Administrator's Guide

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SAP Intelligent Returns Management | 1.0

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Warning

Global Settings

This section describes the basic settings about number, date and time format, company profile and so on.

For more information, see the following topics:

Configuring Regional Settings

Define basic system settings, such as decimal notation, date and time format, language, currency, and length.

Procedure

1. In the navigation tree, choose **Settings** > **Global Settings**.
2. On the **Basic Setup** tab, choose **Edit**, and do the following:
   - In the **Decimal Notation** section, specify how you want to show all numeric values in the application. You can select the thousand separator and decimal separator, and determine the number of decimal places and the rounding rule for any price, quantity and percentage values.

     Note

     In the Standard rounding, two rounding directions can apply. If the rightmost number in the fractional part is 1 through 4, it is rounded down; if 5 through 9, it is rounded up. If you select Up or Down, however, the number is always rounded, respectively, up or down, regardless of the number value.

   - In the **Date and Time Format** section, select the date format and time format.

     This will be used as the system default. The individual users can change their own settings via **Profile Settings**.

- In the **Language** section, select the language.

  This will be used as the default system language for all the users. The individual users can change their own settings via **Profile Settings**.

- In the **Currency Settings** section, select the default local currency, whether you want to show ISO currency code or currency symbol, and whether it's shown before or after the monetary value.

- In the **Length** section, select the default unit of length: imperial (miles) or metric (kilometers).

3. Choose **Save**.

Parent topic: Global Settings

Related Information

Defining the Company Profile
Brands
Regions
Managing Return Reasons
Managing Payment Methods
Managing Workstations
Managing Countries of Origin
Managing Carriers

Defining the Company Profile

Define company profile settings, such as company name, company location, and contact information.

Procedure

1. In the navigation tree, choose **Settings** > **Setup**.

2. On the **Company Profile** tab, choose **Edit**, and do the following:

   - In the **Company** section, enter your company name that will appear in the return notification email sent to your customers.

   - In the **Location** section, enter your company location and time zone.

     Note

     The time zone cannot be changed in a system that already has transaction data.

   - In the **Contact** section, maintain your company contact information, including the Return Portal URL where your customers can initiate a return.

3. Choose **Save**.

Parent topic: Global Settings

Related Information

Configuring Regional Settings

Brands

Manage and configure brands.

Brands can be used as a dimension to define a user's responsibilities or a configuration profile for a Settings Area.

For more information, see the following topics:

Managing Brands
Manage brands.
Configuring Brands
Configure brands.

Parent topic: Global Settings

Related Information

Configuring Regional Settings
Defining the Company Profile
Regions
Managing Return Reasons
Managing Payment Methods
Managing Workstations
Managing Countries of Origin
Managing Carriers

Managing Brands

Manage brands.

Procedure

1. In the navigation tree, choose **Settings** > **Setup**.
2. On the **Brands** tab, select **Brands**, and do any of the following:
   - Add one or more brands.

     Note
     Brand IDs are generated by the system, and each new ID self-increments by one.

- Select an entry, choose **Edit**, and then modify the name or description of any existing brands.
- Select a brand to delete it.

3. Choose **Save**.

Parent topic: Brands

Related Information

Configuring Brands

Configuring Brands

Configure brands.

Procedure

1. In the navigation tree, choose **Settings** > **Setup**.
2. On the **Brands** tab, select **Brands Configuration**, and do any of the following:
   - Add a brand configuration by selecting the brand id, and one or more sales organizations, distribution channels, and divisions.

     Note

     Only the brand ID is mandatory. All other fields can remain empty.

   - Select an entry, choose **Edit**, and then modify the selected brand configuration.
   - Select one or more brand configurations at the same time to delete them.
3. Choose **Save**.

Parent topic: Brands

Related Information

Managing Brands

Regions

Manage and configure regions.

Regions can be used as a dimension to define a user's responsibilities or a configuration profile for a Settings Area.

For more information, see the following topics:

Managing Regions
Manage regions.
Configuring Regions

Configure regions.

Parent topic: Global Settings

Related Information

Configuring Regional Settings
Defining the Company Profile
Brands
Managing Return Reasons
Managing Payment Methods
Managing Workstations
Managing Countries of Origin
Managing Carriers

Managing Regions

Manage regions.

Procedure

1. In the navigation tree, choose **Settings** > **Setup**.
2. On the **Regions** tab, select **Regions**, and do any of the following:
    - Add one or more regions.

      Note

      Region IDs are generated by the system, and each new ID self-increments by one.

    - Select an entry, choose **Edit**, and then modify the name or description of any existing regions.
    - Select a region to delete it.
3. Choose **Save**.

