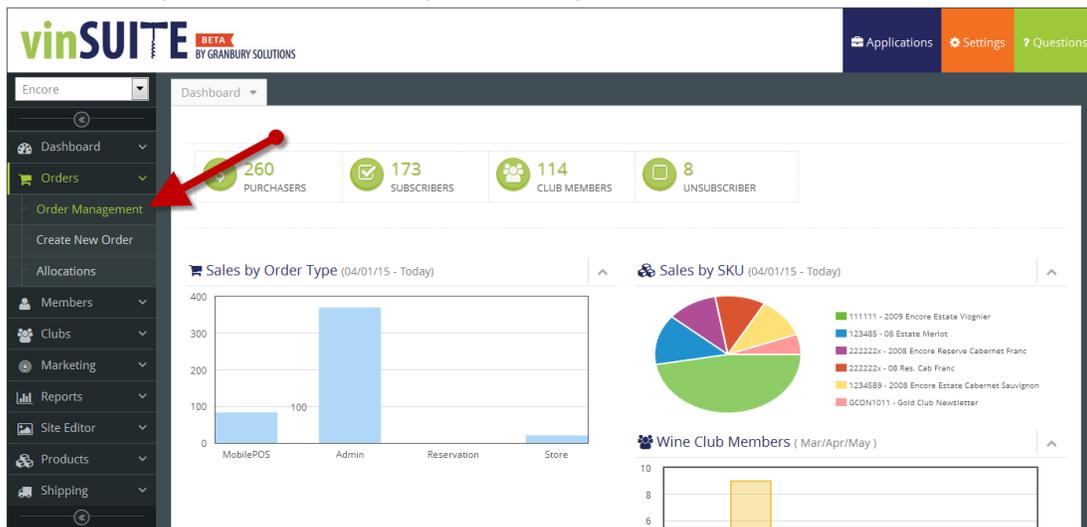# Returns, Refunds & Voids

When it comes to reversing credit card charges there are several options for how this is done in vinSuite. The method that you use is reliant on two things. First, whether or not the credit card charge has settled then if there are products to be returned back to inventory. The option to Void or Return/Refund will be managed in the order record depending on the status of the credit card charge. Below you will find definitions for a return, refund and a void. Note that only orders that were completed in vinSuite and the payment type is credit card.
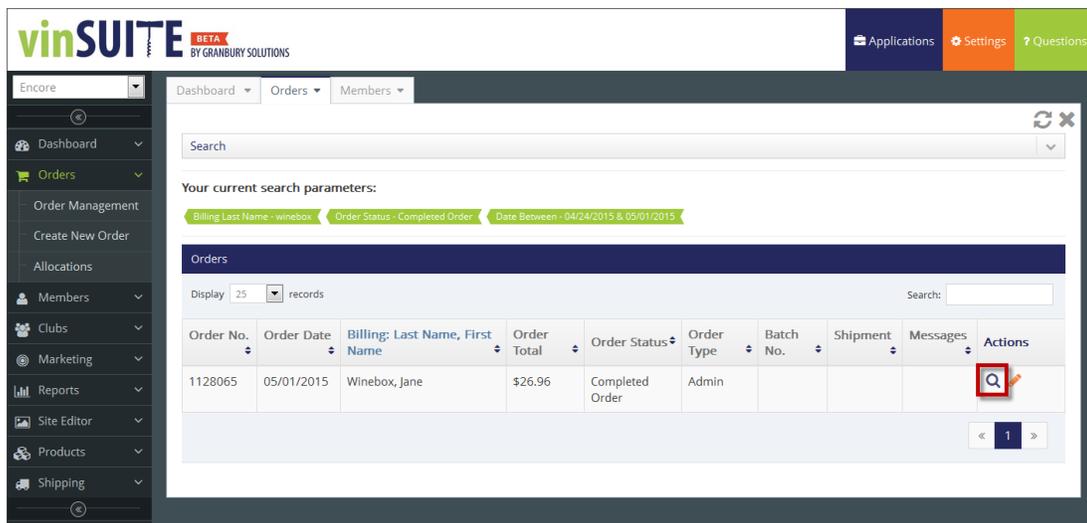
Voiding an Order in vinSuite

Orders can be voided up until the point where the credit card charge has settled through the payment gateway. Voids completely reverse all aspects of an order; credit card charges, wine inventory, committed the order to ShipCompliant. Voided orders will not show in reports unless specifically requested in the report setup.

