Returns Administrator

Returns Administrator – Hand Book/ Full detailed objective by: Bryan Strickland

The returns administrator is in charge of all of the returns for the Day & Nite family of companies. After identifying and processing all returns contacting the vendors and process credits on all parts returned.

STEP 1 (ON BREAK)

Why do we place a WO status ON BREAK?

ON BREAK status on a WO that indicates parts need to be returned to the warehouse for a number of reasons:

- Parts were ordered incorrectly
- Parts were damaged
- Customer canceled WO
- Warranty returns

Only a logistic coordinator, FSS, FSM, BM & GM can change a WO status to **ON BREAK**.

Running ON BREAK Report (Sam Pro)

Click the link down below to learn to run an ON BREAK report using SAM PRO.

How to run a ON BREAK Report? (SAM PRO)

Locating and Processing ON BREAK parts

ON BREAK parts will be returned to the warehouse by the:

🛻 Delivery Driver

and placed in the returns section in the NY warehouse these returns will have a TAG with the WO number.

- **STEP 2** (LOCATING THE PARTS)

Now that we have successfully printed out the on break reports it's time to locate where each part is at. If you will notice the report is filled with Technician Id at the top and the total number of work orders that tech has. The technician Id tells us which tech/mechanic is which so I can look up their name. So let’s start with that first. Let’s say you have a report in front of you and it says Technician Id: 236 and we need to look up their name so we can identify the tech. For that click at the top of the page tab called “**WORKFLOW**” that tab should be in the middle at the top. Once you are on that page towards the left-click the “SERVICE MANAGEMENT” tab. From there click “**SERVICE SETUP**” this tab is in the middle of the page towards the top. Then click “**TECHNICIANS**”, CLICK **“NEW”,** this tab will be on the upper left, and in the TECHNICIAN ID TAB simply type in the ID on the Report which was “236”. After you enter in that number depending on where the company is at with its technicians a name should pop up of that technician and the contact of that technician. For this exercise, we are going to focus on just the Technician **Name** and the **email address.** Write down the Name of the Tech on the report for me the name that matched to this ID is Mark Stewart. Hold on to the email address as we will need it for later. Now each Report as I said before has work orders on them that the technician is doing. Each of those work orders has a part or parts that need to be returned that are marked “on break” my job is to go through each work order and find out which parts are marked on break. To find that we must search through the notes to find out which part is ON BREAK. Sometimes the reasoning is in the notes of the work order and sometimes the reasoning is in the attachments of the work order. For example, let’s say we go to work order “556282” because Mark Stewart has that on his “on break Report”. On the left-hand side, you will see a tab called noted click it and read through all of it to find a clue on what part is on break. Also there is a tab on the work order called “attach” click it and click “list”, after read through all of the “receipts “the tech has left. Usually there is some indication of what part needs to come back and why. Now after I figure out the parts that need to be returned I always write up everything on a spreadsheet. The spreadsheet that I personally make simply consists of the Tech name, Site Name, Manufacturer of the part, and the Part that needs to be returned. I have pasted an Example below of how the general spreadsheet looks like.

Aa Tech	Site Name	# Call Slip	Manufacturer	Parts
WES	CITIGROUP	575138	BLODGETT	PROBE ASSY, PILOT BURNER ,TEMP CONTROL

This process is then repeated for each tech in each division. Once the process is completed and I have gone through every technician seeing which parts they need to bring back to the office I send out an official On Break Report Group Email which will consist of each techs email (which you can look up in Sampro in the Technician tab as was explained previously), it will also consist of in the CC section of the email the warehouse manager, manager of that division, the dispatcher etc. Each division has different personnel to email. An example of the email is copied below.

“GOODMORNING THESE WERE THE LIST OF PARTS GENERATED THIS WEEK ON THE “ON BREAK” LINE. IF THERE ARE ANY

DISCREPANCIES FOR EXAMPLE **(YOU ALREADY TURNED THE PART IN, YOU INSTALLED IT, IT'S NOT IN YOUR POSSESSION ANYMORE ETC.)**

SIMPLY LET US KNOW BY REPLYING TO THIS EMAIL AND I WILL UPDATE THE RECORDS MANUALLY. THANK YOU AND HAVE A GOOD DAY.”