Parent topic: Regions

Related Information

Configuring Regions

Configuring Regions

Configure regions.

Procedure

1. In the navigation tree, choose **Settings** > **Setup**.
2. On the **Regions** tab, select **Regions Configuration**, choose **Edit**, and do any of the following:

- Add a region configuration by selecting the region id, and one or more sales organizations, distribution channels, and divisions.

  Note

  Only the region ID is mandatory. All other fields can remain empty.

- Select an entry, choose **Edit**, and then modify the selected region configuration.
- Select one or more region configurations at the same time to delete them.

3. Choose **Save**.

Parent topic: Regions

Related Information

Managing Regions

Managing Return Reasons

Manage the return reasons used in return initiation.

Procedure

1. On the **Return Reasons** tab, choose **Edit**.
2. Choose **Add**.
3. Specify the following fields:

Field	Description
Code	Specifies the return reason code. Use alphanumeric characters (letters and numbers). For example, 01, M12, and so on. The max length of the code is 5. The code must be unique.
Return Reason	Specifies the unique return reason. Use free texts, for example, Fit too small.
Return Reason Category	Specifies the return reason category. Return reason categories improve routing guidance in machine learning models. Select one category from the dropdown list.

4. Choose **Save**.

Note

You can modify the settings only if the return reason hasn't been used in any transaction.

Parent topic: Global Settings

Related Information

Configuring Regional Settings
Defining the Company Profile
Brands
Regions
Managing Payment Methods
Managing Workstations
Managing Countries of Origin
Managing Carriers

Managing Payment Methods

Manage the payment methods that the consumer will see in the Return Order Summary on Return Portal or in email notifications after refund has been issued.

Procedure

1. In the navigation tree, choose **Settings** > **Setup**.
2. On the **Payment Methods** tab, choose **Edit**.
3. Do any of the following:
   - To update a payment method, change the values for **Code** and **Payment Method**.
   - To delete a payment method, select the delete button.
   - To add a payment method, choose **Add**, and then enter values for **Code** and **Payment Method**.

   Note
   You cannot delete or update a payment method that has already been used in any transaction.

4. Choose **Save**.

Parent topic: Global Settings

Related Information

Configuring Regional Settings
Defining the Company Profile
Brands
Regions
Managing Return Reasons
Managing Workstations
Managing Countries of Origin
Managing Carriers

Managing Workstations

Manage workstations.

Parent topic: Global Settings

Related Information

Configuring Regional Settings
Defining the Company Profile
Brands
Regions
Managing Return Reasons
Managing Payment Methods
Managing Countries of Origin
Managing Carriers

Managing Countries of Origin

Manage countries of origin.

Parent topic: Global Settings

Related Information

Configuring Regional Settings
Defining the Company Profile
Brands
Regions
Managing Return Reasons
Managing Payment Methods
Managing Workstations
Managing Carriers

Managing Carriers

Manage a global list of carriers and shipping services.

This carrier list captures all possible carriers and shipping services to be used in the dispositioning application. The carrier information needs to be further maintained on the **Settings** > **Dispositioning** > **Carriers** page. For details, see Managing Carriers. Such carrier information is marked as In Use and, for example, listed in the **Carrier** and **Shipping Service** dropdowns for the warehouse staff to provide carrier information when creating unplanned or mystery returns.

Note

The enabled carrier on the **Settings** > **Shipping** page is automatically available for use in the system. There is no need to add it to the global list.

Procedure

1. In the navigation tree, choose **Settings** > **Setup**.

2. On the **Carriers** tab, do any of the following:

- To add an entry, choose **Add**, provide required information, and then choose **Save**.
- To edit an entry, choose an entry that is not In Use, choose **Edit**, update as necessary, and then choose **Save**.
- To delete an entry, choose an entry that is not In Use, choose **Delete**, and then confirm that you want to delete the selected entry.

Parent topic: Global Settings

Related Information

Configuring Regional Settings
Defining the Company Profile
Brands
Regions
Managing Return Reasons
Managing Payment Methods
Managing Workstations
Managing Countries of Origin

User Management

This section describes the user management settings.

For more information, see the following topics:

Processing Teams
Define and manage processing teams and processing team members.

Processing Teams

Define and manage processing teams and processing team members.

A processing team is a group of processors within the same team, for example, a customer service team, a warehouse specialist team, and so on.

A user can be assigned only to one processing team.

For more information, see the following topics:

Managing Processing Teams
Manage processing teams.
Managing Team Members
Manage team members.

Parent topic: User Management

Managing Processing Teams

Manage processing teams.

