Customer Returns

Last Modified on 09/14/2023 3:38 pm EDT

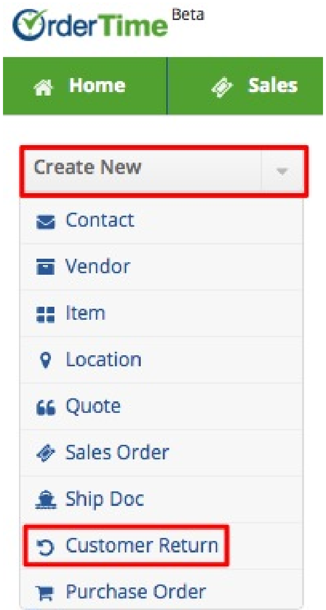
Overview

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.

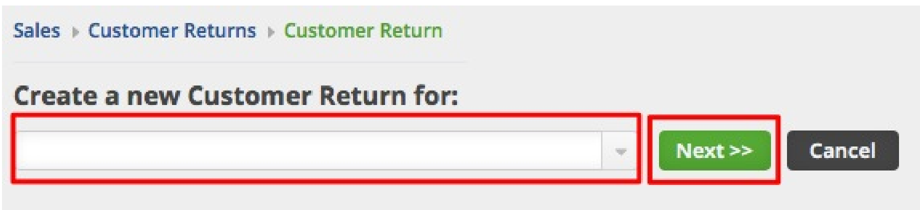
You will notice the Customer Return form is nearly identical to that of the **Ship Doc**. The only difference is the direction of the shipment: with Ship Docs, Items are shipping *from* you *to* the Customer; a Customer Return merely reverses the process.

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.



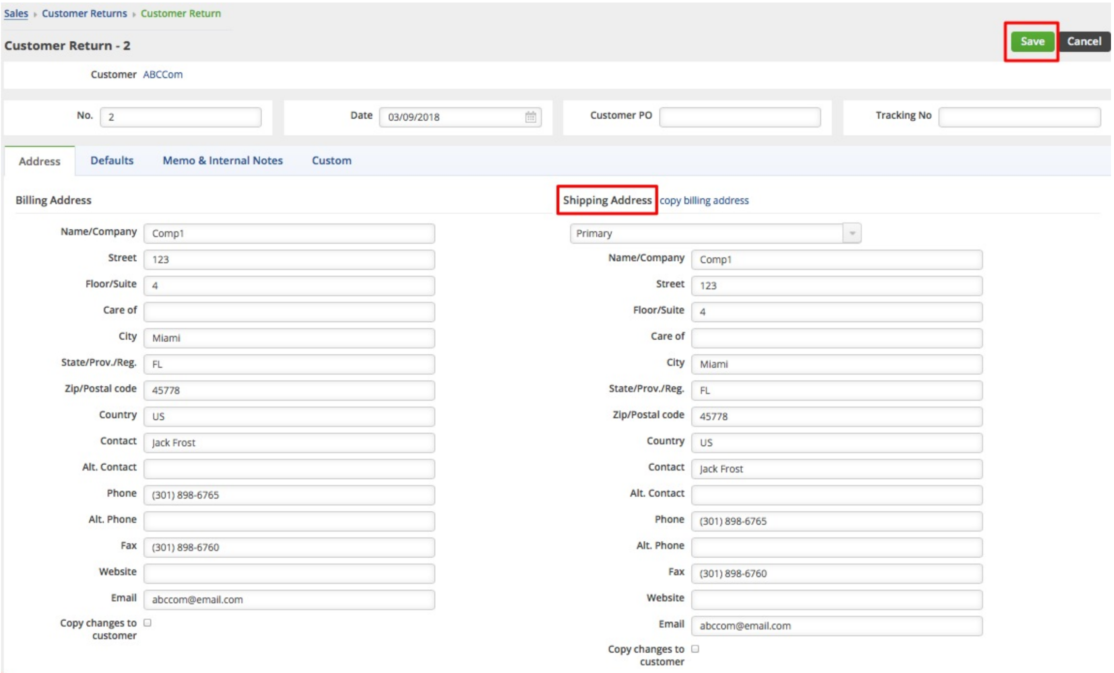
4. Enter the customer name on the *Create a new Customer Return for* box. A drop-down menu will provide you with a list of customers that are already in your database. Select the appropriate customer.
5. Click on **Next>>** to proceed to the next screen.



