

# Online Returns

Is this feature disabled?



Contact To Enable

Enabling this feature needs consultation with Commerce Vision.

## Overview

Online retailers experience 3x as many returns as brick and mortar stores, and the processing of these returns is a costly overhead for most businesses. Being able to accept and track returns online can streamline the process for both you and the customer.

The Online Returns feature manages return requests from the order details page. Its builtin range of settings and options allow returns to be configured to suit your business practices and policies. Online returns are also integrated back to your ERP so they can be managed as part of your normal returns process.

## Features

- Allows easy return with one-click from order details page
- Validates that items are returnable/non-returnable
- Allow one or multiple returns per order
- Restrict return to certain order types
- Set a return time frame window
- Auto-send return-related emails at key stages of the process
- Set rule to handle low value returns

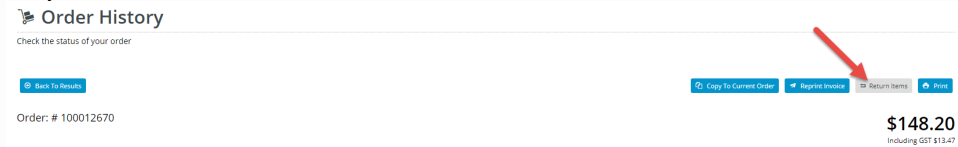
## Your Customer Experience

### On this page:

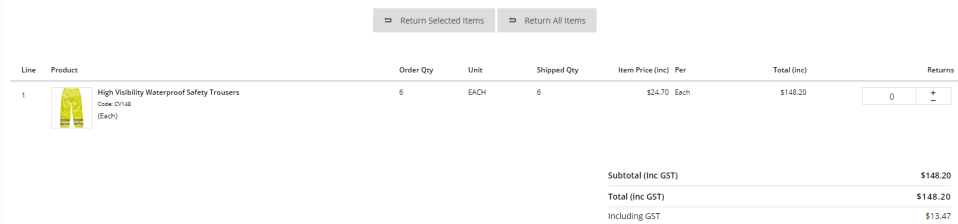
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## Returns procedure

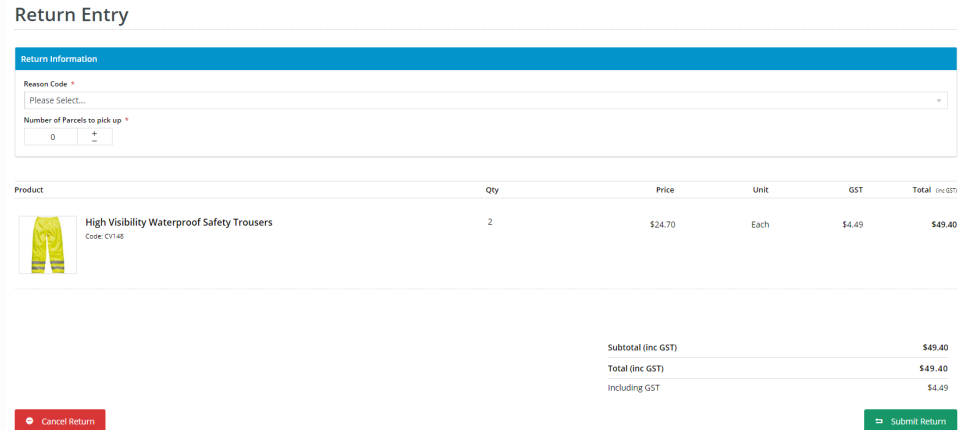
1. The user logs in and opens the order ([Order Tracking/History](#)). If the order contains returnable lines, the **Return Items** button is displayed. The user clicks it to start the return.