1. Open the Order Record using either of these 2 methods:
   - **From the Orders section:** In vinSuite, expand the Orders section in the left hand menu then choose 'Order Management' from the list of options. The 'Orders' tab will open in the workspace, use the search fields provided to find and open the completed order.
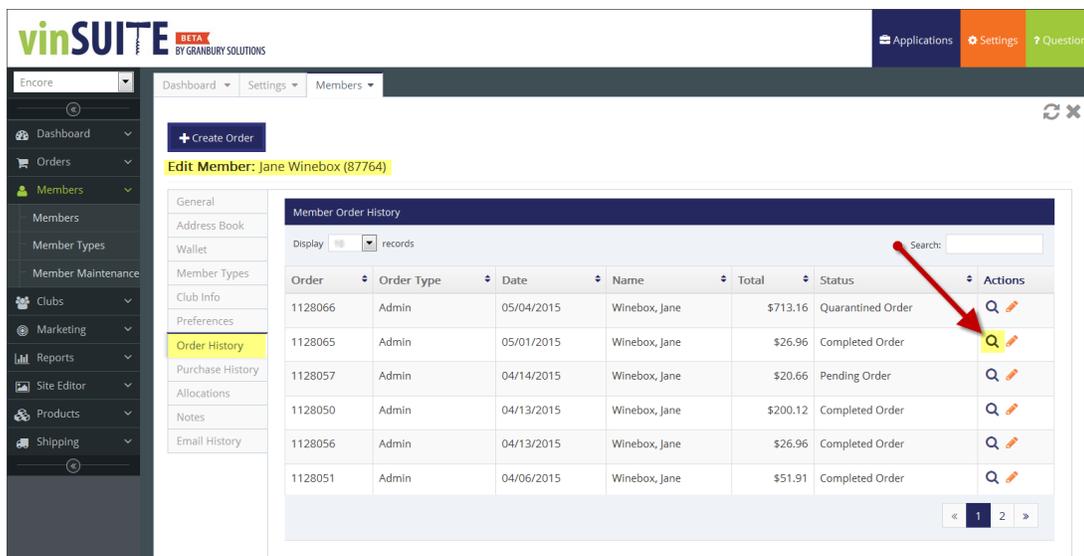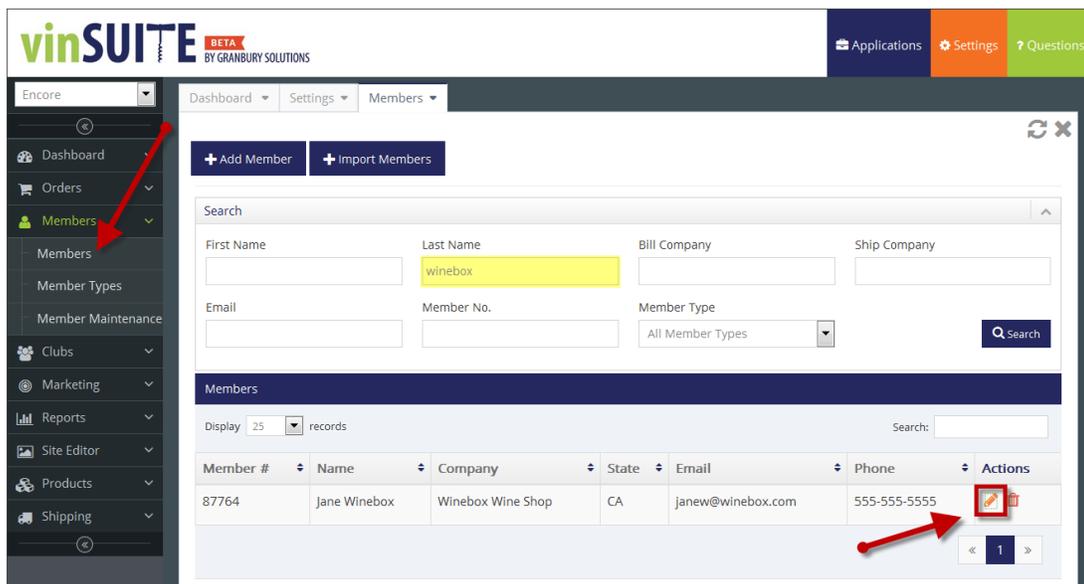
- **From the Member Record:** In VinSuite, expand the Members section in the left hand menu then choose 'Members' from the list of options. The 'Members' tab will open in the workspace, use the search fields provided to find and open the member record. Go to the 'Order History' tab on the left then choose the order in question from the list.

