



RPM
® *REAL-TIME PARTS MANAGEMENT*

Warranty Labor Claim (RTV) Quick Reference Guide

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About this Guide

- Provides an overview of the steps involved to create and process a warranty labor claim.
- This guide does not cover all types of claim returns.

Who Should Read It?

- Store owners and store managers.
- Store personnel who process warranty labor claims.

1. Create an RTV Number for Warranty Labor Claim

Use the following steps to create a warranty labor claim RTV # in Store Operations.

Steps

1. On **RPM Central**, open **Store Operations**, ensure the correct site is displayed in the **Site #** field. If not, press F9 for a list of sites and select the site.
2. Go to **Return to Vendor > Return to Vendor**.

The following **RTV Document** screen displays.

The screenshot shows the 'RTV Document' screen with two main sections: 'General RTV Information' and 'Vendor RTV Address'. The 'General RTV Information' section includes fields for Ship Site # (1688), RTV #, Status (New), Change Status, Vendor ID, RTV Invoice #, Print Pick List, Return Type, Recall ID, Expiration Date, Return Date, RMA ID, Ship From Vendor ID, Ship Via, Shipping Cost (.00), # of Containers, and Tracking #. The 'Vendor RTV Address' section includes fields for Name, Address, City, State (AB), and Zip. There is also a 'View' section with 'All' and 'Discrepancy' options.

3. To create a warranty labor claim RTV # specify the following details on the **RTV Document** screen.

- **Vendor ID** If you know your primary DC Vendor, type it in the field and press **Enter**. If you do not know your primary DC Vendor, press F9 in the **Vendor ID** field to search for the Vendor ID, using the **Select Vendor** dialog.
- **Return Type** Type **DLC** and press **Enter**. Alternatively, press F9 for a list of return types, select **DLC CA – DEFECTIVE LABOR CLAIM** from the **List of RTV Return Types** screen and click **OK**.

The screenshot shows the 'List of RTV Return Types' dialog box. It has a search field labeled 'Find%' and a list of return types. The list is as follows:

Return Type	Description
CR	CE - DEFECTIVE (RETURN WITH CORES)
BLK	C1 - DEFECTIVE BLACK LABEL
DLC	CA - DEFECTIVE LABOR CLAIM
BCR	CH - BATTERY CORE RETURN
BWA	C3 - BATTERY WARRANTY ADJUSTMENT
RED	CR - DEFECTIVE RED LABEL
MISC	CM - MISCELLANEOUS
NM	CP - NEW MERCHANDISE RETURN
DCC	C5 - DEALER CUSTOMER CHANGEOVER
CSLC	C4 - COMPETITIVE STOCKING LINE CHANGEOVER

At the bottom of the dialog box are buttons for 'Find', 'OK', and 'Cancel'.

- **RMA ID** If the warranty labor claim is under \$50, an authorization number is not required, enter **Under \$50**. If it is \$50 or over enter the Samsclub/Manufacturers Return Authorization Number.

6. Specify the following labor claim details.

- **Claim Form #** If the warranty labor claim is through the manufacturer, enter the Manufacturers Form ID Number. If the warranty labor claim is through Sonsio, type *Sonsio* in the field.
- **Labor Claim Amt** Enter the total amount of labor refunded to the customer.
- **WLC Auth. #** If the warranty labor claim is under \$50, an authorization number is not required, enter *Under \$50*. If it is \$50 or over enter the Sonsio/Manufacturers Return Authorization Number.
- **Cust Received Credit** Click the drop-down list and select **Yes**, then click **Cancel**.

7. If the warranty item(s) are returned separately from the return RTV with the request for labor, do the following for each item.

8. If the warranty item(s) from the return RTV

- **MFG Code** Enter the item code. If there are multiple options, select the correct item and click **Use Selected**.
- **Return Qty Unit(s)** Enter the return quantity.
- **Reason** Press F9 and select code **14 Defective Labor Claim** from the **List of RTV Reason Codes** screen.
- Click on the **Info** button in **RTV Details**.
The **Labor Claim Information** dialog displays.
- Specify the following labor claim details.
 - **Claim Form #** If the warranty labor claim is through the manufacturer, enter the Manufacturers Form ID Number. If the warranty labor claim is through Sonsio, type *Sonsio* in the field.
 - **Labor Claim Amt** Enter the total amount of labor refunded to the customer.
 - **WLC Auth. #** If the warranty labor claim is under \$50, an authorization number is not required, enter *Under \$50*. If it is \$50 or over enter the Sonsio/Manufacturers Return Authorization Number.
 - **Cust Received Credit** Click the drop-down list and select **Yes**, then click **Cancel**.