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

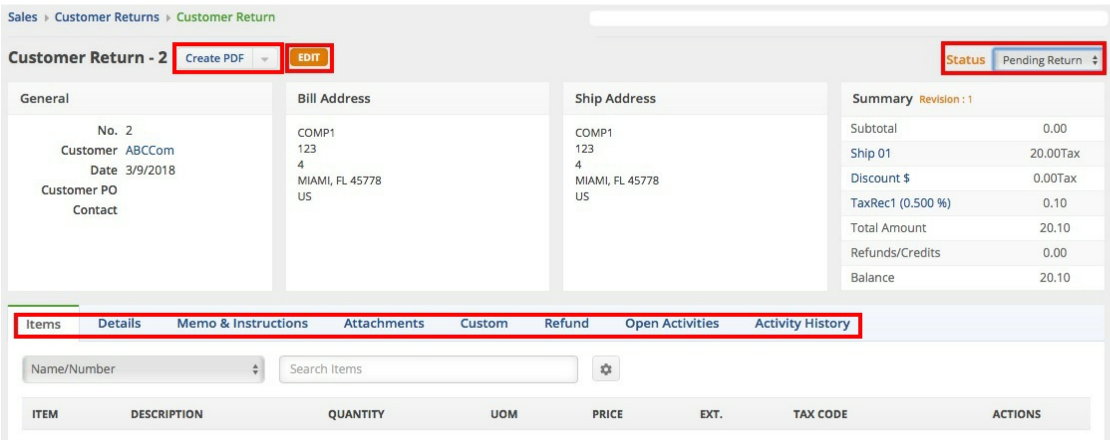
returned to the correct shipping address.

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**.

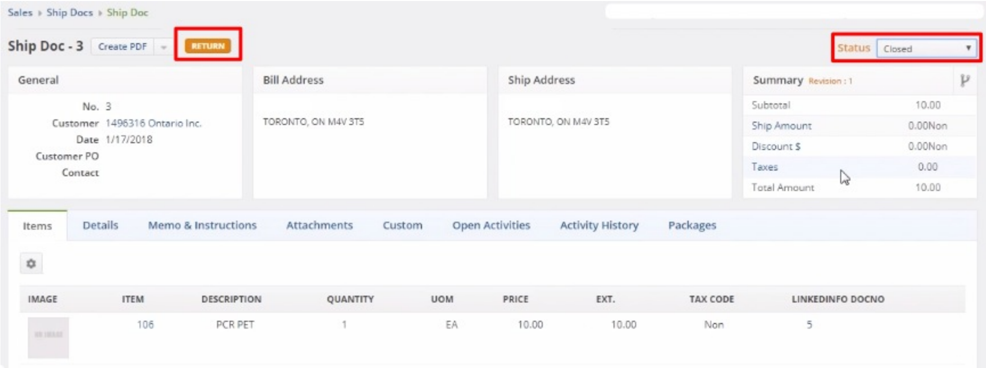


You can also do the following in the Customer Return page:

- 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.



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.

