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Shopware Plug-In Premium credit notes

Version 2.0.1

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2 Overview

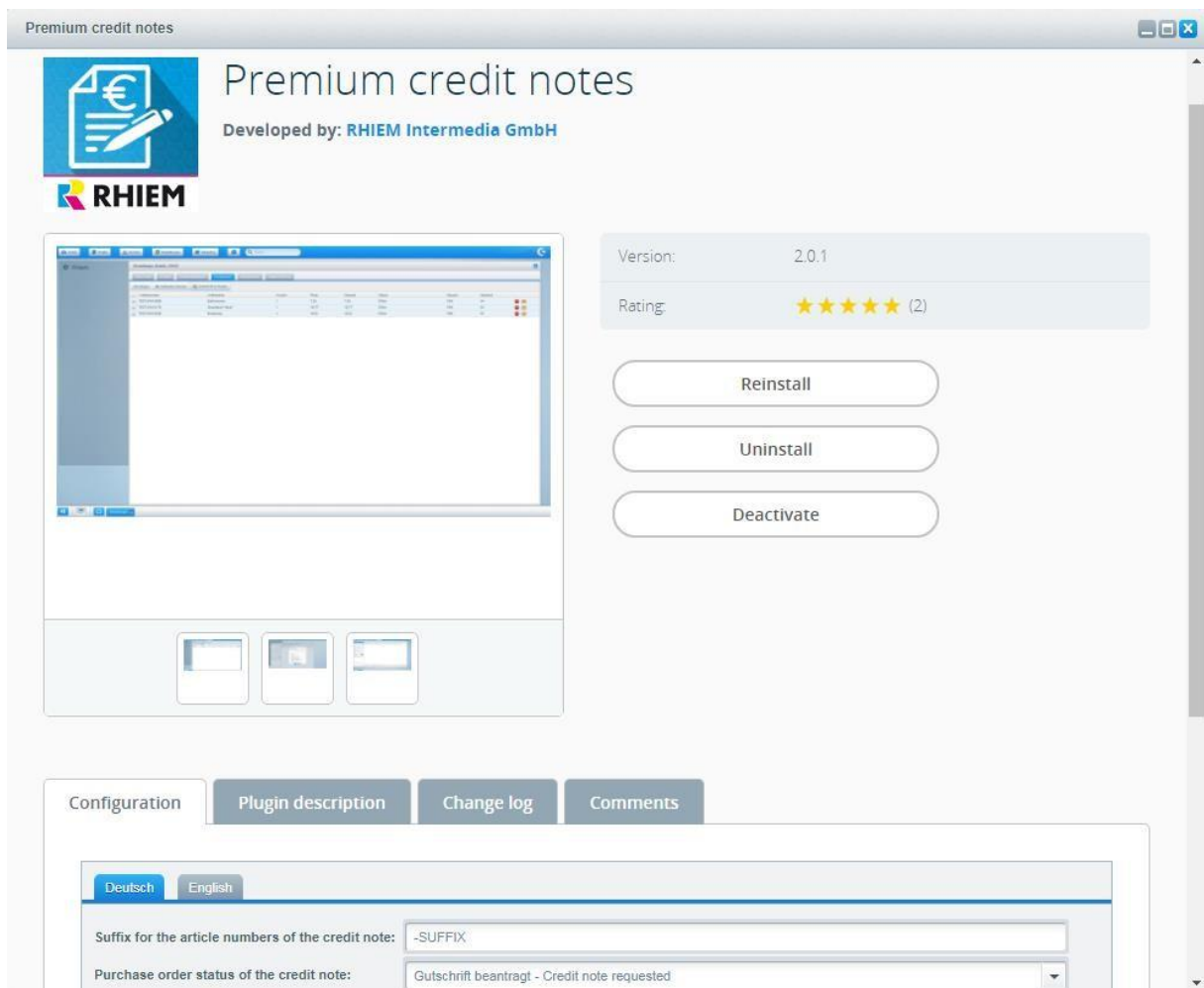
This plug-in facilitates the generation of credit notes. A new purchase order with a negative amount is entered for each credit item and therefore the refunds are also taken into account in the sales analysis statistics at the correct date.

Unlike the Shopware standard, this plug-in allows the generation of partial credits. The items to be added to the credit balance can simply be selected in the Details view and then an order for a voucher for these items will be generated at the push of a button. The shipping costs can also be credited to the account as a separate item if required.

3 Installation

Install the plug-in using the plug-in manager (details on the plug-in manager can be found in the Shopware wiki under http://wiki.shopware.com/Plugin-Lizenz-Manager_detail_1337.html).

After successful installation of the plug-in, the configuration window will open.



