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| CASE STUDY | |
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| Prepared date : 5/11/2013 | Revised Date : |

**CASE1:- Payment Not Done-Cancel the Order**

Task : 1) Mark the Order cancelled

2) Capture date of cancellation, refund amount, Person and reason.

Event: SAVE

Action: Save data to the database

Send an Email to the customer and Admin.

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| **#** | **email** | **Message** |
| 2 | Customer message | Order:# has been cancelled on <Date> and No payment was received, for refund |
| 3 | Admin Message | Order:# has been cancelled on <Date> and No payment was received, for refund |
| 4 | TDM Message | -If assigned- |
| 5 | Sales Message | -If assigned- |

**CASE1.1:- Payment done (partially/full)-cancel the order**

Task : **Check the order**

1. Provide how much amount to refund wrt to company rules
2. Get the details of the payment refund method (Credit card, PayPal, cheque etc)
3. Record the date, Amount to refund, person and comments for cancellation
4. Mark order as cancelled, update production details not to continue to production
5. No more payments to be accepted for this Invoice
6. Receipts generated
7. Generate the Credit Note to Customer with the amount to refund.

Event: SAVE

Action : Save data to the database

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| **#** | **email** | **Message** |
| 2 | Customer message | Order:# has been cancelled and the amount 500$ will be refunded |
| 3 | Admin Message | Order:# has been cancelled and the amount 500$ will be refunded |
| 4 | TDM Message | -If assigned- |
| 5 | Sales Message | -If assigned- |

**CASE1.2:- Generate Credit Note**

Task : 1)Add refund amount to customer A/C

2) Issue a credit Note

3) Update order status

4) Stop production

Event: SAVE

Action: Save data to the database

Send an Email to the customer and Admin

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| **#** | **email** | **Message** |
| 2 | Customer message | Credit Note for the Order:# has been generated |
| 3 | Admin Message | Credit Note for the Order:# has been generated |
| 4 | TDM Message | -If assigned- |
| 5 | Sales Message | -If assigned- |

**CASE1.2:- Refund from Credit Note**

Task: 1) Issue amount

2) Generate receipt

3) Close Order

4) Close Invoice

5) No future transactions

Event: SAVE

Action:

|  |  |  |
| --- | --- | --- |
| **#** | **email** | **Message** |
| 2 | Customer message | As per Credit Note 500$ have been refunded to you account |
| 3 | Admin Message | As per the credit Note for the order:# 500$ have been refunded. |
| 4 | TDM Message | -If assigned- |
| 5 | Sales Message | -If assigned- |

**CASE1.3:- Generate Debit Note from Credit Note**

Task: 1) Generate Receipt

2) Record Details

3) Process Order

4) Adjust invoice

Event: SAVE

Action:

|  |  |  |
| --- | --- | --- |
| **#** | **email** | **Message** |
| 2 | Customer message |  |
| 3 | Admin Message |  |
| 4 | TDM Message | -If assigned- |
| 5 | Sales Message | -If assigned- |