

# Customer Returns

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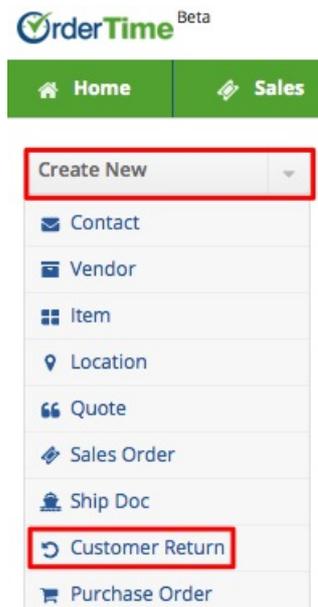
## Overview

Whether due to error, or a change of heart, your customers will occasionally return items. Customer Returns are transactions that show what Items are shipped by Customers back to you.

You will notice the Customer Return form is nearly identical to that of the **Ship Doc**. The only difference is the direction of the shipment: with Ship Docs, Items are shipping *from* you *to* the Customer; a Customer Return merely reverses the process.

Customer Returns can be easily processed by selecting the Create New drop down menu and selecting the Customer Return option.

1. Click on the side menu.
2. Select **Create New**.
3. Select **Customer Return** from the drop down menu.



4. Enter the customer name on the *Create a new Customer Return for* box. A drop-down menu will provide you with a list of customers that are already in your database. Select the appropriate customer.
5. Click on **Next>>** to proceed to the next screen.

The image shows a screenshot of the 'Create a new Customer Return for' form. The breadcrumb trail at the top reads 'Sales > Customer Returns > Customer Return'. Below this is a heading 'Create a new Customer Return for:' followed by a dropdown menu. The dropdown menu is open, showing a list of customer names. The 'Next >>' button is highlighted with a red box, along with the dropdown menu.

6. Review the customer information, specifically the shipping address. If they are different, make changes as needed to insure that the Return has the correct billing address and will be

returned to the correct shipping address.

7. Select the Date if it is different from the day of origination. (Date is auto-filled)
8. Enter Customer's Purchase Order (PO) Number and Tracking Number, if applicable.
9. Provide more details by completing the other tabs: Default, Memo & Instructions and Custom.
10. Click **Save**.

The screenshot shows the 'Customer Return - 2' form. At the top right, there are 'Save' and 'Cancel' buttons. Below the header, there are fields for 'No.' (2), 'Date' (03/09/2018), 'Customer PO', and 'Tracking No.'. The form has tabs for 'Address', 'Defaults', 'Memo & Internal Notes', and 'Custom'. Under the 'Address' tab, there are two sections: 'Billing Address' and 'Shipping Address'. Both sections have identical fields: Name/Company (Comp1), Street (123), Floor/Suite (4), Care of, City (Miami), State/Prov./Reg. (FL), Zip/Postal code (45778), Country (US), Contact (Jack Frost), Alt. Contact, Phone ((301) 898-6765), Alt. Phone, Fax ((301) 898-6760), Website, and Email (abccom@email.com). There are checkboxes for 'Copy changes to customer' in both sections.

You can also do the following in the Customer Return page:

- Use the Edit button next to the Create PDF drop down menu to make changes.
- Process refund, send emails, add attachments, create a log, and add notes to your Vendor Return.
- Under the Memo & Instruction tab, you can include notes and Date Stamp as needed.
- Create a PDF file of the Customer Return.
- Update the status of the Customer Return.

The screenshot shows the 'Customer Return - 2' summary page. At the top right, there are 'Create PDF' and 'EDIT' buttons. Below the header, there are 'Status' and 'Pending Return' buttons. The page is divided into four main sections: 'General', 'Bill Address', 'Ship Address', and 'Summary'. The 'General' section contains fields for No. 2, Customer ABCCom, Date 3/9/2018, Customer PO, and Contact. The 'Bill Address' section contains fields for COMP1, 123, 4, MIAMI, FL 45778, and US. The 'Ship Address' section contains fields for COMP1, 123, 4, MIAMI, FL 45778, and US. The 'Summary' section contains a table with the following data:

Summary Revision : 1	
Subtotal	0.00
Ship 01	20.00Tax
Discount \$	0.00Tax
TaxRec1 (0.500 %)	0.10
Total Amount	20.10
Refunds/Credits	0.00
Balance	20.10

Below the summary section, there are tabs for 'Items', 'Details', 'Memo & Instructions', 'Attachments', 'Custom', 'Refund', 'Open Activities', and 'Activity History'. The 'Items' tab is selected, and there is a search bar with 'Name/Number' and 'Search Items' fields. Below the search bar, there is a table with the following columns: ITEM, DESCRIPTION, QUANTITY, UOM, PRICE, EXT., TAX CODE, and ACTIONS.