Procedure

1. In the navigation tree, choose **Settings** > **User Management**.
2. On the **Processing Teams** tab, select **Processing Teams**, and do any of the following:
    - Add a processing team
    - Edit one team at a time.
    - Delete one or more teams.
3. Choose **Save**, when you are adding or editing a team.

Parent topic: Processing Teams

Related Information

Managing Team Members

Managing Team Members

Manage team members.

Procedure

1. In the navigation tree, choose **Settings** > **User Management**.
2. On the **Processing Teams** tab, select **Team Members**.
3. In **Processing Team**, select a team where you want to manage team members, and do any of the following:
    - Add a member. To find one or more specific users, use search or apply the **Processing Team** filter in the **Add Team Members** dialog.
    - Use search to find a team member.
    - Delete one or more team members.

Parent topic: Processing Teams

Related Information

Managing Processing Teams

Return Settings

This section describes return settings.

For more information, see the following topics:

[Returns](#)

Define and manage the return settings for e-commerce and retail stores. Enabling either of the purchase channels disables the other.

[Configuring Return Routes](#)

Configure your preferences on the return routes, parameters for the AI engine to recommend the best return options, and specific settings for different return routes.

[Selecting the Return Portal Theme](#)

Specify the theme you want to apply to the Return Portal.

[Return Eligibility](#)

Configure the return eligibility policy and and manage return exceptions.

[Defining Configurable URLs](#)

Define URLs to enable the customer to access the retailer's existing pages.

Returns

Define and manage the return settings for e-commerce and retail stores. Enabling either of the purchase channels disables the other.

When returns of e-commerce purchases are enabled, customers can initiate returns for online purchases. When returns of retail store purchases are enabled, customers can initiate returns for in-store purchases. With additional setting on the pages, customer service representatives have the possibility to initiate return orders on behalf of customers.

For more information, see the following topics:

[Configuring Returns of E-commerce Purchases](#)

Configure returns of e-commerce purchases.

[Configuring Returns of Retail Store Purchases](#)

Configure returns of retail store purchases.

Parent topic: Return Settings

Related Information

Configuring Return Routes
Selecting the Return Portal Theme
Return Eligibility
Defining Configurable URLs

Configuring Returns of E-commerce Purchases

Configure returns of e-commerce purchases.

Procedure

1. In the navigation tree, choose **Settings** > **Return Settings**.

2. On the Returns tab, select E-commerce, choose Edit.

3. Turn the Enable Returns of E-commerce Purchases toggle on.

4. Select return options.

   By default, mail return (drop-off) is enabled.

5. In the Settings section, set the following parameter:

   - Sales Order Display Period: Specify how long customers and customer service representatives will see the sales orders. The number range is from 1 to 999.

6. In the Warehouse Settings section, in the Warehouse Processing Returns field, choose Originating Warehouse to deliver the returns back to the warehouse where the sales order was fulfilled, or select a specific warehouse to receive and process returns.

7. In the Customer Service Settings section, use the Enable Returns for Registered User toggle to turn on or off initiation of returns for registered users.

8. In the Return Reasons section, do the following:

   a. Choose Add and select a return reason. Repeat this to define the return reason dropdown for the returns of e-commerce purchases.

   b. Use the direction arrows to configure the specific display order of return reasons for the customers and customer service representatives.

      Note

      If the return reason drodown is empty, check if Settings > Setup > Return Reasons has been configured.

9. Choose Save.

Parent topic: Returns

Related Information

Configuring Returns of Retail Store Purchases

Configuring Returns of Retail Store Purchases

Configure returns of retail store purchases.

Procedure

1. In the navigation tree, choose Settings > Return Settings.

2. On the Returns tab, select Retail Store, choose Edit.

3. Turn the Enable Returns of Retail Store Purchases toggle on.

4. Select return options.

   By default, mail return (drop-off) is enabled.

5. In the Settings section, set the following parameters:

- **Maximum Item Discount for Online Returns**: Specify the maximum discount for the store-purchased items that can be returned online. If a store purchase has items discounted over this threshold, any item in this purchase has to be returned in store for refund.
- **Type Code of Sales POS Transaction**: Specifies the type code indicating that the item belongs to a sales POS transaction.
- **Type Code of Return POS Transaction**: Specifies the type code indicating that the item belongs to a return POS transaction.

