



LEADERS HOLDING CO.TM

Est. 1971

Exchanges / Returns / Credits / Re-Stocking Fee

(Return Authorization or RA)

To return an item, create an exchange, or take an item back for a store credit an order must be invoiced. An automatic process will run every 6 hours to invoice all appropriate orders.

If you recently completed a sale and the guest needs to return an item that has not been automatically billed, you must reach out to an office team member or regional manager for them to manually Bill/Invoice the Sales Order.

Why doesn't the Automatic Exchange Process work in the sandbox like it does in production?

- The custom programming to automate the exchange process references forms in the live system. The process errors out in the Sandbox because the system cannot reach these forms that are hardcoded.

Quick Facts

- ✓ In NetSuite, all returns, exchanges or credits are referred to as RAs which stands for Return Authorization.
- ✓ There are two different styles of RA
 - Stand Alone Return Authorization – returning a product or service not invoiced in NetSuite
 - Return Authorization Linked to an invoice in NetSuite.
- ✓ If the customer does not exist in NetSuite, you will need to add a customer record before proceeding with an RA.

Best Practice:

- ✓ Close all your unnecessary web browser tabs. If you have several tabs open it will be difficult to see the automation that will open in new browser tabs.
 - 0.14 Managing the Browser Window and Tabs

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Process Automation

Return Type	When	Automation
Equal/Unequal Exchange	To exchange for a like item or for a different item	On Return Authorization Save: <ul style="list-style-type: none"> ✓ Will write a new Sales Order for the exchange. ✓ Will associate the credit for the return once the return is received with the Invoice for the replacement sales order once it is fulfilled ✓ If the item is returning to your location you can receive it by clicking Receive & Issue Credit.
Store Credit	When returning an item(s) for store credit	On Return Authorization Save <ul style="list-style-type: none"> ✓ Will show you the return authorization. ✓ If the item is returning to your location you can receive it by clicking Receive & Issue Credit. ✓ Issue a gift certificate for the credit by following 5.5 Gift Certificates, Issuing a Gift Card for In-Store Credit.
Refund	When item(s) are returned for a refund	On Return Authorization Save <ul style="list-style-type: none"> ✓ Will take you to the refund screen

Entering an Associated Return Authorization

Original Sale & Invoice is in NetSuite

An Associated Return Authorization is used when you are processing a return or exchange for product where the sales order was originally written in NetSuite. Exchanges are initiated from an Invoice.

1. Pull up the original sale with the item you would like to return
2. Select the Related Records Tab and select the Related Records subtab

The screenshot displays the NetSuite interface for a sales order. The top navigation bar includes tabs for 'Items', 'Shipping/billing/signature', 'Communication', 'Transfer Orders', 'Delivery information', 'Related Records', and 'System information'. The 'Related Records' tab is selected, showing a table of related records. A red arrow points to the 'Related Records' tab, and a green arrow points to the 'Related Records' subtab. The table lists various records including Customer Deposit, Purchase Order, Item Fulfillment, and Invoice.

DATE	TYPE	NUMBER	STATUS	LINK TYPE	AMOUNT
11/25/2022	Customer Deposit	CDPTC18596	Fully Applied	Sales Order/Deposit	6,000.00
11/28/2022	Purchase Order	POPTC4326	Pending Receipt	Special Order	
11/28/2022	Purchase Order	POPTC4334	Pending Bill	Special Order	
12/19/2022	Customer Deposit	CDPTC18919	Deposited	Sales Order/Deposit	6,074.00
12/21/2022	Item Fulfillment	IF227484	Shipped	Receipt/Fulfillment	
12/22/2022	Invoice	INVPTC18370	Paid in Full	Order Bill/Invoice	11,870.88
12/22/2022	Item Fulfillment	IF227556	Shipped	Receipt/Fulfillment	

3. This will pull up the invoice and allow you to select the Initiate Return button.

The screenshot shows the Oracle Netsuite interface for a user named Samantha Randolph. The main header includes the Oracle Netsuite logo, the company name 'LEADERS HOLDING CO.', a search bar, and navigation links for Help, Feedback, and user profile. The main navigation bar contains links for Activities, Guests, Customers, Follow Up, Solutions Center, Success, and Products. The page title is 'Invoice' with a search icon. Below the title, the invoice number 'INVBRT85' and customer name '57272 Sam RMA' are displayed, along with a 'PAID IN FULL' status. A red arrow points to the 'Initiate Return' button. Other buttons include 'Solutions Case', a download icon, and an 'Actions' dropdown. A message box states 'You do not have access to Documents and Files.' The 'Primary Information' section shows the date '07/02/2019', invoice number 'INVBRT85', and customer '57272 Sam RMA'. It also lists the physical location 'Bradenton Showroom', sales rep 'Tim Newton', and sales rep 2. A 'Summary' table shows the subtotal '2,999.90', tax '209.99', shipping cost '0.00', total '3,209.89', and amount due after deposit '0.00'. A checkbox for 'ELIGIBLE FOR COMMISSION' is checked.

