Web Link Help File:
Credits and Returns

Abstract

➢ This help file will demonstrate the procedure for submitting and handling product returns for credit. Using this application allows the entire return process to be managed exclusively via the website from start to finish.

Procedure

1) Sign into the site as website administrator user.
2) The first step is to add/edit the return reasons. To access this list click on the "Manage Return Reasons" module within the "Credits & Returns menu group. (fig. 1)
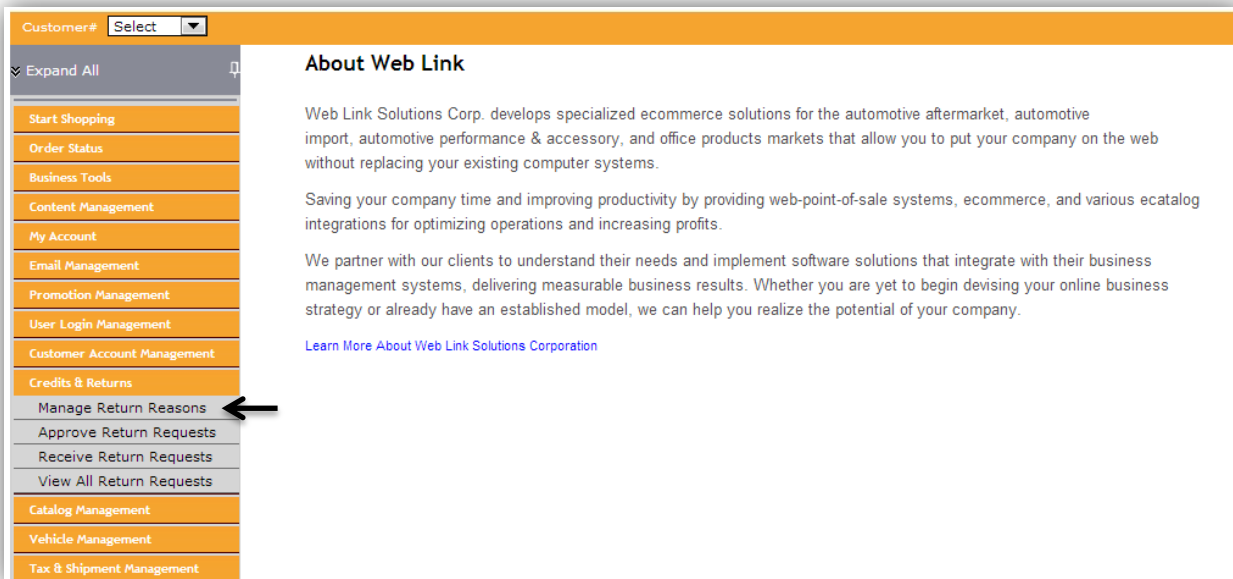

fig.1

3) There are 3 credit/returns reasons which are included in this list by default: Core Return, New Part Return and Defective. Additional reasons can be created by clicking on the "Add New Reason" button. All reasons can be modified by clicking on the "edit" icon. Whether editing an existing reason option or creating a new one, the options are the same: (fig.2)

- Reason: Create a title for the credit/return option
- Description: Provide a brief description for the credit/return option
- Maximum Return Time: Maximum amount of time (days) that the item can be returned for full or partial credit.
- Refund Amount: The percentage refund amount that will be offered for the returned item.
- For Internal Use Only: Checking this box will make the reason visible to internal site users only which will prevent customer users from having access to this reason option. This could be used as a goodwill credit type for special customers.
- Reason Details Required: Checking this box will require the customer to submit an explanation for why the item is being returned.
- Refund Price: The administrator can choose whether the return amount will be based on the core or sell price.