2. In the open Order Record, Click the "Void" button. You will be prompted to confirm the void; once that is confirmed the void order will go through.

This tab will only show if a void is available and the credit card charge has not been settled. In cases where a void is not available, this tab will read 'Create Refund'.

Create a Return

Returns can be made once the credit card charge has settled through the payment gateway. Returns will both reverse the charge on the credit card AND will return product to inventory. You will have the option to perform a full or partial return. Full returns will reverse the entire charge and return all products to inventory. Partial returns will reverse the charges for select line items on the order and return any products included in those line items to inventory.

1. Open the Order Record using either of these 2 methods:
   - **From the Orders section:** In vinSuite, expand the Orders section in the left hand menu then choose 'Order Management' from the list of options. The 'Orders' tab will open in the workspace, use the search fields provided to find and open the completed order.
   - **From the Member Record:** In VinSuite, expand the Members section in the left hand menu then choose 'Members' from the list of options. The 'Members' tab will open in the workspace, use the search fields provided to find and open the member record. Go to the 'Order History' tab on the left then choose the order in question from the list.
2. In the open Order Record, click the "Create Refund". *This will open the refund window in the old eWinery styles. The process of creating a refund is the same as eWinery from here forward.
3. Select Full Return form the 'Return or Refund Type' drop down.

4. Select the Return reason code from the 'Reason for Return' drop down.
   For instructions and information on how to create 'Return and Refund Reason codes' please visit Add/Edit Reason Codes

5. Once the Return Type and Reason have been selected the order detail will appear.

The following line items will appear with corresponding amounts for the order:

- Products
    - Product Name
    - Unit
    - Price
    - Current Quantity
      Will default to maximum quantity for that product in the order
    - Refund Quantity
      Will match 'Current Quantity'
    - Return to Inventory
      Will match 'Refund Quantity'
    - Current Amount
    - Amount to Refund
      Will be the same as Current Amount
    - Remaining Amount
      Will be $0.00 when processing a full return

- Shipping
    - Current Shipping
    - Amount to Refund
      Will be the same as current shipping
    - Remaining Shipping
      Will be $0.00 when processing a full return

- Current Handling
    - Current Handling
    - Amount to Refund *Will be the same as current handling*
    - Remaining Handling *Will be $0.00 when processing a full return*

- Bottle Deposit
    - Current Bottle Deposit
    - Amount to Refund *Will be the same as current bottle deposit*
    - Remaining Bottle Deposit *Will be $0.00 when processing a full return*

- Sales Tax
    - Current Tax
    - Amount to refund *Will be the same as Current tax*
    - Reaming Tax *Will be $0.00 for a full return*

- Total
    - Current Total *Full Order Total from completed order*
    - Amount to Refund *Will match Current Total and the amount of the complete order*
    - Remaining Total *Will be $0.00 for full return*

NOTE: *None of the fields on the above line items will be editable when processing a full return. The system will automatically enter the correct amounts to issue a full credit. Should you need to adjust the values you may want to issue a Partial Return or Partial Refund.*

6. Verify that all the order information is correct and that the 'Amount to Refund' is the correct amount. When you are satisfied with the full return amount click the 'Process Refund' button at the bottom of the screen.