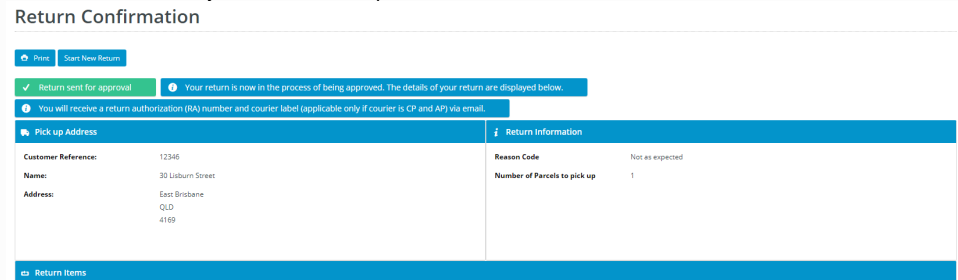
2. If there are multiple returnable items, they can select the number of items on each returnable line and click **Return Selected Items**. OR to return all returnable items, they click **Return All Items**.



3. The user enters pickup and return information, e.g., return reason, number of parcels, whether the stock is in resellable condition, etc. What they need to enter depends on your settings.



4. The user submits the return. The confirmation page details shipping information. If the low stock value rule is on and the return value falls below it, they will be told to keep the stock.



5. Depending on your settings, the user may receive an email confirming the return submission. The online return integrates back to your ERP and is managed as part of your normal business process for returns.

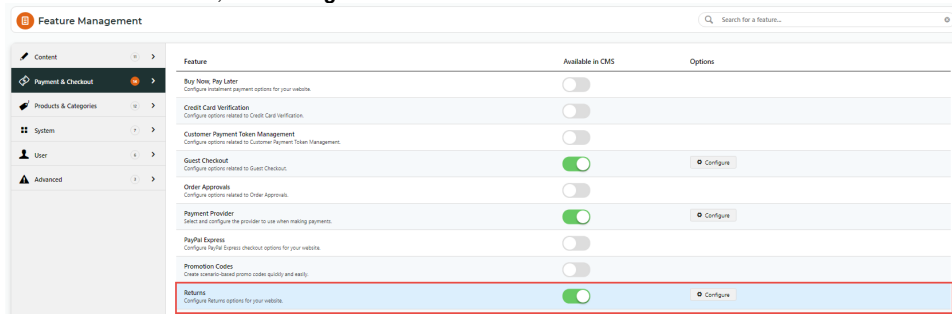
## Step-by-step Guide

### 1. Configure Online Returns

1. In the CMS, go to **Settings Settings Feature Management**.

2. Select the **Payment & Checkout** tab.

3. For the **Returns** feature, click **Configure**.



4. In the **Returns Feature Settings** page, configure settings to suit your business rules.

| Setting  | Description   | Notes                         |
|--|---|-------------------------------|
| <b>Enable Returns</b>                                    | Toggles the functionality on and off for your site. <b>TIP</b> - Leave it off until you've configured all settings.   | Role overrides available.     |
| <b>Only One Return Per Order</b>                         | If ON, a user is limited to submitting one return, including part returns, on a particular order.   | Role overrides available.     |
| <b>Enable Returns for Orders with Charge Lines</b>       | If ON, allows returns against orders that have special charge lines on them, e.g., bulky freight, installation, etc.  | Role overrides available.     |
| <b>Enable Return Order Confirmation Emails</b>           | If ON, a confirmation email is sent to the user once they've submitted an online return.  |                               |
| <b>Enable Returns For Kits</b>                           | If ON, allows kit items to be eligible for returns, including kit components.   | Role overrides available.     |
| <b>Search Returns Label</b>                              | The description for the dropdown list when searching order history.   | Role overrides available.     |
| <b>Statuses of Returned Orders</b>                       | ERP status codes for orders classed as 'Returns'. Orders with these statuses will be displayed when Order History searches are filtered for 'returns'.  | Role overrides available.     |
| <b>Statuses of Returnable Orders</b>                     | ERP status codes for orders eligible for returns. Only orders with these statuses will display the 'Submit Return' button.  | Role overrides available.     |
| <b>Maximum Returns Time Frame</b>                        | The number of days (from invoice date) that an order can have a return submitted against it.  | Role overrides available.     |
| <b>Low Value Order Amount</b>                            | The dollar amount under which a return is classed as "low value". For many businesses, this stock is written off instead of being returned to inventory. The user will be eligible for an automatic refund. | Customer overrides available. |
| <b>Disable Returns for Orders With Customer Prefixes</b> | Applies only to custom implementations.   | Role overrides available.     |
| <b>Disable Returns for Orders With Service Branches</b>  | Applies only to custom implementations.   | Role overrides available.     |