9. Click the **Save** icon at the top of the screen.

The RTV is created and the **RTV #** displays in the **RTV #** field.

The screenshot shows a software window titled "RTV Document". Inside, there is a section labeled "General RTV Information". The form contains several fields: "Ship Site #" with the value "1688", "RTV #" with the value "13642" (highlighted with a yellow box), "Status" with the value "New", and a "Change Status" button. Below these are "Vendor ID" with the value "ATLL" and a "Print Pick List" button. Further down are "Return Type" with the value "DLC" and a dropdown menu showing "CA - DEFECTIVE LABOR CLAIM". At the bottom, there are fields for "Recall ID", "Expiration Date", "Return Date", and "RMA ID" with the value "Under \$50".

10. Record the RTV number.

2. Process the POS Defective Labor Claim

Prerequisites

Before processing a defective labor claim at POS ensure you have done the following.

- Created an RTV # for the warranty labor claim.
- Have the RTV # on hand.

Use the following steps to process the defective labor claim in POS.

Steps

1. Open Point of Sale (POS)

xPOS

New Order +

Customer Search

Qty Enter Item

Locations

Messages

NAPA Menu

Item Information

Item #	Description	Qty	List Price	My Price	Discount	Ext. Price	Taxed	Codes
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Delivery: No Delivery

Notes: Order #, Date: 04/24/19, Status, PO #, Attention, Note

Subtotal	Tax	Payments
0.00	0.00	0.00
Discount	Delivery	Due
0.00	0.00	0.00

Save Order, Save Quote, Send to Cashier, Complete Order

User:427187 Drawer:656 Register:724 Connection:Centrally connected Site:1688 - 025ATL WOODSTOCK 3:06 PM 04/24/2019

2. In the **Customer Search** field, type in the customer's name or business name and press **Enter**.

3. On the main **POS** screen, click on **Menu** and select **Warranty Labor Claim**.

The **Warranty Labor Claim** screen displays.

Warranty Labor Claim

*Item #

*Warranty Claim Amount

*Authorization #

*Claim Form #

OK Cancel

4. In the **Warranty Labor Claim** screen specify the following.

- ***item #** Enter the item number.



*If there are multiple items with the same **Item #**, select the correct item in **the Item Selection** screen and click **Use Selected**, then click **OK**.*

- ***Warranty Claim Amount** Enter the amount.

If the Labor amount is more than \$50 specify the following.

- ***Authorization #** Enter the Sonsio/Manufacturers Return Authorization Number
- ***Claim Form #** If the warranty labor claim is through the manufacturer, enter the Manufacturers Form ID Number. If the warranty labor claim is through Sonsio, type *Sonsio*.



The labor amount is capped at \$250, enter more than one warranty labor claim to reach the total.

5. Click **OK**.

6. On the main **POS** screen, click on **Menu** and select **Return**.

The **Return Mode** screen displays.

The screenshot shows the 'Return Mode' screen with a dark blue header. Below the header is a text prompt 'Please scan or enter (OrderSite-Orderid) numbers.' followed by a text input field. Below the input field are two buttons: 'Manual Return' and 'Item Search'. At the bottom are 'OK' and 'Cancel' buttons.

7. In the **Return Mode** screen, click on **Item Search** to search by the item number and date of purchase.

The **Transaction Search** screen displays.

The screenshot shows the 'Transaction Search' screen with a dark blue header. Below the header, the user name 'Peter Parker' is displayed. There are input fields for 'Item:' and 'Part:'. Below these are date pickers for 'From:' (01/24/19) and 'To:' (04/24/19), with an 'Apply' button. A section titled 'Select Order to Return' contains a table with columns: Date, Order #, Invoice #, Purchase Price, Purchase Qty, and Return Qty. At the bottom, there is a 'Return Qty:' input field with the value '1', and buttons for 'View Order', 'OK', and 'Exit'.

- In the **Transaction Search** screen, click on the **Item** field and enter the item number then press **Enter**.



