Returns Process

PHX011

Contents

Purpose

The purpose of this process is to ensure that goods are returned where acceptable to all parties, in good condition and in a timely fashion.

Scope

The process applies to all sales, customer services, operations personnel and the relevant customers and suppliers.

Responsibility

It is the responsibility of the sales personnel to initiate the request to return goods, the customer services personnel to action and follow through to completion the return of the goods to Phoenix and supplier. The operations personnel to support the necessary transportation of goods.

Procedures

Cancellation

In cases where goods have not been shipped, a cancellation takes place. Customer services personnel check if goods have been despatched by the supplier. Microsoft goods are checked by operations. If not, the status of the order can be adjusted on the system and a replacement order processed.

Customer Return - Purchased Products

A customer contacts the Account Manager to request the return of goods. The Account Manager raises a Cancellation request against the Sales Order detailing which items, quantities, and reason for return. Customer service personnel raise the Returns Authorisation (RA) record.

An agreement is reached with the supplier regarding the return of the goods.

Depending on product type the method of return is one of the following:

- physical goods over the value of £50 are collected by courier.
- physical goods under the value of £50 are returned via freepost address.
- electronic goods are destroyed following signature and return of Letter of Destruction.
- returned goods are returned directly to supplier who inspect for acceptance physical condition.

- supplier Credit Note and Phoenix Credit Note are raised.
- suitable products may be returned to stock for resale with authorisation from Operations.

See Customer Return Process – Purchased Products Flowchart

Customer Return - Reported Products

A customer contacts the Account Manager to request the return of goods. The Accounts Manager raises a cancellation request against the Sales Order detailing which items, quantities, and reason for return. Customer service personnel raise the RA record.

Customer service personnel check the status of the reported item and ask Operations to identify where it is in the process and adjust accordingly. If the item is at 'Not Yet Reported' status, the item is removed from the Reportable Items List by Operations. Operations personnel will contact the supplier to verify if items can be returned and credited.

If return is agreed, the supplier provides a Credit Note and the Phoenix Credit Note is raised along with a negative Order Acknowledgment to cancel the reported item with the customer.

See Customer Return Process – Reported Products Flowchart

Credit notes can also be generated by the Sales Managers in cases such as price corrections, delivery charges. Sales Managers raise an Oasis Refund Request – which is emailed to customer services who will do an Oasis refund credit – which is then automated into Sage for sending to the customer.

VAT queries need to be requested via a credit request form to accounts who do the VAT checks before raising a manual Sage credit to rectify the VAT.

Notes of these transactions are recorded manually on the Oasis Sales Order and on the "Credit" Excel sheet for tracking purposes

Supplier Return

Goods Inwards identify goods that are damaged or are incorrect items. Goods are booked in against the purchase order and customer services are contacted to raise a return with the supplier.

Customer Service personnel notify the Supplier regarding the damaged/incorrect goods and request authorisation to return and be credited.

Supplier arranges collection of goods and issues a credit note.

A replacement order is generated in the Sales application by Customer Services and checked by the relevant Account Manager. Once approved by the Account Manager the order is processed following the normal process.
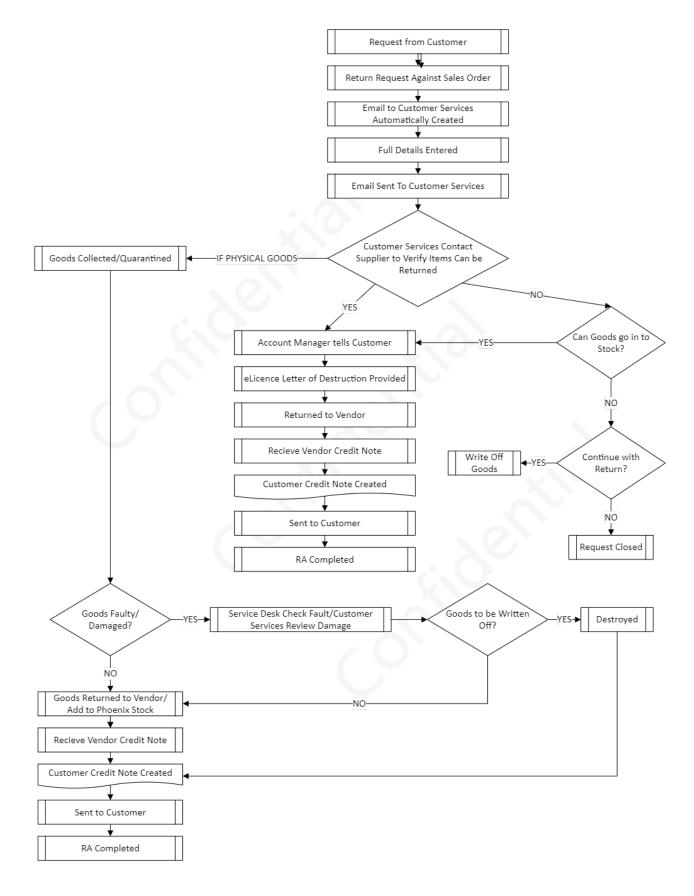
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Please treat this information as private and confidential.

Customer Return Process Flowchart


```
Request from Customer
        │
        ▼
Return Request Against Sales Order
        │
        ▼
Email to Customer Services
Automatically Created
        │
        ▼
Full Details Entered
        │
        ▼
Email Sent To Customer Services
        │
        ▼
◆ Customer Services Contact Supplier to Verify Items Can be Returned ◆
```

Goods Collected/Quarantined ← IF PHYSICAL GOODS

YES →
- Account Manager tells Customer ← YES ← ◆ Can Goods go in to Stock? ◆ ← NO
- eLicence Letter of Destruction Provided
- Returned to Vendor
- Recieve Vendor Credit Note
- Customer Credit Note Created
- Sent to Customer
- RA Completed

Can Goods go in to Stock? → NO → ◆ Continue with Return? ◆ → YES → Write Off Goods

Continue with Return? → NO → Request Closed

◆ Goods Faulty/ Damaged? ◆ → YES → Service Desk Check Fault/Customer Services Review Damage → ◆ Goods to be Written Off? ◆ → YES → Destroyed

Goods Faulty/ Damaged? → NO → Goods Returned to Vendor/ Add to Phoenix Stock

Goods to be Written Off? → NO → Goods Returned to Vendor/ Add to Phoenix Stock

- Goods Returned to Vendor/ Add to Phoenix Stock
- Recieve Vendor Credit Note
- Customer Credit Note Created
- Sent to Customer
- RA Completed

Version Control

Author	Version	Date	Description
QMS	1.0	01/05/2016	Original Document
Accounts	1.0	30/12/2017	Annual review – no changes
Accounts	1.0	30/12/2018	Annual review – no changes
Accounts	1.0	05/12/2019	Annual review – no changes
Accounts	1.0	11/11/2020	Annual review – no changes
Natasha Jefferson	2.0	11/11/2021	Customer return changes
Natasha Jefferson	2.0	10/11/2022	Annual review – no changes

Document Approval

Name	Version	Date	Position
Sam Mudd	1.0	01/05/2016	Managing Director
Sam Mudd	1.0	30/12/2017	Managing Director
Sam Mudd	1.0	30/12/2018	Managing Director
Sam Mudd	1.0	05/12/2019	Managing Director
Sam Mudd	1.0	11/11/2020	Managing Director
Sam Mudd	2.0	11/11/2021	Managing Director
Clare Metcalfe	2.0	18/11/2022	Operations Director

Signed: *Clare Metcalfe* Clare Metcalfe, Operations Director

Dated: 18/11/2022