking
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Unspecified Exchange Z7255	

This new Sales Order will be created without any Products and the User will need to add Products accordingly.

Transfer Payment

There will be a payment discrepancy on any Sales Order with a returned line - this will be flagged as Refund Pending.

If the 'Transfer' button is pressed, it will transfer that balance to the linked Sales Order.

Refund Pending

Cash

Card (in person)

Account

Manual

Voucher

Transfer

14.25 REFUND NEEDED

This will then display on the new Sales Order as a credit.

EXCHANGE: 17/06/2026 16:53 **45.00 GBP** ✓ CREDIT XT38ZSRLGXVBHHWQN from 6923

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