*If there are multiple items with the same **Item #**, select the correct item in the **Item Selection** screen and click **Use Selected**, then click **OK**.*

- Modify the date range by clicking on the calendar buttons then click **Apply**.
A list of orders containing the item, within the specified date range displays.
- Select the order for return and click **OK**.

The **Select a Return Reason Code** screen displays.

- Click on the drop-down list for **Reason** and select **Defective** then click **Continue**.
- The **Return Instructions** dialog prompts for confirmation of the reason code selected, click **OK**.
- Click on **Exit** and then **Cancel**.



*Recall the RTV # you created from **Creating an RTV Number for Warranty Labor Claim**.*

- On the main **POS** screen, add the RTV # as a note on the order by clicking **Notes** at the bottom.

Item #	Description	Qty	List Price	My Price	Discount	Ext. Price	Taxed	Codes	Options
1515	UP WHEEL CYL REPAIR KIT	-1.00 EACH	15.42	9.89	0.00	-9.89			Options
1515	WLC WARRANTY LABOR CLAIM	-1.00 EACH	0.00	10.00	0.00	-10.00			Options

Subtotal	-19.89	Tax	-1.49	Payments	0.00
Discount	0.00	Delivery	0.00	Due	-21.38

The following **Order Information** screen displays.

Order Information

Order: 1688- Type: Manual Status: New

Authorized Buyer:

Customer PO:

Attention:

15. On the **Order Information** screen, click in the red text box and enter the RTV # then click **OK**.

16. When you are done adding warranty items to the invoice, click **Complete Order**.

The following **TENDERING** screen displays.

TENDERING

Customer Information Peter Parker (770) 777-7781 spidey@gmail.com Sales Rep.: None		Billing Type: Tax Exempt: No Primary Store: 1688 - 025ATL WO...	Order Totals Site Info Subtotal: \$12.64 Tax: \$0.95 Total: \$13.59	Tender Options >> <input type="button" value="Cash"/> <input type="button" value="Check"/> <input type="button" value="VISA"/> <input type="button" value="MasterCard"/> <input type="button" value="American Express"/>
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Current Tenders

Tender Type	Amount

Remaining Balance: \$13.59

Change Due To Customer: \$0.00

17. On the **TENDERING** screen, select one of the **Tender Options** and click **OK**.

The following **Print Order** screen displays.

Print Order

Print Order: 1688-1543890 for Peter Parker

Format:

Invoice: #178159 - 04/28/2019 - \$13.59

Printer:

Copies:

☒ Print Receipt
 ☐ Email Receipt



Make a note of the Invoice #.

18. Choose your **Printer** from the drop-down list and enter the number of invoice **Copies** needed.

19. Click **OK** to print.

3. Change RTV Status to *Initiated* then *Shipped* and Print RTV List

Use the following steps to initiate and ship the warranty labor claim RTV and print the RTV List.

Steps

1. On **RTV Document** in the **General RTV Information** area, click in the **RTV Invoice #** field and enter the **Invoice #** obtained from **POS**.

The screenshot shows the 'RTV Document' form. In the 'General RTV Information' section, the 'RTV Invoice #' field is highlighted with an orange box and contains the value '178103'. Other fields include Ship Site # 1688, RTV # 13642, Status New, Vendor ID ATLL, Return Type DLC, Recall ID, Expiration Date, Return Date, and RMA ID Under \$50. The 'Vendor RTV Address' section shows Name NAPA ATLANTA DC, Address 5420 PEACHTREE INDUSTRIAL BLVD, City NORCROSS, State GA, and Zip 30071. Buttons for 'Change Status' and 'Print Pick List' are visible.

2. Click on **Change Status** and select *Initiated* from the drop-down list then click **Apply**.

This block contains two screenshots. The top one shows the 'General RTV Information' section with the 'Change Status' button highlighted in orange. The bottom screenshot shows the 'New Status' dialog box with 'Initiated' selected in the drop-down menu and 'Apply' and 'Cancel' buttons.

3. In the **RTV Details** area, click in the **Ship Qty Unit(s)** field and enter the ship units for each item.

The screenshot shows the 'RTV Details' table. The first row has columns: MFG Code (1), Description (LABORCLAIM), Return Qty Unit(s) (1), Ship Qty Unit(s) (14), Reason (Defective Labor Claim), Reason Description (10.0000), Extended Cost (10.00), PO/RCV/RMA (Doc), Info, Attributes, and Comments. The 'Ship Qty Unit(s)' field is highlighted with an orange box.

