Handling Customer Returns with Replacement Items

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This guide explains how to process customer returns with replacement shipments. It is intended for general users.

For systems <u>configured to replace returned products</u> (https://aace6.knowledgeowl.com/help/understandingprocesses-for-customer-returns) and to automatically generate shipments, creating and receiving a return shipment record will generate an outgoing shipment for the replacement items.

- 1. Navigate from Main Menu > Order Management > Orders.
- 2. Use the <u>Quick Search (http://aace6.knowledgeowl.com/help/using-the-quick-search-bar)</u> bar to locate the original order.

Note: If the order is closed, you must use the Actions options to re-open it.

3. Click Management tab > Shipping & Receiving tab > Order Item Actions (承) > Generate Incoming Return Shipment.

| • | | | | | | Ord | iers | | | | | | |
|------------------------|---------------|-------------------|------------|---------|----------------|-----------|---------------|---------------|----------|------------|-----------------------|----------------|------------|
| Record: 10 of : | 12 | | | | | | | | | New 🕂 🛛 B | iit 🖋 🛛 Delete 🗄 | 🗙 Print 🖶 | Actions 🛪 |
| Order: 6 | 0282 | Brightsi | ide Cha | rter | School | | | | | 07/0 | 5/22 | 0 | PEN 🛑 |
| Sales Order | Man | agement | ob Costs & | Approva | als | | | | | 1 Notice 🔒 | Tasks 🔽 | Emails 🔛 | Docs |
| | | | | 6 | | | | | | | | | |
| Overview Order Item | Invoicing | Procuremen | t Fulfillm | | Shipping & R | eceiving | Tasks & Pro | Shipped | Remain % | Ship Date | | No packing p | seanuts. 🛪 |
| > NTBK-011 L | Lab Notebooks | / Journals | | BO No | | 20 | Keedy to ship | 20 | 0 | 07/07/22 | Actions Generate (| Outgoing Shipr | mant |
| | | , | | | | | | | | | | Incoming Retu | |
| | | | | | | | | | | | | | |
| hipments | | | | | | | | | | Total Cost | | 0.00 😧 | |
| _ | Delivery Date | Title | | Type | PO | Carrier 5 | Service | Carrier Track | ing # | Cost Track | ing Status | | Status |
| | | Brightside Charte | er School | OUT | > | | | | | 0.00 | | * | 0 ^ |
| | | | | | | | | | | | | | |
| Pept AI | Asgn | By EH As | ign To MH | Trackin | g Status Quote | | | | | | | | K |

- 4. At the Shipping Log module, review the incoming return shipment record:
 - Remove any irrelevant items from the Packing List by clicking the **Delete** icon (*****) for those lines.

| Record: 1 of 1 | | | | | | | | New 🖶 Edit 👌 | Pelete X | Print 🗟 Actions | |
|---|------|---------------------------------|----------------------|---------------------------|----------|---------|------------------------|-----------------|----------|----------------------|--|
| Shipment: 60186 | | Retur | n; Brights | 07/08/22 | 2 🛛 | PENDING | | | | | |
| Incoming Return Shipm | nent | | | | | | | Notices 😣 | Tasks 🗹 | Emails 🎽 🛛 Doc | |
| Ship From | | No packing peanuts. 📌 | Shipment Info | | | | Purchased | Description | | | |
| Company > | Ô 9 | Shipment Type | Carrier | Carrier Service Account # | | | | Test | | | |
| Brightside Charter School | | Incoming Return | FedEx | FedEx FedEx Ground 1654 | | | | | | | |
| Luisa Ramos 8767 Cherry Blossom Road | | Ship Terms Ship Point | Carrier Tracking # | | | | Delivery Date 07/08/22 | | | | |
| Sacramento, CA 94203 | | | 1654456895332 | | | | | | | | |
| | | Declared Value | Weight | L | W | н | Shipping Cost | Package Type | Package | ge IDs | |
| | | 0.00 | 5 | 16 | 12 | 8 | 0.00 | FedEx Box | 465512 | 2 | |
| Packing List | | ription | Order | | Purchas | e Order | | | Bin Q | Ref #(s) 🕷 | |
| | Lab | ription Notebooks / Journals | 0rder ⊇ ★ > 60282 | | Purchas | e Order | Exp Qty » | Quantity Weight | | Ref #(s) 3% #5 36 | |
| Code | | | | | Purchase | e Order | | | | | |
| Code | Lab | | | | Purchas | e Order | | | | | |
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| Code | Lab | | | | Purchase | e Order | | | | | |

• Change the **Quantity** field to show the number of items being returned.