|   |   |   |
|---|---|---|
| <b>Status of Submitted Return Orders</b>                  | The ERP status return orders will be set to.  |   |
| <b>Status of Submitted Low Value Return Orders</b>        | The ERP status that low value returns will be set to.   |   |
| <b>Returnable Order Confirmation Status</b>               | The ERP status that triggers the Return Order Confirmation email to be sent to the user.  |   |
| <b>Returnable Order Confirmation Low Value Status</b>     | The ERP status that triggers the Return Order Confirmation email to be sent to the user (for low value returns).  |   |
| <b>Default Warehouse Code for Low Value Return Orders</b> | The warehouse code that low value returns are processed against (since stock is not being returned to inventory).   |   |
| <b>Default Order Type for Return Orders</b>               | Defines the order type for submitted return orders.   | Integrates to the SoOrderTypeCode in PRONTO sales order.  |
| <b>Return Information Widget Field Group</b>              | The JSON field group that determines the displayed fields for the <a href="#">Return Information Widget</a> .   | Defaults to ReturnInformationFieldGroup, which includes the following Pronto Sales Order table fields: <ul style="list-style-type: none"> <li>• SoOrderPackages</li> <li>• SoOrderReasonCode</li> <li>• ReturnReason</li> </ul> |
| <b>Return Information Widget Resalable Field Name</b>     | Defines the 'resaleable' field (from the JSON field group) that gets displayed by the <a href="#">Return Information Widget</a> .   | Defaults to CM_ReturnResalable  |
| <b>Enable Product Quantity Check on Return Request?</b>   | If ON, the order return history is checked to ensure the current requested return quantity of a product plus any quantities in previous returns for this order are not greater than the shipped quantity. If it is, the return cannot be submitted. | Default: OFF<br>Role overrides available.   |
| <b>Enable Refund Limit Check on Return Request?</b>       | If ON, the order return history is checked to ensure the requested refund amount plus any amount previously returned is not greater than the original order amount. If it is, the return cannot be submitted.                                       | Default: OFF<br>Role overrides available.   |

5. Click **Save**

## 2. Add Return Reasons

You'll also need to set up the Reason Codes so that customers can choose a valid return reason.

- Maintain Return Reasons

3. *Enter the return details:*

4. **Save** and repeat Steps 2-4 to add all required reason codes.

| Code | Description      | Resalable | Admin Fee |   |
|------|------------------|-----------|-----------|---|
| 01   | Change of Mind   | Yes       | No Fee    | <a href="#">✎ Edit</a> <a href="#">✖ Delete</a> |
| 02   | Customer Error   | No        | No Fee    | <a href="#">✎ Edit</a> <a href="#">✖ Delete</a> |
| 04   | Wrong Stock Sent | Yes       | No Fee    | <a href="#">✎ Edit</a> <a href="#">✖ Delete</a> |
| 99   | Faulty           | No        | No Fee    | <a href="#">✎ Edit</a> <a href="#">✖ Delete</a> |

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1 - 4 of 4 items

The Online Returns feature includes content displayed to users as they go through the returns process. Below are the templates and related widgets that can be customised.