Alternatively, you can also create a Customer Return from a **Shipped** or **Closed** Ship Doc by clicking the **Return** button.

## Processing Customer Return Transaction

Once the Customer Return has been created, the return can be processed by selecting the appropriate status from the drop down menu. On the top right side of the screen next to Status, use the drop down menu to change the status of the Customer Return. The following status options will be available for the Customer Return:

- Pending Return: Customer Return is on hold until items are received.
- Returned: The Items have been returned.
- Voided: The Customer Return has been voided.
- Closed: The Customer Return is closed.

When the status is not returned or closed, the inventory is shown as Pending Returns. Pending returns are not Owned until the customer actually returns.

When the Customer Return status has been changed to Returned, the item will be received and available in inventory.

Creating a PDF for the Customer Return

A Customer Return can be printed and emailed to the addressee.

1. Click the *Create PDF* icon next to the Customer Return number.



2. The PDF version of the Customer Return will open.
3. Click the *Save and Email* button to send out the PDF file. Alternatively, you can Save (only) the PDF file by clicking the *Save* button.

**CUSTOMER RETURN** Project021



Project021  
15  
Gaithersburg, MD 20878  
No. 3  
Date 3/13/2018  
Terms Due on receipt

**BILL TO** **SHIP TO**

Comp1 Comp1  
Comp1 Comp1

Save Save and Email Close

4. The *Send Email* screen will pop up. Fill out the fields. You will have the option to attach additional information, carbon copy individual in your company.
5. An email template is provided, select the appropriate template from the Template drop down box.
6. Click Send.

**Send Email** - x

Contact:

Additional To:

CC:

BCC:

Template:

Subject:

Body:

Attachment: Attach File

FILE:	SIZE:	ACTION:
Customer Return_3_1.pdf	51.78 KB	

Send Cancel

### Processing Partial Customer Returns - Return Select Items from Ship Doc

There are certain situations where a customer may need to return only part of an original shipment. If your business allows for partial returns, you have the capability of processing these returns as mentioned above by selecting the "Return Select Items From Ship Doc" option in Company Preferences.

From your Admin screen select Company Preferences and navigate to the Shipping preference. This will present the General preferences available for Shipping processes and towards the bottom of the page you will find the "Return Select Items From Ship Doc" checkbox. Check the box

and select Save in the upper right hand corner of the screen to allow for Partial Customer Returns.

OrderTime

Home Sales Purchasing Production Rentals Repair Warehouse Reports

Admin > Company Preferences

Company Preferences Save Reset

Section

- General
- Activities
- Doc #s
- Items
- Inventory
- Sales
- Shipping
- Payments
- Purchasing
- Receiving
- Production
- Lot / Serial #s
- Repair Orders
- Rentals
- Mobile
- Mail and Calendar Integration

General Packages

Shipping - General

- Automatically set the Quantity when creating a Ship Doc from a Sales Order. Leave unchecked to manually set the Quantity.
- When auto filling, skip items with lot/serial # tracking
- Allocate inventory from bins/lot or serial numbers with the smallest availability first.
- Deny shipping quantities greater than ordered.
- Allow new line items that were not on the original order to be added to Ship Docs
- Prevent shipping partial kits
- Enable signature capture
- Once shipped, line items with 0 quantity shipped should remain on the ship doc.

Default Location for Customer Returns

When creating Ship Docs from Sales Orders:

- Add the items to an unshipped Ship Doc having the same Customer & Location
- Add the items to an unshipped Ship Doc from the same Sales Order
- Always create a new Ship Doc

Other

- Hide markup on shipping estimator
- Prevent a user from printing twice when the Ship Doc is already marked as printed. (Hint: create a Role Exception for Printed so certain users cannot check the box).
- Transfer shipping charges to the first ship doc only from a sales order.
- Add Open Sales Order Items to Ship Docs
- Return Select Items from Ship Doc
- Use the posting date (date shipped) instead of the Ship Doc's date when updating the Sales Order's Date Shipped field.
- Do not reset the Posting Date on a ship doc when the status is reverted.

Status Change After Printing

Ship Docs

Transfers

Status Change After Batch Fulfillment

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Find information on issuing a customer credit here: [Customer Credit](#)