Summary	
SUBTOTAL	2,999.90
DISCOUNT ITEM	
TAX	209.99
SHIPPING COST	0.00
TOTAL	3,209.89
AMOUNT DUE AFTER DEPOSIT	0.00

4. You will then be brought to the Stand Alone Return Authorization Form where you will:
- Verify the customer Name and account number
 - Select the return type
 - Select the return method.

The screenshot shows the 'Stand Alone Return Authorization' form in Oracle Netsuite. The header includes the Oracle Netsuite logo, the company name 'LEADERS HOLDING CO.', a search bar, and navigation links for Help, Feedback, and user profile. The main navigation bar contains links for Activities, Transactions, Lists, Reports, Analytics, Documents, Setup, Customization, Integration, and Support. The page title is 'Return Authorization' with a search icon. Below the title, there are 'Save', 'Cancel', and 'Reset' buttons. A warning message states: 'Stand Alone Return Authorization. It appears that you are creating a stand alone return authorization. If this is part of a return process, please go back and start the return from the original customer invoice.' The '1. Primary Information' section shows the date '07/05/2019', RTN AUTH. # 'To Be Generated', and a customer selection dropdown. A green arrow points to the customer dropdown. The 'RETURN TYPE' dropdown is highlighted with a yellow arrow. The 'RETURN METHOD' dropdown is highlighted with a red arrow. The 'SALES REP' dropdown is set to '<Type then tab>'. The 'STATUS' is 'Pending Receipt' and the 'SCHEDULED PICK UP RECORD' is empty. A 'Summary' table shows the subtotal '0.00' and total '0.00'.

Summary	
SUBTOTAL	0.00
TOTAL	0.00

5. When you scroll down, the items on the original invoice will automatically be populated in the items section. Modify the items to only show what you want to accept a return on. Click the line to allow editing. Save when complete. The red wording on the top right of the Item tab will give instructions on how to:
 - a. Adjust quantities
 - b. Remove a line completely

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2. Items 3. Shipping / Billing Communication System Information

ESTIMATED READY DATE *
07/03/2019

ITEM SELECTION INSTRUCTIONS
Adjust Quantity: Select the quantity of each item you would like to return/exchange and click "OK."
Remove a Line: If you would like to remove a line completely, click it, the click "Remove."
Complete tab 3. Shipping / Billing before saving.

Items 299.99

Add Multiple Clear All Lines

ITEM *	DESCRIPTION	QUANTITY	RETURNED	REFUNDED	PRICE LEVEL	UNIT PRICE	AMOUNT	TAX	RETURN LOCATION *	SCHEDULE RETURN DATE	SK	RI	M
GARD-3211: GARD-3211.B.CRK	Armless Bistro Dining Chair, Stackable, B - Black Finish & CRK - Cork Weave Color, Empire	2	0		Retail Our Low	90.00	180.00	Yes	- Distribution Center				
<div> <input checked="" type="checkbox"/> OK <input type="checkbox"/> Cancel <input type="button" value="Make Copy"/> <input type="button" value="Insert"/> <input type="button" value="Remove"/> </div>													
GARD-3228: GARD-3228.B.CRK	28 Inch Round Bistro Dining Table, B - Black Finish & CRK - Cork Weave Color, Empire	1	0		Retail Our Low	119.99	119.99	Yes	- Distribution Center				

+ Add Row

Save Cancel Reset

6. Based on your Return Type selection the following will happen automatically.

Return Type	When	Automation
Equal/Unequal Exchange	To exchange for a like item or for a different item	On Return Authorization Save: <ul style="list-style-type: none"> ✓ Will write a new Sales Order for the exchange. ✓ Will associate the credit for the return once the return is received with the Invoice for the replacement sales order once it is fulfilled ✓ If the item is returning to your location you can receive it by clicking Receive & Issue Credit.
Store Credit	When returning an item(s) for store credit	On Return Authorization Save <ul style="list-style-type: none"> ✓ Will show you the return authorization. ✓ If the item is returning to your location you can receive it by clicking Receive & Issue Credit.
Refund	When item(s) are returned for a refund	On Return Authorization Save <ul style="list-style-type: none"> ✓ Will take you to the refund screen

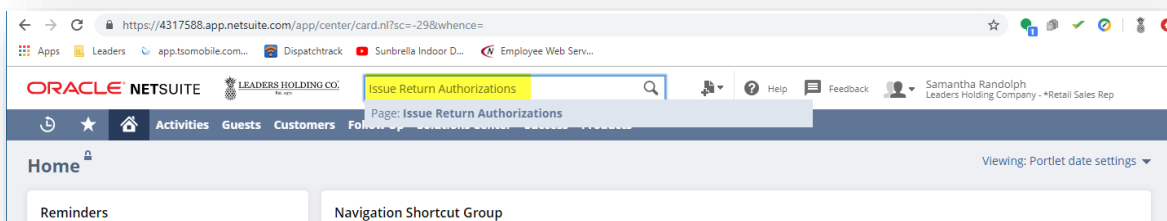
7. Complete the steps on the forms that are automatically created for your selected resolution and Save.