Click the "Save" button when finished.

fig.2

Manage Return Reasons

Reason	Maximum Return Time(Days)	Refund Amount (%)	For internal use	Details Required	Predefined reason	Edit	Delete
CORE RETURN	120	100	X	✔	✔	📝	
NEW PART RETURN	60	80	X	✔	✔	📝	
DEFECTIVE	365	100	X	✔	✔	📝	

Add New Reason

Reason* : NEW REASON
Description : Part Description
Maximum Return Time* : 30 Days
Refund Amount : 100 %
☐ For internal use only
☑ Reason Details required
Refund price : ☑ Sell Price ☐ Core Price

Save Cancel

4) A credit request is submitted by the customer by clicking on the Submit Return Request module within the Credits & Returns menu group. (fig. 3)

fig.3

Start Shopping
Order Status
Business Tools
My Account
Promotion Management
Credits & Returns
  Submit Return Request
  Track Your Return Requests
Vehicle Management
Customer Services

5) The customer can find the order containing the item(s) to be returned by entering a date range and/or order process number. Clicking on the "search" button presents the matching order(s). (fig. 4)

fig.4

6) Clicking on the "Request a Return" link for the appropriate order opens the order detail window. From here the part "Quantity to Return" for each part to be returned is entered. The "Reason" is selected from the available options in the drop down menu along with the "Reason Details" which may or may not be required depending on the settings chosen by the Website Administrator in step # 3 above. After the customer has clicked on the "Submit" button, the request is sent to the Administrator for approval. (fig. 5 and 6)

fig.5

fig.6

7) After the return has been submitted an email notification is sent to both the customer and the Website Administrator. (fig. 7 and 8) *These email templates can be edited as desired. Please refer to our Email Template support document which outlines the process of editing website generated emails.*
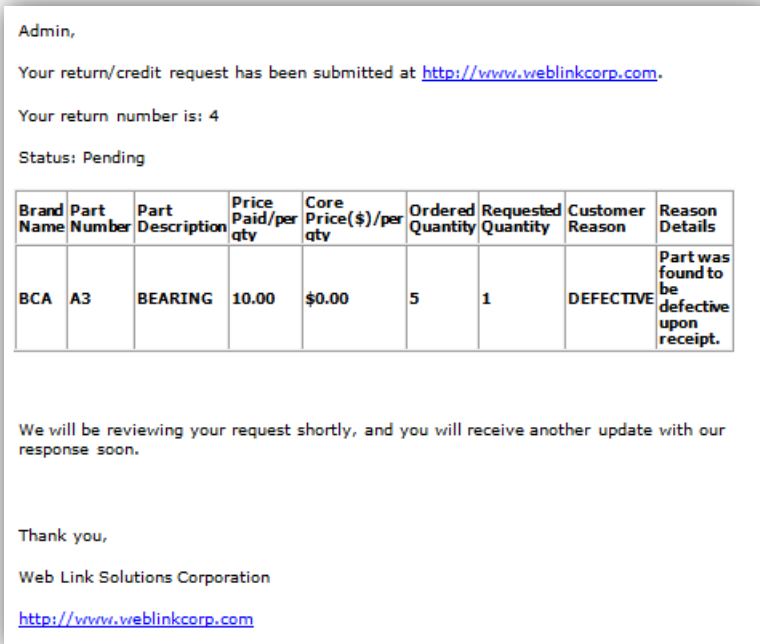
fig.7

Admin,

Your return/credit request has been submitted at http://www.weblinkcorp.com.

Your return number is: 4

Status: Pending

Brand Name	Part Number	Part Description	Price Paid/per qty	Core Price($)/per qty	Ordered Quantity	Requested Quantity	Customer Reason	Reason Details
BCA	A3	BEARING	10.00	$0.00	5	1	DEFECTIVE	Part was found to be defective upon receipt.

We will be reviewing your request shortly, and you will receive another update with our response soon.

Thank you,

Web Link Solutions Corporation

http://www.weblinkcorp.com

fig.8

From: B2B Demo [mailto:info@weblinkcorp.com]
Sent: Monday, July 1, 2013 8:45 AM
To: Websupport@weblinkcorp.com
Subject: A Return Request Has Been Submitted

A new Return Request has been submitted at http://www.weblinkcorp.com

Name: Sample Customer

Email: customertest@gmail.com

Return Number: 4

Status: Pending

Brand Name	Part Number	Part Description	Price Paid/per qty	Core Price($)/per qty	Ordered Quantity	Requested Quantity	Customer Reason	Reason Details
BCA	A3	BEARING	10.00	$0.00	5	1	DEFECTIVE	Part was found to be defective upon receipt.