6. In the **Store Receipt Number Configuration** table, configure the segments that the store receipt number comprises. For each segment, you can define the following:
   - **Number**: This is automatically generated and indicates the relative position of the segments.
   - **Number of Digits**: Specify how many digits this segment has.
   - **Number Segment**: Select what the segment refers to.
7. In the **Online Order Redirection on Return Portal** section, set the following parameters:
   - **Enable Online Order Redirection**: Use the toggle to turn on or off online order redirection on Return Portal.
   - **Online Order ID Conditions**: Specify one or more conditions the online order ID must meet.
   - **Redirect URL**: Specify the URL the customer must be redirected to on entering an online order ID that meets the defined online order ID conditions.
   - **Redirect Title**: Specify the title of the redirect message shown on Return Portal.
   - **Redirect Text**: Specify the text of the redirect message shown on Return Portal.
   - **Redirect Button Text**: Specify the text of the redirect button shown on Return Portal.
8. In the **Warehouse Settings** section, in the **Warehouse Processing Returns** field, select the warehouse to receive and process returns.
9. In the **Customer Service Settings** section, use the **Enable Returns for Guest User** toggle to turn on or off initiation of returns for guest users.
10. In the **Return Reasons** section, do the following:
    a. Choose **Add** and select a return reason. Repeat this to define the return reason dropdown for the returns of retail store purchases.
    b. Use the direction arrows to configure the specific display order of return reasons for the customers and customer service representatives.

    Note

    If the return reason dropdown is empty, check if **Settings** > **Setup** > **Return Reasons** has been configured.
11. Choose **Save**.

Parent topic: Returns

Related Information

Configuring Returns of E-commerce Purchases

Configuring Return Routes

Configure your preferences on the return routes, parameters for the AI engine to recommend the best return options, and specific settings for different return routes.

Procedure

1. In the navigation tree, choose **Settings** > **Return Settings**.
2. On the **Return Routes** tab, choose **Edit**.
3. Update these settings according to your business needs and preferences.

   Note

   All the settings impact the customer experience.

   While defining Store Proximity and Machine Learning Confidence Level, keep in mind a few factors such as below:

   - Country or the typical location of the customer, for example, rural or urban.
   - Density of the stores and shipping provider's drop-off locations in the typical location of the customer.

   If the store proximity is set too low, the customer may not receive any return options.

   While defining Send Reminder Email X Days Before Cancelation, make sure to turn on the toggle **Return Reminder** in **Settings** > **Communication** > **Email Notification Triggers**. If this toggle is turned off, reminder emails will not be sent to customers.

4. Choose **Save**.

Parent topic: Return Settings

Related Information

Returns
Selecting the Return Portal Theme
Return Eligibility
Defining Configurable URLs

Selecting the Return Portal Theme

Specify the theme you want to apply to the Return Portal.

Procedure

1. In the navigation tree, choose **Settings** > **Return Settings**.
2. On the **Return Portal** tab, choose **Edit**.
3. Select a theme.
4. Choose **Save**.

   Note

To manage themes, choose **Personalization** > **Theme Designer**. For reference, see Managing Themes.

Parent topic: Return Settings

Related Information

Returns
Configuring Return Routes
Return Eligibility
Defining Configurable URLs

Return Eligibility

Configure the return eligibility policy and and manage return exceptions.

On the **Return Policy** tab, you can define return windows and a list of nonreturnable items. Return windows apply according to their priority, where **General Return Window** defines the general rule for all returns and is the least restrictive of all return windows.

To override the **General Return Window** and define return windows for selected product types, categories, and SKUs, use **Specified Return Window for Selected Types / Categories / SKUs**. The return windows apply in the following order: SKU overrides Category, and Category overrides Type.

To allow the return of items purchased during a specific date range, regardless of any defined return window settings, use **Holiday Return Window**.

To disallow the return of specific product types, product groups, and SKUs, use **Non-Returnable Items**.

For compliance with the EU Consumer Rights Directive, you can enable a notification to inform customers that they can request the return of non-returnable items within 14 days of receiving such items.

i Note

Regardless of any settings defined on the **Return Policy** tab, a customer service representative may override the eligibility rules by manually creating a return order on behalf of the customer.

On the Return Exceptions tab, you can define the following:

- In the **Discount Reason Codes** section, the discount reasons for discounted store transaction items that are not eligible for online returns.
- In the **Nonreturnable Payment Methods** section, the nonreturnable payment methods that disqualify transactions for return initiation.

For more information, see the following topics:

Configuring the Return Policy
Configure the return policy.
Managing the Return Exceptions
Manage the return exceptions.

Parent topic: Return Settings

Related Information

Returns
Configuring Return Routes
Selecting the Return Portal Theme
Defining Configurable URLs

Configuring the Return Policy

Configure the return policy.