Order History is where the user starts a return. You can customise the text on the buttons, error messages, and tooltips.

|  |  | <a href="#">Return Items Indicated Below</a> |      | <a href="#">Return All Items</a> |                 | <a href="#">Hide Non Returnable Lines</a> |            |   |
|--|--|--|------|----------------------------------|-----------------|---|------------|---|
| Line                                       | Product  | Order Qty                                    | Unit | Backorder Qty                    | Item Price (ex) | Per                                       | Total (ex) | Returns   |
| 1  |  Scotch Magic Tape, 12mmW x 66M<br>Code: C1272<br>(ROLL)            | 1  | ROLL | 0                                | \$5.50          | ROLL                                      | \$5.23     | <input type="text" value="0"/> <input type="button" value="+"/><br><input type="button" value="-"/> |
| 2  |  Scotch Magic Tape, 12mmW x 33M<br>Code: C1273<br>(ROLL)            | 1  | ROLL | 0                                | \$3.25          | ROLL                                      | \$3.09     | <input type="text" value="1"/> <input type="button" value="+"/><br><input type="button" value="-"/> |
| 3  |  Scotch Magic Tape, 19mmW X 66M<br>Code: C1274<br>(ROLL)            | 1  | ROLL | 0                                | \$6.95          | ROLL                                      | \$6.60     | <input type="text" value="0"/> <input type="button" value="+"/><br><input type="button" value="-"/> |
| 4  |  Scotch Magic Tape, 19mmW X 33M<br>Code: C1275<br>(ROLL)            | 1  | ROLL | 0                                | \$4.25          | ROLL                                      | \$4.04     | <input type="text" value="1"/> <input type="button" value="+"/><br><input type="button" value="-"/> |
| 5  |  General Purpose Tape, 18mmW x 66M, 6 Pack<br>Code: C1276<br>(Pack) | 1  | PACK | 0                                | \$6.95          | PACK                                      | \$6.60     | <input type="text" value="0"/> <input type="button" value="+"/><br><input type="button" value="-"/> |
| 6  |  General Purpose Tape, 24mMW x 66M, 6 Pack<br>Code: C1277<br>(Pack) | 1  | PACK | 0                                | \$8.95          | PACK                                      | \$8.50     | <input type="text" value="0"/> <input type="button" value="+"/><br><input type="button" value="-"/> |
| Australia Post (orders < \$100)<br>Charges |  |  |      |                                  |                 |   | \$10.45    |                |

1. Go to **Content** **Content** **Pages & Templates**.
2. Use **Search** to find the **Track Orders** template, then click **Edit**.

3. Find the **Track Order** widget, then click **Edit**.

4. Select the **Returns** tab on the left hand side to view all return-related options. See: [Track Order Widget](#).

The screenshot shows the 'Track Order' widget's configuration interface. On the left is a sidebar with a search bar and a list of tabs: General Options, Column Ordering, Messages, Buttons, Titles, Receipting, Transactions, Approvals, Proof of Delivery, Labels, **Returns** (highlighted in orange), Common Options, and Documentation. The main area is titled 'Returns' and contains a list of configuration options, each with a text input field. These options include: Return Items Button Label (Return Items), Hide Returns Button Label (Hide Returns), Return Selected Items Button Label (Return Selected Items), Return All Items Button Label (Return All Items), Hide Non Returnable Items Button Label (Hide Non Returnable Items), Show Non Returnable Items Button Label (Show Non Returnable Items), Returns Column Header (Returns), Returns Section Info Message (Return of additional/incorrect items, faulty products, warranty issues message), Select Product To Return Message (Please select at least one product to return), No Products To Return Message (There are no products to return), Errors In Some Of The Lines Message (There are errors in some of the lines), Return Quantity Exceeded Shipped Quantity Message (The return quantity cannot exceed the shipped quantity), and Return Quantity Exceeded Received Quantity Message (The return quantity cannot exceed the received quantity). Below these is an 'Order Not Completed Tooltip' section. At the bottom of the configuration area is a rich text editor with a menu (File, Edit, View, Insert, Format, Tools, Table, Help) and various formatting tools. At the very bottom of the widget are 'Cancel' and 'Save' buttons.

5. To save changes, click **Save**.

## Submit Return page

The Submit Return page is where the user enters information such as return reason, number of parcels, and other information.



