

## CHAPTER 23 - RETURNS PROCESS.....2

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## **CHAPTER 23 - RETURNS PROCESS**

This feature allows product to be returned and referenced to a specific order if necessary. Returns can be completed in one of two ways, RF or CRT. The RF has two options for processing a return. First, there is Bulk Returns. Once the bulk plate has been received, the individual or detailed receiving is completed. Second, is the Detailed Returns on the RF. The RF user has the ability to go directly to the detail receiving without using the bulk returns. The whole return process can be done using both the RF and the CRT or just the RF system.

In this chapter the following information will be covered:

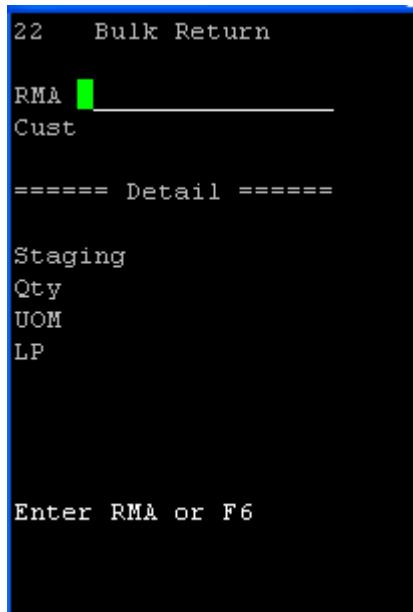
- ✓ Bulk Returns on the RF
- ✓ Detailed Returns on the CRT
- ✓ Detailed Returns on the RF
- ✓ Build Rtn MP on the RF
- ✓ Close Rtn MP on the RF

## Bulk Returns on the RF

The first step to creating a bulk return in SYNAPSE is to receive a bulk group of items. These do not need to be from the same order because they will eventually be attached to an original order.

- From the Main Menu, select Returns (option 20).
- In the Returns Menu, select Bulk Returns (option 22).

The Bulk Return screen will display as follows:



```
22 Bulk Return
RMA █
Cust
==== Detail =====
Staging
Qty
UOM
LP
Enter RMA or F6
```

- If an RMA number is required for this customer, type the number in the RMA field.
- Press the Tab key to move to the Cust field and enter the Customer ID
  - The system will prompt the user to ok it if this is a new RMA number.
- Type the staging location in the Staging field.
- Press the Tab key to move to the Qty field and enter the total quantity of all the items that are on this license plate.

**NOTE:** Remember: All items on a Bulk Returns License Plate do NOT have to be from the same original order!

- Press the Tab key to move to the UOM field. Enter the UOM for the items. Unless the whole license plate has the same item on it, the UOM should be EA for Eaches.
- Press the Enter key.
- The system will ask the user if he/she would like to enter the LP. Type a 'Y' for Yes and press Enter.
- Type or scan the Master License Plate number in the LP field, then press Enter.
- If there is more than one LP to be entered, continue entering them using the same process.
- When finished, press F1 to return to the Main Menu.

## Detailed Returns on the CRT

This section will cover the detail receiving of a new return and the detail receiving of a Bulk return.

- From the Edit menu, select Returns.

The Return Order screen will display as follows:

**Return Order 370298-1 for Customer 1CALJAM**

Order Info Summary Comments\* Returned By

Order ID: 370298 Ship ID: 1 Type: Q Returns Customer ID: 1CALJAM Cust PO: Exception

To Facility: ZET Appointment Date/Time: RMA: 123 Bill of Lading: Partial Return


Status: A Arrived Status by: Status Update: Priority: Returned From:


Orig Order ID: Ship ID: Bulk Order ID: Ship ID: Return Tracking Number: Reference:

Return Complete Cancel Short Over Hazardous Cancelled View Plates

Item	Lot #	Order Qty	UOM	Rcvd. Qty	Ship Qty	Entered UOM	Entered Qty	Entered Item	Status	Variance	Variance	Returned Qty	Hazardous?

LINUX2TEST Facility ZET (Last Update by TRF3 at 10/23/2013 01:03 PM)

- If a Bulk return has been started on the RF, the user can use the lookup button  to locate that return.

- Click on the Add button . The system will prompt the user to select a Bulk License Plate.

The Enter Bulk Returns Plate window will display as follows:



The dialog box titled "Enter Returns Bulk Plate" has a blue header bar with a red close button. It contains a label "Bulk Return Plate:" above a text input field. To the right of the input field is a small icon of a hand pointing to a document. At the bottom are two buttons: "OK" and "Cancel".

- Type the Master License Plate that was added on the Bulk Return screen on the RF.
  - If the LP is not known, double click in the Bulk Return Plate field to view a complete listing of Return Plates. Select the correct plate from the list and double click on it to carry it over to the Returns screen.
  - If a Bulk Return Plate is not being used, the user can close this screen.