Aa Tech	Site	# Work Order	Parts that Need to be returned
JULIO	DIG INN SEASONAL	579397	WIRING HARNESS
THOMAS	CHEESECAKE	567391	WARRANTY POINT CONTROLLER
JYMMY	CHUCK E. CHEESE	578146	CARTRIDGE,CONDENSATE PUMP
Untitled	CHUCK E. CHEESE	582694	FIRE EYE SENSOR
JASON GALE	HOMETOWN BAR-B	578129	PLEATED AIR FILTER

Now after I send this email out the technicians will drop the parts off to the shop or hand it off to the drivers so they can drop it off to the shop.

- **STEP 3 (**PROCESSING THE RETURN**)**

Now that I have the parts and they are in my possession it's time to start the "return process". For example, let's say technician **Julio** has just returned a **"wire harness",** First I need to inspect it making sure the part shows no physical signs of damage or looks used. Everything that will be returned must be "NEW AND UNUSED". Once the observing test is done I go into the call slip to look deeper into the part and more importantly why it is being returned. Now when looking up on breaks in STEP 1 sometimes I write my own notes on the actual report I have filled out on each part but to double check you can re-look up the part. Once everything is checked out and I have confirmed that everything is new and unused I will continue to the return process. Once you are in the call slip click on the bottom tab that says "TECHNICIAN", look for the status that says "on break" click it and click the "DELETE LINE "button located on the left side panel. This takes that status off so I won't ask the tech again for the part. From their click on the button to the right that says "RETURN TO INVENTORY". A panel is going to pop up asking where do you want to return it too. In the "LOCATION ID" tab you are going to put it to either "ALS-RETURN" meaning this part is going to be returned back to the vendor or ALS-MAIN meaning this is a part we normally use and will stick it in our personal warehouse as stock. Every division has a return or main. So for example let's say we were in the refrigeration division than the two categories would be REF-RETURN" & REF-MAIN". So I'm going to return this particular part so in the tab I am going to type "ALS-RETURN" then click "next", find the part or parts I want to return, click on the part and under the "TO RETURN" category type the quantity you are going to return. Then click finish at the bottom left. This puts that part into the system as being returned. Once you are done now it’s time to put in a note indicating that the part is in returns and the reason. So within the work order on the left side click “NOTES” then click New. Usually I add in the note saying the part number and the reason why it is in returns.

- **STEP 4 (**RETURNING THE ACTUAL PART - RETURN AUTHORIZATION**)**

Now once everything is processed and the part is double checked making sure it is new and unused it’s time to find the vendor we bought it from so I can return it back to them. For this go into the call slip of the part. On the left hand side, you are going to find a tab that says attachments click it and in that there should be attached a document entitled AP INVOICE. This is the invoice that is attached locate it with the part you have attached on it and print it out. Now if there is no invoice attached then go back to the call slips main page. And at the top click the tab purchases. Locate your part that you want to return and double click it. A screen of the purchase order will appear and the vendor will be present. From there I will reach out to the vendor via email or a phone call telling about the part giving them the necessary information and making the request for a return. Most vendors give an authorization number sometimes being a document or just them telling you a number that pretty much indicates to them that they will accept it back. From there I will pack the part up in a box fill out the packing slip and write that RETURN AUTHORIZATION NUMBER ON THE PACKING SLIP. Create the Credit Purchase Order then send it out to the warehouse so it can be shipped via UPS GROUND .

- **STEP 5 (**THE OUTER MARKETS**)**

With the outer markets its pretty much the same concept the only difference is I can’t physically be there to observe nor ship the part. In each of our outer market divisions I have a key person usually a manager that I am in constant communication with. I runt the “on break” reports for them send it out the technicians and communicate with the manager to be my eyes and ears. They will let me know the condition of the part and make their return as soon as I receive the return authorization for them.

- **STEP 6 (**THE IRB PROJECT**)**

There are certain parts that are “non-returnable” for various reasons. Sometimes the vendor won’t take parts back after a certain period of time, sometimes the vendor just does not take returns back whatever the case might be from there I set the parts aside in a box labeled IRB. These parts that the vendor does not take back will be attempted to be returned in an alternative way. Every once in a while the vendors Partstown & Heritage will purchase from us so usually I will put it off until I receive a good amount and make a request to return to them. For parts that are not accepted I will notify upper management and let them make the final decision if to throw the part out or not.