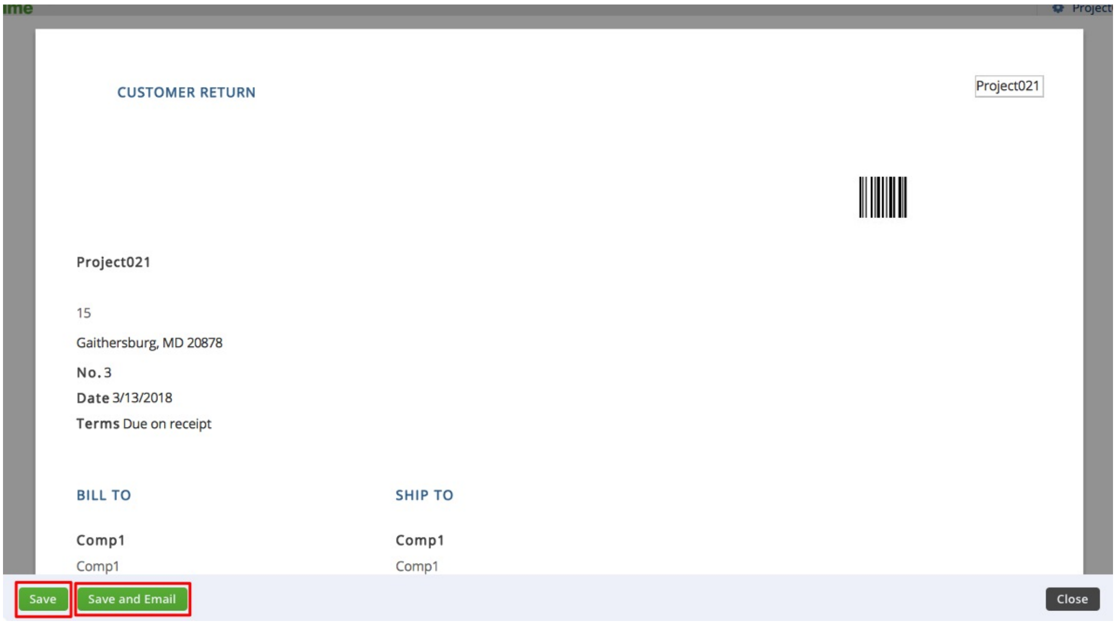
When the Customer Return status has been changed to Returned, the item will be received and available in inventory.

Creating a PDF for the Customer Return

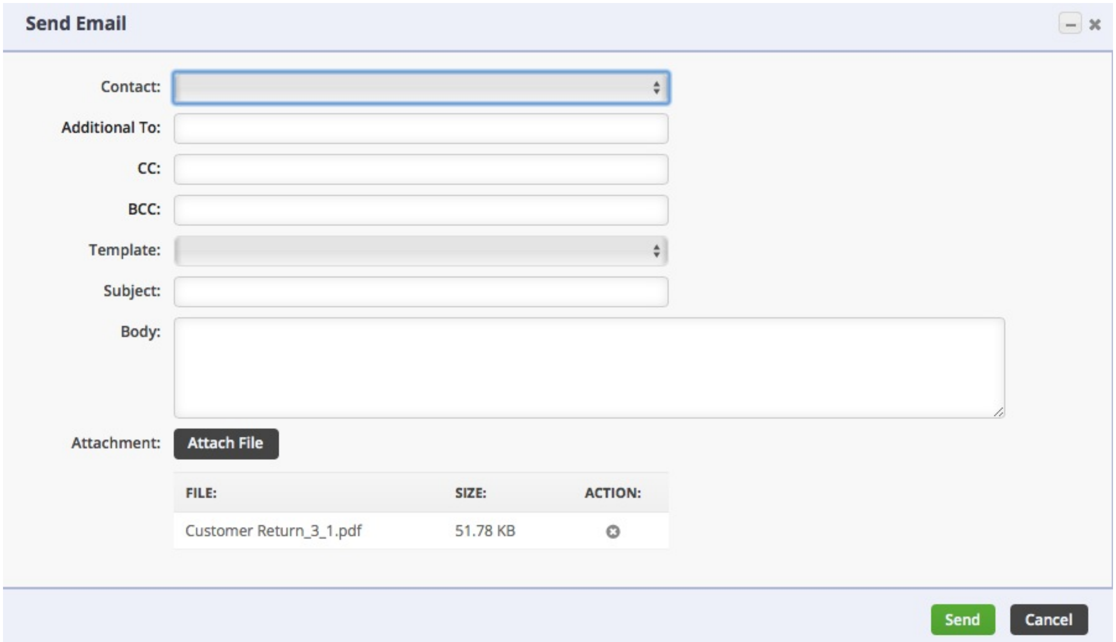
A Customer Return can be printed and emailed to the addressee.