Entering Stand Alone Return Authorization

Original Sales Order Not In NetSuite

A Stand Alone Return Authorization is used when you are processing a return or exchange for product where the original sales order was not written in NetSuite.

1. To begin a new Stand Alone Return Authorization, type “Issue Return Authorizations” into the Global Search Bar, and select the option that comes up.



2. You will then be brought to the Stand Alone Return Authorization Form where you will:
 - a. Verify the customer Name and account number
 - b. Select the return type
 - c. Select the return method.

A screenshot of the 'Stand Alone Return Authorization' form in Oracle NetSuite. The form has a yellow header with a warning icon and text: 'Stand Alone Return Authorization. It appears that you are creating a stand alone return authorization. If this is part of a return process, please go back and start the return from the original customer invoice.' Below the header is a 'Return Authorization' section with 'Save', 'Cancel', and 'Reset' buttons. The '1. Primary Information' section contains fields for DATE (07/05/2019), RTN AUTH # (To Be Generated), CUSTOMER (a dropdown menu with a green arrow pointing to it), RETURN TYPE (a dropdown menu with a yellow arrow pointing to it), RETURN METHOD (a dropdown menu with a red arrow pointing to it), SALES REP (a dropdown menu), STATUS (Pending Receipt), and SCHEDULED PICK UP RECORD. On the right, there is an 'ACCOUNT NOTES' section and a 'Summary' table.

Summary	
SUBTOTAL	0.00
TOTAL	0.00

- Choose and estimated ready date based on the stock availability or vendor lead times for the product you will enter on the line items.

CREATED FROM: [] REPLACEMENT ORDER

2. Items 3. Shipping / Billing Communication System Information

ESTIMATED READY DATE *

ITEM SELECTION INSTRUCTIONS
Adjust Quantity: Select the quantity of each item you would like to return/exchange and click "OK"
Remove a Line: If you would like to remove a line completely, click it, the click "Remove."
Complete tab 3. Shipping / Billing before saving.

Items 0.00

Add Multiple Clear All Lines

ITEM*	DESCRIPTION	QUANTITY	CHARGE	PRICE	AMOUNT	TAX	RETURN LOCATION	SCHEDULE RETURN DATE	SCHEDULE RETURN METHOD	SCHEDULE RETURN RECORD	RELATED ORDER
<Type then tab>							<Type then tab>			<Type then tab>	<Type then tab>

▼ Add ✕ Cancel 📄 Copy Previous ➕ Insert 🗑 Remove

- Complete the information in the Shipping/Billing tab as well. When you are finished, click the save button.

2. Items 3. Shipping / Billing Communication System Information

RA FULFILLMENT INSTRUCTIONS
You will be able to schedule a pick up date after this from is saved. If the customer is bringing in the item(s) do not schedule a pick up date.

SHIP TO SELECT
6303 126th Ave

SHIP TO
Sam RMA
6303 126th Ave
Largo FL 33773-1864
United States

Map

BILL TO SELECT
6303 126th Ave

BILL TO
Sam RMA
6303 126th Ave
Largo FL 33773-1864
United States

Map

Save Cancel Reset

5. Based on your Return Type selection the following will happen automatically.

Return Type	When	Automation
Equal/Unequal Exchange	To exchange for a like item or for a different item	On Return Authorization Save: <ul style="list-style-type: none">✓ Will write a new Sales Order for the exchange.✓ Will associate the credit for the return once the return is received with the Invoice for the replacement sales order once it is fulfilled✓ If the item is returning to your location you can receive it by clicking Receive & Issue Credit.
Store Credit	When returning an item(s) for store credit	On Return Authorization Save <ul style="list-style-type: none">✓ Will show you the return authorization.✓ If the item is returning to your location you can receive it by clicking Receive & Issue Credit.
Refund	When item(s) are returned for a refund	On Return Authorization Save <ul style="list-style-type: none">✓ Will take you to the refund screen

6. Complete the steps on the forms that are automatically created for your selected resolution and Save.

Create a Restocking Fee

A restocking fee is charged when a guest wants to return a special order item. To create a restocking fee follow these steps.

1. Start an Associated Return Authorization using the instruction above
2. On the RA make the following selections
 - a. Return Type: Equal / Unequal Exchange
 - b. Return Method: Make the appropriate selection based on the agreement with the guest.
 - c. Edit the items on the Return Authorization item are to only show the items being returned
3. Click [Save](#)
4. The automation will automatically write a New Sales Order. Because you selected "Exchange," all of the items you left on the Return Authorization will be listed on the new Sales Order.
 - a. Remove all of the items off of the new Sales Order
 - b. Add "Lead-Restocking" and set the line value to the restocking fee
5. Click [Save](#)
6. Fulfill the Sales Order with the restocking fee on it.
 - a. The Sales Order with the restocking fee will show and open balance till the returned merchandise is received in Leaders possession.
7. The Return Authorization
 - a. Will be fulfilled by the distribution team when the product is picked up.
 - b. Should be fulfilled by the store team only when the customer brings product into the showroom.