Total			
	Current Total	Amount to Refund	Remaining Total
	$688.98	-$40.98	$648.00

Process Refund

7. When the full return has processed, the order will complete with the original order number followed by a R-1, 2, 3 (depending on the number of previous refunds against the order).

Summary | Edit Order | Edit Addresses | Compliance | Notes | Functions | Refund

 # 285555 : Refund Order

Refund History

Order#	Date	Refund By	Reason	Refund Amount
285555-R1	07/09/2014	Jacki Wood	Refund	$40.98
285555-R2	07/09/2014	Jacki Wood	Refund	$648.00

	Original Total:	$688.98
	Current Total:	$0.00

8. The [order number]-R1 will have a Refund Summary.

 # 285581-R1 : Refund Summary

Order Number:	285581
Refund Number:	285581-R1
Refund Date:	07/10/2014
Payment By:	Credit Card

Personal Information

Billing Information:
Jeff McNamara

1700 Soscol Ave.
Suite 3
Napa, CA, 94559
Phone: 7072537400
Email: jmcnamara@ewinerysolutions.com

Shipping Information:
Jeff McNamara
1700 Soscol Ave.
Suite 3
Napa, CA, 94559
Phone: 7072537400
Email: jmcnamara@ewinerysolutions.com

Order Detail:

Qty	SKU	Product	Price	Total Price
-6 Each	1234589	**2008 Encore Estate Cabernet Sauvignon**	-$100.00	-$600.00
		Subtotal:		-$600.00
		Shipping:		-$40.98
		Handling:		-$0.00
		Sales Tax:		-$48.00
		Total:		-$688.98

Reason for Refund:
Return

Close Window / Refresh List

This will provide the following information to be viewable at any time:

- Order Number - *original order number*
- Refund Number
- Refund Date
- Payment By - *payment type*
- Personal Information
    - Customer Billing Information
    - Customer Shipping Information

- Order Details - *items and amounts returned*
    - Qty - *quantity returned*
    - SKU
    - Product - *Product Name*
    - Price
    - Total Price
    - Subtotal
    - Shipping
    - Handling
    - Sales Tax
    - Total

- Reason for Refund - *reason code selected at the time the return was created.*

9. Returns and Refunds can be searched in the Order section by Order Number or by Order Type of "Refund".

Create a Refund

Refunds can be made once the credit card charge has settled through the payment gateway. Refunds reverse the charge on the credit card only, no items will be returned to inventory. Like returns, refunds can be performed as a full (entire order) or partial (specific line items only).

1. Open the Order Record using either of these 2 methods:
   - **From the Orders section:** In vinSuite, expand the Orders section in the left hand menu then choose 'Order Management' from the list of options. The 'Orders' tab will open in the workspace, use the search fields provided to find and open the completed order.
   - **From the Member Record:** In VinSuite, expand the Members section in the left hand menu then choose 'Members' from the list of options. The 'Members' tab will open in the workspace, use the search fields provided to find and open the member record. Go to the 'Order History' tab on the left then choose the order in question from the list.

2. In the open Order Record, click the "Create Refund". *This will open the refund window in the old eWinery styles. The process of creating a refund is the same as eWinery from here forward.

3. Select Full Refund from the 'Return or Refund Type' drop down.

4. Select the Refund reason code from the 'Reason for Refund' drop down.

For instructions and information on how to create 'Return and Refund Reason codes' please visit Add/Edit Reason Codes.