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.



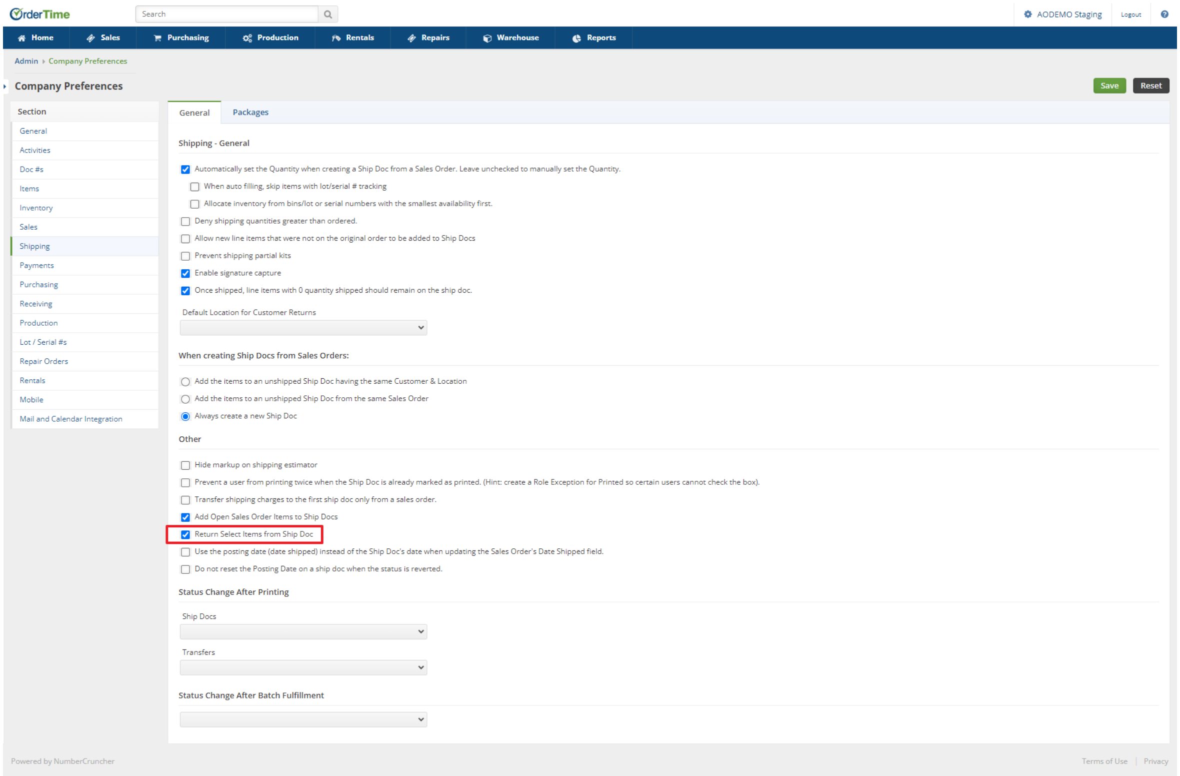
4. The *Send Email* screen will pop up. Fill out the fields. You will have the option to attach additional information, carbon copy individual in your company.
5. An email template is provided, select the appropriate template from the Template drop down box.
6. Click Send.



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.



Find information on issuing a customer credit here: Customer Credit