Procedure

1. In the navigation tree, choose **Settings** > **Return Settings** > **Return Eligibility**.

2. On the **Return Eligibility** tab, select **Return Policy**.

3. Choose **Edit**, and do the following:

    - In the **General Return Window** section, set the following parameters:

Field	Description
Status	Specifies whether this section is enabled. This section is always enabled.
Return Window	Specifies the number of days within which the customer can return their purchases. Range: 1 to 999 days.
Starting Point	Specifies when the return window starts.

    - In the **Specified Return Window for Selected Types / Categories / SKUs** section, do the following if you want to define return windows for selected categories or SKUs:

        a. Turn the **Status** toggle on.

        b. In **Return Window (Type)**, **Return Window (Category)** or **Return Window (SKU)**, choose **Add**.

        c. In the **Return Window** field, enter any number of days from 1 to 999.

        d. Add types, categories or SKUs using the **Product Categories** or **SKU** dialog that opens by choosing the icon at the right end of the **Selected Types**, **Selected Categories**, or **Selected SKUs** field. Alternatively, use **Import**.

    - In the **Nonreturnable Items** section, do the following if you want to define the items that cannot be returned.

        a. Turn the **Status** toggle on.

        b. Add categories or SKUs using the **Product Types**, **Product Categories**, or **SKU** dialog that opens by choosing the icon at the right end of the **Nonreturnable Types**, **Nonreturnable Product Groups**, or **Nonreturnable SKUs** field. Alternatively, use **Import**.

    - In the Holiday Return Window section, set the following parameters:

Field	Description
Status	Specifies whether this section is enabled.
Purchase Period	Specifies the start and end dates for a holiday season.
Return Window Setting	Specifies the last day to return, or defines the return window as a number of days from the sales order fulfillment or purchase date:

4. Choose **Save**.

Parent topic: Return Eligibility

Related Information

Managing the Return Exceptions

Managing the Return Exceptions

Manage the return exceptions.

Procedure

1. In the navigation tree, choose **Settings** > **Return Settings** > **Return Exceptions**.
2. On the **Return Exceptions** tab, choose **Edit**.
3. Add, edit, or delete information for discount reason codes or nonreturnable payment methods. Note the character limit of 100 characters for all fields.

Section	Field	Instruction
Discount Reason Codes	Code	Enter an alphanumeric value for the discount reason code.
	Description	Enter a description of the discount reason code.
	Message to Customer	Enter the message to be shown for items not eligible for online returns. This text can be viewed in Return Portal by customers and in the Back Office by customer service representatives.
Nonreturnable Payment Methods **Note** In the default row about multiple payment methods, you can modify only the fields **Message Title** and **Message to Customer**.	Code	Enter an alphanumeric value for the nonreturnable payment method code.
	Description	Enter a description of the nonreturnable payment method.
	Message Title	Enter the title of the message to be shown for transactions excluded from return initiation. This text can be viewed in Return Portal by customers.

Section	Field	Instruction
	Message to Customer	Enter the body of the message to be shown for transactions excluded from return initiation. This text can be viewed in Return Portal by customers.

4. Choose **Save**.

Parent topic: Return Eligibility

Related Information

Configuring the Return Policy

Defining Configurable URLs

Define URLs to enable the customer to access the retailer's existing pages.

On **Configurable URL**s tab, you can configure the following URLs to direct the customer to the retailer's existing sources of information:

- Data Privacy Statement. When the customer opens Return Portal, this URL is shown in the footer, enabling the customer to go to the retailer's existing page with the data privacy statement.
- General Terms and Conditions. When the customer opens Return Portal, this URL is shown in the footer, enabling the customer to go to the retailer's existing page with the general terms and conditions.
- Return Policy. When an item is not eligible for return, as defined in the return eligibility rules, this URL is shown, enabling the customer to go to the retailer's existing page with the return policy.
- Customer Service Page. This URL shown as ‘Contact Us’ link on Return Portal and in the notification email footer enables the customer to open the Customer Service contact page.
- Email Navigation. In a return-tracking email, this URL enables the customer to go to the retailer’s custom page to check the status of return. If it’s not configured, the standard link (set in **Customer Service Web Page** on the **Setup** > **Company Profile**) is shown.
- Webshop. When store credit is offered to the customer as a refund method, the URL is shown, enabling the customer to go to the retailer's webshop.

Procedure

1. In the navigation tree, choose **Settings** > **Return Settings** > **Configurable URLs**.
2. On the **Configurable URLs** tab, choose **Edit**.
3. Update the URL values.
4. Choose **Save**.

Parent topic: Return Settings

Related Information

Returns

Configuring Return Routes

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Return Eligibility