8) To review and approve the return request the Administrator selects the "Approve Return Requests" menu option. After entering a date range and status type (pending is the default and is the status for all newly submitted return requests) clicking on the search button will display all relevant return requests. (fig. 9)

fig.9

9) Clicking on the "View Return Details" link will open the Review Details window. The Administrator must enter the Approve Quantity and Comments if desired. Clicking on the Approve button will mark the return as approved and another email notification will be sent to the customer alerting them of the updated status as well as instructing them to ship the item. (fig. 10, 11 and 12)

fig.10

fig.11

fig.12

Your return/credit request at http://www.weblinkcorp.com has been approved.

Return Number: 4

Status: Approved

Brand Name	Part Number	Part Description	Price Paid/per qty	Core Price($)/per qty	Ordered Quantity	Requested Quantity	Approved Quantity	Customer Reason	Approved Reason	Refund Amount($)	Comments	Reason Details	Total Amount
BCA	A3	BEARING	10.00	$0.00	5	1	1	DEFECTIVE	DEFECTIVE	10.00	Item is approved	Part was found to be defective upon receipt.	$10.00

Please ship the part/s back to us at the address below. Once we receive the part/s, we will process your credit.

Web Link Solutions Corporation

10028 NW 57th Place

Coral Springs, FL 33076

Thank You,

Web Link Solutions Corporation

http://www.weblinkcorp.com

10) Once the returned item(s) have been received, the final step is to complete the return. Selecting the "Receive Return Request" menu item will load a page allowing the Administrator to search for the appropriate return to finalize. Clicking on the "View Return Details" link will open the returned Return Details window. The quantity received must be entered along with comments if desired. The order can be finalized in a single step my selecting the Mark Return Request Completed checkbox. When doing so an additional comments box is displayed allowing the Administrator to enter Payment Details information if the credit for the return has already been applied. Clicking on the Submit button finalizes the return and an email notification is sent to the customer. (fig. 13, 14 and 15) Please note that if the Mark Return Request Completed checkbox is not enabled then the return will only be marked as "received" and will need to be finalized in a separate step by returning to this page. This is useful if the Administrator wishes to notify the customer that the shipped item has been received but has not yet applied the credit.

fig.13

Receive Return Request

Date: 6/8/2012   To: 6/13/2013   (MM/DD/YYYY)

Status: Approved   Search

Return Number	Web Process #	Requested Items	Requested Date	Approved Date	Received Date	Status	Refund Amount	
1	746	1	01/09/2013	01/09/2013	N/A	Approved	$10.00	View Return Details

Navigation menu:
- Expand All
- Start Shopping
- Order Status
- Business Tools
- Content Management
- My Account
- Email Management
- Promotion Management
- User Login Management
- Customer Account Management
- Credits & Returns
  - Manage Return Reasons
  - Approve Return Requests
  - Receive Return Requests
  - View All Return Requests
- Catalog Management

fig.14

Return Details

Field	Value
Return Number	1
Web Process #	746
# of Items Requested	1
# of Items Approved	1
# of Items Received	0
Requested Date	01/09/2013
Approved Date	01/09/2013
Received Date	N/A
Completed Date	N/A
Requested Quantity	1
Approved Quantity	1
Status	Approved

Brand Name	Part Number	Part Description	Price Paid($)/per qty	Core Price($)/per qty	Ordered Quantity	Requested Quantity	Approved Quantity	Customer Reason	Quantity Received	Approved Reason	Refund Amount($)	Comments	Reason Details
BCA	A3	BEARING	$10.00	$0.00	5	1	1	DEFECTIVE	1	DEFECTIVE	10.00	This is approved for Return	Part was found to be defective upon receipt.

Total Amount: $10.00

☑ Mark Return Request Completed

Payment Details — Credit applied to Visa card #xxxxxxxxxxxx9550

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fig.15

We have received your returned part/s regarding Return Number 4, and we have processed your credit. Please allow 3-5 business days for the credit amount to reflect in your bank account.

If you have any questions/concerns, please do not hesitate to contact us at websupport@weblinkcorp.com.

Return Status: Completed

Brand Name	Part Number	Part Description	Price Paid/per qty	Core Price($)/per qty	Ordered Quantity	Requested Quantity	Approved Quantity	Received Quantity	Customer Reason	Approved Reason	Refund Amount($)	Comments	Reason Details	Total Amount
BCA	A3	BEARING	10.00	$0.00	5	1	1	1	DEFECTIVE	DEFECTIVE	10.00	Item is approved	Part was found to be defective upon receipt.	$10.00

Thank you,

Web Link Solutions Corporation

http://www.weblinkcorp.com