Premium credit notes

Developed by: **RHIEM Intermedia GmbH**

Version: 2.0.1

Rating: ★★★★★ (2)

Reinstall

Uninstall

Deactivate

Configuration | Plugin description | Change log | Comments

Deutsch | English

Suffix for the article numbers of the credit note: -SUFFIX

Purchase order status of the credit note: Gutschrift beantragt - Credit note requested

4 Configuration of the plug-in

Suffix for the article numbers of the credit note:	-SUFFIX
Purchase order status of the credit note:	Gutschrift beantragt - Credit note requested
Status update of the original purchase order:	Gutschrift erstellt - Credit note created
Status update of the original items:	Gutschrift - Credit note
Name of the voucher item:	Voucher
Voucher article number:	V-Back
Hide credit notes in front-end:	No
Use decimal numbers for quantity and stock level:	No

The following settings can be selected during the plug-in configuration process:

Setting	Content	Example
Suffix for the article numbers of the credit note	A suffix can be attached to each item in the credit memo to make it easier to identify credit items.	-SUFFIX
Purchase order status of the credit note	The credit memo order is entered with this purchase order status.	Credit note requested
Status update of the original purchase order	Change in the order status of the original purchase order after the credit memo has been generated.	Credit note created
Status update of the original item	Change in the item status of the original purchase order after the credit memo has been generated.	Credit note
Name of the voucher item	Only relevant if a voucher was used in the original purchase order.	Voucher
Voucher article number	Only relevant if a voucher was used in the original purchase order.	V-Back
Hide credit notes in front-end	The credit notes are displayed as a separate purchase order in the customer account. You can deactivate this here.	No
Use decimal numbers for quantity and stock level	The quantity and stock level can remain as decimal numbers when a credit note is entered. NB: not Shopware standard	No

5 Using the plug-in

51 Generating credit notes

First open the Details view for the purchase order for which a credit note is to be issued and open the items tab (“Positions”).

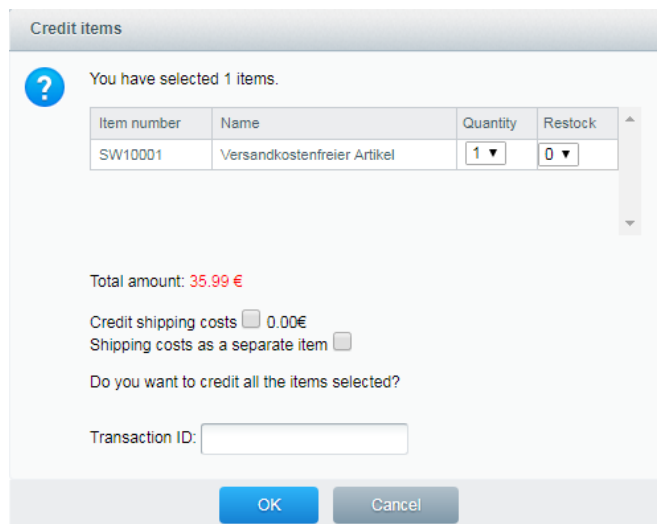
Select all the purchase order items which are to be added to the credit balance using the checkboxes on the left. To credit only the shipping costs, do not select any items here.

Then click on “Generate credit note” in the top bar to generate the credit note.



Item number	Item name	Quantity	Price	Total	Status	VAT	Stock
<input checked="" type="checkbox"/> SW10001	Versandkostenfreier Arti...	1	35.99	35.99	Open	19%	-1
<input type="checkbox"/> SW10002841	Aufschlag bei Zahlungs...	1	35.99	35.99	Open	19%	-1

The number of articles for each credit item can be changed in the next box. The stock of the corresponding article can be replenished by selecting the relevant number in the “Restock” column.



Credit items

You have selected 1 items.

Item number	Name	Quantity	Restock
SW10001	Versandkostenfreier Artikel	1	0

Total amount: 35.99 €

Credit shipping costs 0.00€

Shipping costs as a separate item

Do you want to credit all the items selected?

Transaction ID:

OK Cancel

You also have the option of adding the shipping costs to the credit memo by checking the corresponding checkbox or directly assigning a transaction for the credit memo order.

You can also use the checkbox to specify whether the shipping costs should be entered as a separate item in the credit note.

IMPORTANT: If the shipping costs have already been entered as an item and have been selected, this option should not be selected otherwise the shipping costs will be credited twice.

Press OK to confirm and then a credit memo order will be generated.

52 Credit for vouchers

If the purchase order you want to credit contained a voucher then you do not need to select the voucher as an item for the voucher to be included in the credit.

You will automatically receive a voucher configuration.

If you select percentage ("Percentage") and enter a voucher value between 0 and 100 (percent), the credit amount will be reduced by the percentage entered.

If you select absolute ("Absolute amount") the voucher value will be subtracted from the total credit amount.

You can store the name of the voucher item and the voucher article number in the general plug-in configuration.

By checking the corresponding checkbox, the voucher can also be applied to the shipping costs (only if percentage ("Percentage") is selected).

Credit items

? You have selected 1 items.

Item number	Name	Quantity	Restock
SW10170	Sonnenbrille "Red"	4 ▼	0 ▼

Voucher: Percentage ▼

Voucher value:

Apply voucher to shipping costs:

Total amount: 134.28 € Excl. VAT (minus voucher amount)

Credit shipping costs 3.28€

Shipping costs as a separate item

Do you want to credit all the items selected?