- 5. Click Save.
- At the Shipment Received confirmation dialog, click Not Yet.
 This keeps the record in Pending status until the returned product arrives at your warehouse.

When the returned product arrives, your warehouse staff will locate the return shipment record and mark it as received. This will prompt aACE to generate a replacement shipment for the order.

Manually Prevent an Outgoing Replacement Shipment

If you do not wish to replace the returned product, you can prevent the outgoing replacement shipment for an individual order. *Before* you create the return shipment record, you must manually update the original order record. Reduce the item quantity on that record to the number of units your customer is *keeping*.

For example, suppose you originally shipped 25 units. However the customer will be returning five units and doesn't want them replaced. They would still be in receipt of 20 units. So you would reduce the *original* order's item quantity from 25 to 20 using these steps:

1. Navigate to the correct module and use the <u>Quick Search (https://aace5.knowledgeowl.com/help/using-</u> <u>the-quick-search-bar)</u> bar to locate the *original* order.

- 2. At the detail view, re-open the order (as described above), then click Edit.
- 3. Adjust the order item quantity to reflect the number of units the customer is *keeping*. aACE displays a warning dialog asking if you want to change the new quantity back to the quantity already shipped.
- 4. Click **No** to keep the reduced quantity.

| Order: 60296 | Queens | County School Distr | ict | 07/08/22 | OPEN |
|---|------------------------------------|--|------------------------------------|--|---|
| Sales Order Manage | ment Job Costs & A | pprovals | | 2 Notices 😣 🛛 Tasks 🖸 | Emails 🎽 🛛 Docs 🄞 |
| Sill To Follow up with | Olivia 2-3 days after sending an 🖈 | Ship To End Customer | Package brushes in 2 packs of 25 📌 | Activities & Comm | nents |
| Customer (Bill To) > | Customer PO # | Ship To Company > | Ship Type Ship Date | | |
| Queens County School District | | Queens County School District | Complete 07/12/22 | | |
| Divia Jackson 7392 Windfall Rd. Astoria, NY 11105 | Rate Card > Disc % | Olivia Jackson 7392 Windfall Rd. Astoria, NY 11105 | Inventory Bin | | |
| | Billing Terms | | Shipping Terms | | |
| | Net 30 | | | | |
| escription | | Additional Info | | | |
| | к ^и | | *** | | |
| and any Thomas | | | | | |
| Code | Description | Invtry Alts Upgs Opts Quantil | ty BO DS SO Unit Cost Su | ubcosts Unit Price | Total Margin 🛪 |
| Order Items Code 1 > SE-B-WB2 | White bristle bamboo | Invtry Alts Upgs Opts Quantil 30 0 0 + E | | ubcosts Unit Price 0.00 5.00 | Total Margin オ 135.00 60% オ ^ |
| Code | White bristle bamboo | 30 0 0 + = 2 | 2 2.00 | | |
| Code SE-B-WB2 | White bristle bamboo | 30 0 0 + = 2 Message | 2 2.00 | | |
| Code Sales Billing Fulfillm | White bristle bamboo | 30 0 0 + = 2 Message | 2 2.00 | 0.00 5.00 Subtotal Adjustment | 135.00 60% x ↑ 250.00 ≤ 60% 0.00 |

- 5. Click Save.
- 6. Create the return shipment (as described above).

As an additional example, if the customer were to return all 25 units, you would reduce the item quantity on the original order to zero.