Widgets used in this template include:

- [Return Information Widget](#)
- [Return Lines Widget](#)
- [Return Order Summary Widget](#)
- [Submit Return Buttons](#)

The screenshot shows the 'Return Information' widget. It has a blue header with the title 'Return Information'. Below the header is a form with two main sections. The first section is 'Reason Code' with a red asterisk, containing a text input field with the value 'Change of Mind'. The second section is 'Number of Parcels to pick up' with a red asterisk, containing a numeric input field with the value '0' and minus/plus buttons. Below these are four checkboxes: 'I understand the TnC's', 'Items are in a resalable condition', 'Items are ready for collection', and 'Items are securely packaged'. The widget has a light blue border and a shadow.

## Return Lines Static Info

This template is used to display the return lines information on both the Submit Return page and the Return Confirmation page. There are no return-specific widgets on this template.

| Return Items  |  |     |                |      |      |
|---|--|-----|----------------|------|------|
| Product   |  | Qty | Price (ex GST) | Unit |      |
|  Scotch Magic Tape, 12mmW x 33M<br>Code: CV273 |  | -1  | \$3.08         | ROLL | -\$0 |
|  Scotch Magic Tape, 19mmW X 33M<br>Code: CV275 |  | -1  | \$4.03         | ROLL | -\$0 |
| Subtotal (ex GST)   |  |     |                |      |      |
| + GST   |  |     |                |      |      |
| Total (inc GST)   |  |     |                |      |      |

## Return Confirmation Page

The Return Confirmation page is displayed to the user after they've submitted the return.

Widgets in use on this template include:

- [Return Confirmation Message Widget](#)
- [Return Confirmation Address Widget](#)
- [Return Confirmation Return Info Widget](#)
- [Return Confirmation Summary and Lines Static Widget](#)

## Return Confirmation

Print

Start New Return

✓

Your return is now in the process of being approved. The details of your return are displayed below.

i


Pickup is not necessary (keep the item) and credit will appear on your account in 14 days.

i

Return Information

Reason Code

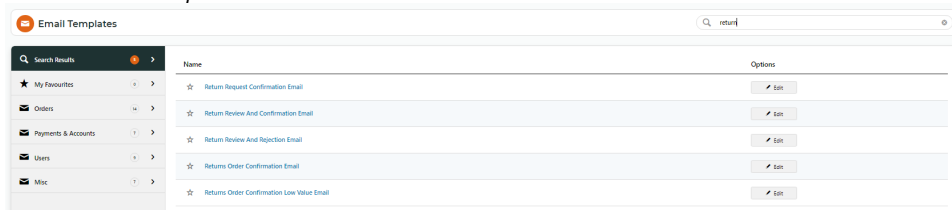
Customer Error

| Return Items  |  |     |                |      |      |
|---|--|-----|----------------|------|------|
| Product   |  | Qty | Price (ex GST) | Unit |      |
|  Scotch Magic Tape, 12mmW x 33M<br>Code: CV273 |  | -1  | \$3.08         | ROLL | -\$0 |

## 4. Edit Return Emails

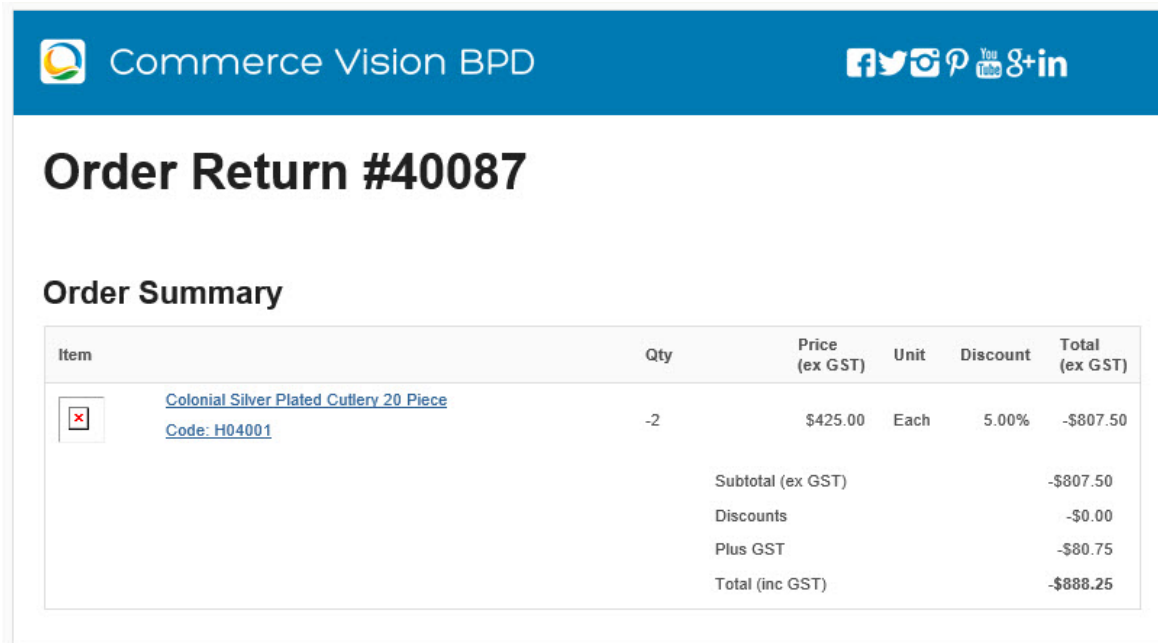
To customise return-related emails:

1. Go to **Content Content Emails**
2. Use the **Search** tool to find return-related emails. Enter 'return' in the Search box.
3. Select the email template to edit.



## Returns Order Confirmation Email

This email is sent to the user to confirm their return has been received and is being processed.



## Returns Order Confirmation Low Value Email



This email is sent to the user to confirm their return has been received and a credit for their low value item will be refunded.





## Low Value Order Return #40092

### Order Summary

| Item  | Qty | Price<br>(ex GST) | Unit | Discount | Total<br>(ex GST) |
|---|-----|-------------------|------|----------|-------------------|
|  <a href="#">Scotch Magic Tape, 12mmW x 33M</a><br><a href="#">Code: CV273</a> | -1  | \$3.25            | ROLL | 5.00%    | -\$3.09           |
|  <a href="#">Scotch Magic Tape, 19mmW X 33M</a><br><a href="#">Code: CV275</a> | -1  | \$4.25            | ROLL | 5.00%    | -\$4.04           |
| Subtotal (ex GST)   |     |                   |      |          | -\$7.13           |
| Discounts   |     |                   |      |          | -\$0.00           |
| Plus GST  |     |                   |      |          | -\$0.71           |
| Total (inc GST)   |     |                   |      |          | -\$7.84           |

### Mark a Product Non-Returnable

If Online Returns is enabled but there are products that cannot be returned, go to the product's Maintain Product page and untick **Is Returnable**.

☐ Is Dangerous Goods

☐ Is Free Freight

☐ Is Tailgate Required

#### Delivery And Pickup Option

Pickup Only

☒ Is Returnable

### Additional Information

|                              |   |
|------------------------------|---|
| Minimum Version Requirements | 4.05.05   |
| Prerequisites                | Pronto: Integrator version 4.69.02; proledb upgrade |
| Self Configurable            | No  |
| Business Function            | Orders  |

|                          |      |
|--------------------------|------|
| <b>BPD Only?</b>         | Yes  |
| <b>B2B/B2C/Both</b>      | Both |
| <b>Third Party Costs</b> | n/a  |

## Related Resources

- [Preferred Delivery Date](#)
- [Order Import](#)
- [Order Templates](#)
- [Make Outstanding Sales Orders & Transactions Visible Online](#)
- [How Order Integration Works](#)
- [Attach Payment Document to Order](#)
- [Backordered Products & Ordering](#)
- [Enforce Pack Quantities Globally](#)
- [Standing Orders Overview](#)
- [Standing Orders Settings](#)

## Related widgets

- [Return Confirmation Return Info Widget](#)
- [Return Information Widget](#)
- [Return Confirmation Address Widget](#)
- [Return Confirmation Message Widget](#)
- [Return Lines Widget](#)
- [Return Confirmation Summary and Lines Static Widget](#)
- [Track Order Widget](#)
- [Email Order Track Details Widget](#)