Transaction ID:

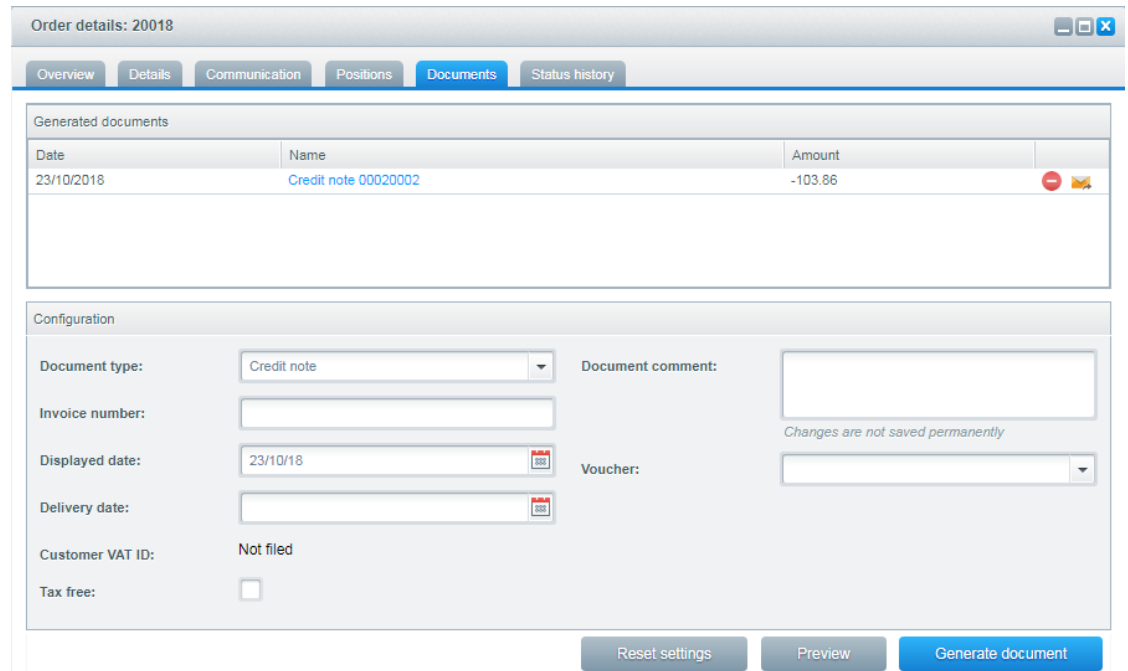
OK
Cancel

If you do not want to credit the voucher to the credit note, then enter 0 for the voucher value and remove the item after you have issued the credit note.

53 Generating PDF credit notes

The new credit memo order will have the purchase order status selected from the plug-in configuration (e.g. credit note requested).



The credit note can now be generated as a PDF document under the documents tab ("Dokumente") in the Details view of the credit memo order.



Order details: 20018

Overview Details Communication Positions Documents Status history

Generated documents

Date	Name	Amount	
23/10/2018	Credit note 00020002	-103.86	 

Configuration

Document type: Credit note

Document comment:

Invoice number:

Displayed date: 23/10/18

Delivery date:

Customer VAT ID: Not filed









Tax free:

Voucher:

Changes are not saved permanently

Reset settings Preview Generate document

After generating the document, you should change the order status, e.g. to credit memo issued ("Credit note created"). In this way, you can always keep track of the status of your individual credit notes.

<input type="checkbox"/>	23/10/2...	20020	-39.95	Prepay...	Standar...	Deutsch	Mustermann, Max (Muster GmbH)	test@example.com	Credit note created	Completely paid	   
<input type="checkbox"/>	14/08/2...	20006	39.95	Prepay...	Standar...	Deutsch	Mustermann, Max (Muster GmbH)	test@example.com	Completely delivered	Completely paid	   

If you would like automated generation of the documents including email dispatch then use our automatic document issue plug-in ("Automatische Dokumenterstellung").

TIP: On the order summary page, the reference purchase order can be accessed by clicking on the blue double-headed arrow.

6 Generating PDF documents

Some changes have been made to the PDF template for credit notes (“Vouchers”) in order to facilitate allocation.

- Issue of the original purchase order number
- Display of positive amounts

Simply use the attached index_gs.tpl and copy it into your document template folder. You can find the attached file under Community/Backend/RhiemRefund/Template/index_gs.tpl.

7 Email templates

The order number of the original purchase order can be accessed through `{sOrder.attributes.rhiem_reference_ordernumber}` in the status email templates.

8 Support

Do you have any questions or would you like to customize this plug-in to your individual requirements?

Please use the [Shopware plug-in support function](#).

Do you need help meeting your Shopware requirements? Please use our contact form at <http://rhiem.com/de/kontakt/>

Send us an email at: shopware@rhiem.com

Or call us on: **+49 (0) 28 55 - 97 00 55**

We look forward to hearing from you!

9 License Agreement

Please note our license agreement: <https://rhiem.com/license-agreement.pdf>
By using our plugin you confirm that you have read the license agreement and agree with it.