MFG Code	Description	Return Qty Unit(s)	Ship Qty Unit(s)	Reason	Reason Description	Unit Cost	Extended Cost	PO/RCV/RMA	Comments
1	LABORCLAIM	1	14	Defective Labor Claim	10.0000	10.00	Doc	Info	Attributes

4. Click on **Change Status** again in the **General RTV Information** area and select *Shipped* from the drop-down list then click **Apply**.

The screenshot shows the 'New Status' dialog box with 'Shipped' selected in the drop-down menu and 'Apply' and 'Cancel' buttons.

5. Preview and print three PDF copies of the RTV document using the following steps.



Include the printed RTV list when shipping the return

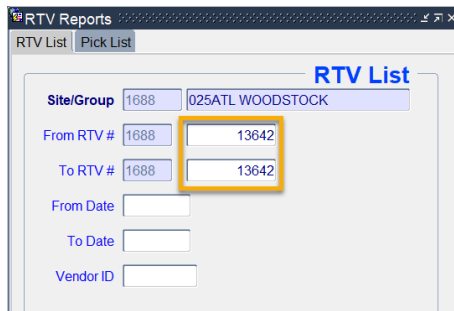
- a. On the **General RTV Information** area, click on the **Print Pick List** button.

The screenshot shows the 'General RTV Information' section of the RTV Document form. The 'Status' field now shows 'Shipped'. The 'Print Pick List' button is highlighted with an orange box. Other fields remain the same as in previous steps.

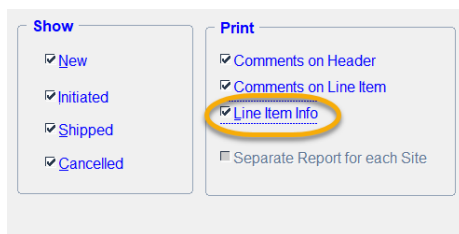
The **RTV Reports** dialog displays.

- b. Select the **RTV List** tab.

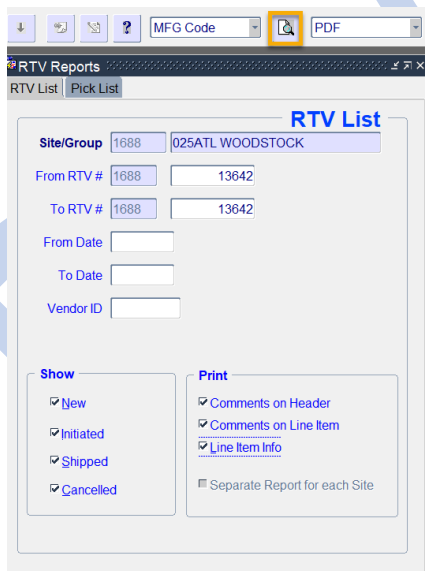
The **From RTV #** and **To RTV #** is automatically populated, if not enter the **From** and **To RTV** numbers.



- c. On the **Print** section, select **Line Item Info**.



- d. Click the **Preview Report** button on the top menu to preview the report as a PDF.



A PDF version of the RTV Document List displays.

- e. Print three copies of the PDF by hovering your mouse on the PDF report to display options, click the **Print** icon, select the printer, and click **Print**.



Include the printed RTV list when shipping the return

Remove a Warranty Item from RTV

Use the following steps to remove a warranty item from a regular RTV.

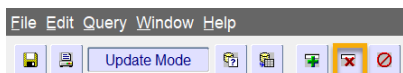
Steps

1. On **RPM Central**, open **Store Operations**, ensure the correct site is displayed in the **Site #** field. If not, press F9 for a list of sites and select the site.
2. To remove a warranty item from RTV, go to **Return to Vendor > Return to Vendor**.
3. In the **General RTV Information** area, click in the **RTV #** field and type in the **RTV #** or press F9 for a list of RTVs.



Choose the RTV that was initiated in **Printing the RTV List with Invoice Number** section.

4. Select your RTV with the **Return Type** of **DLC (Defective Labor Claim)** and **Status** of **Initiated** then click **OK**.
5. In the **RTV Details** section, select the line with the warranty item.
6. At the top of the screen click the **Delete Record** icon, click **OK**.



The warranty item is now deleted.

7. Click on the **Exit** icon to close the RTV.