5. Once the Refund Type and Reason have been selected the order detail will appear.

Return or Refund Type

Full Refund ▼

To change your Return or Refund Type, please **restart this process.**

Reason for Refund

Broken : Wine broken in transit ▼ [Add/edit reason codes] ⟳

Broken : Wine broken in transit

Products

Product Name	Unit	Price *	Current QTY	Remaining QTY	Refund QTY	Return to Inventory	Current Amount	Amount to Refund	Remaining Amount
2008 Encore Estate Cabernet Sauvignon	Each	$100.000	6	0	6 ▼	0 ▼	$600.00	☐ Override: -$ 600.00	$0.00

* Price shown here may be an approximation based on case price / 12

Shipping

	Current Shipping	Amount to Refund	Remaining Shipping
	$40.98	☐ Override: -$ 40.98	$0.00

The following line items will appear with corresponding amounts for the order;

a. Product(s)
   i. Product Name
   ii. Unit
   iii. Price
   iv. Current Quantity
   v. Refund Quantity - *will default and remain at zero (0) as no items will return to inventory on a refund*
   vi. Return to Inventory
   vii. Current Amount
   viii. Amount to Refund - *this will default to the amount on the 'Current Amount'*
   ix. Remaining Amount - *will be $0.00 when processing a full refund*

b. Current Shipping
   i. Amount to Refund - *will default to current shipping amount*
   ii. Remaining Shipping - *will be $0.00 when processing a full refund*

c. Handling
   i. Current Handling
   ii. Amount to Refund - *will default to current handling*

iii. Remaining Handling - *will be $0.00 when processing a full refund*

d. Bottle Deposit
   i. Current Bottle Deposit
   ii. Amount to Refund - *will default to current bottle deposit*
   iii. Remaining Bottle Deposit - *will be $0.00 when processing a full refund*

e. Sales Tax
   i. Current Tax
   ii. Amount to refund - *will default to Current tax*
   iii. Reaming Tax - *will be $0.00 for a full refund*

f. Total
   i. Current Total - *Full Order Total from completed order*
   ii. Amount to Refund - *will match Current Total and the amount of the complete order*
   iii. Remaining Total - *will be $0.00 for full refund*

6. Along with all fields not being editable the 'Return to Inventory' will remain at zero (0) as no items are returned to inventory when issuing a refund.

Products									
Product Name	Unit	Price *	Current QTY	Remaining QTY	Refund QTY	Return to Inventory	Current Amount	Amount to Refund	Remaining Amount
2008 Encore Estate Cabernet Sauvignon	Each	$200.000	3	0	3 ▾	0 ▾	$600.00	☐ Override: -$ 600.00	$0.00

* Price shown here may be an approximation based on case price / 12

7. Verify that all the order information is correct and that the 'Amount to Refund' is the correct amount. When you are satisfied with the full refund amount click the 'Process Refund' button at the bottom of the screen.

Total	Current Total	Amount to Refund	Remaining Total
	$688.98	-$40.98	$648.00

Process Refund

8. When the full refund has processed, the order will complete with the original order number followed by a R-1, 2, 3 (depending on the number of previous refunds against the order).

| Summary | Edit Order | Edit Addresses | Compliance | Notes | Functions | Refund |

285555 : Refund Order

Refund History

Order#	Date	Refund By	Reason	Refund Amount
285555-R1	07/09/2014	Jacki Wood	Refund	$40.98
285555-R2	07/09/2014	Jacki Wood	Refund	$648.00

Original Total: $688.98

Current Total: $0.00

9. The [order number]-R1 will have a Refund Summary.

This will provide the following information to be viewable at any time:
   a. Order Number - *original order number*

   b. Refund Number

   c. Refund Date

   d. Payment By - *payment type*

   e. Personal Information
      i. Customer Billing Information
      ii. Customer Shipping Information

   f. Order Details - *items and amounts returned*
      i. Qty - *quantity returned*
      ii. SKU
      iii. Product - *Product Name*
      iv. Price
      v. Total Price
      vi. Subtotal
      vii. Shipping
      viii. Handling
      ix. Sales Tax
      x. Total

   g. Reason for Refund - *reason code selected at the time the return was created.*

10. Returns and Refunds can be searched in the Order section by Order Number or by Order Type of "Refund". See Searching Orders for additional information.