The Original Order Lookup will display:



The "Return Original Order Lookup" screen has a blue header bar. It contains several input fields with dropdown arrows: Customer ID, Facility, Ship To, Reference, Order ID, Tracking Number, Serial Number, License Plate, Ship To Name, and Ship To Postal Code. There are also checkboxes next to each field. On the right, there is a "Hazardous Cancelled" button and a section for "Order Count" and "Weight Entered - Lbs." and "Quantity Ordered" and "Weight Entered - Kgs.". At the bottom is a table with columns: Order ID, Ship ID, Order Status, Customer, Order Type, Qty. Ordered, Qty. Received, Qty. Shipped, Appointment, Ship, Customer PO, RMA #, and From.


Order ID	Ship ID	Order Status	Customer	Order Type	Qty. Ordered	Qty. Received	Qty. Shipped	Appointment	Ship	Customer PO	RMA #	From

- If there is an original order that this item is being returned from, lookup the order on this screen. If the original order is not known, the user can close this screen without selecting an order.
- Double click on the Order Number to carry it over to the Returns screen.

- A search can also be performed in the other fields. The Ship To Name field supports wildcards in the format %search\_value%. Additionally, a search field for Ship To Zip was added. This field will allow searching for zip codes on orders either with preconfigured consignees or one-time ship to's.

The Returns screen will display as follows:

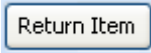
Item	Lot #	Order Qty.	UOM	Rcvd. Qty.	Ship Qty.	Entered UOM	Entered Qty.	Entered Item	Status	Variance	Variance	Returned Qty.	Hazardous?
1001		20	Each		20	Each	20	1001	Active	-20		0	N
1003		2	Case		2	Case	2	1003	Active	-2		0	N

- Press the Tab key to move to the RMA field. If an RMA number is required for this customer, type the number in the RMA field.
- Press the Tab key to move to the Returned From field. Double click in this field to view a list of Consignees for this customer.
- Select the correct Consignee and double click on it to carry it over to the Returns screen.
- The checkbox labeled "Exception" under the Reference field and the box labeled "Partial Return" are informational only with no functionality tied to them.
- Click the check mark  to save this information.
- Click on the Return An Item tab in the middle of the screen

Original Order Return Order Return Items Return An Item


The Return An Item tab will display as follows:

- In the Item field, type the Item ID for the item that will be returned.
  - ❑ If the Item ID is not known, double click in this field to view a complete listing of items for this customer. Double click on the correct item to carry it over to the Returns screen. The cursor will automatically move to the Quantity field.
- Type the quantity of this specific item that is being returned.
- Press the Tab key to move to the Unit Of Measure field. Click on the down arrow to view a listing of UOM's for this item. Select the correct UOM.
- Press the Tab key to move to the LPID field. Enter the 15 digit License Plate Number that will be used specifically for this item.
  - ❑ This is not the Bulk LP that was entered on the RF but a unique LP number for this returned item.
- Press the Tab key to move to the Master LPID field. If needed, type the 15 digit Master License Plate Number that this item will be put on.
- Press the Tab key to move to the Return Reason field.
- Click on the down arrow to view a listing of reason codes. Select the correct reason code and click on it to carry it over to the Returns screen.
- Press the Tab key to move to the Inventory Status field. Click on the down arrow to view a listing of Inventory Status'. Select the correct Inventory Status and click on it to carry it over to the Returns screen.
- Press the Tab key to move to the Inventory Class field. Click on the down arrow to view a listing of Inventory Classes. Select the correct Inventory Class and click on it to carry it over to the Returns screen.

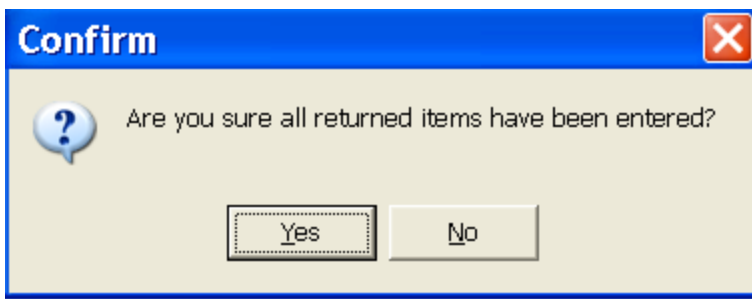
- If the Lot Number or Serial Number is required for this item click in those fields and type in the correct information.
- Click in the Location field. Type the location this item will be stored in.
- Click the Return Item button  to save this item to the Returns Order.

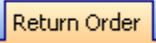
The system will prompt with a message window:



- Click 'Yes' in this window.
- Continue this process adding each item that has been returned from this original order.
- Once all items have been entered, click on the Return Complete button  to finish this return order.

The system will prompt with a message window:



- If all returned items have been entered, click the 'Yes' button.
- The completed return order can be viewed by clicking on the Return Order Tab  in the middle of the screen.



## Default Return Quantity

On the Customer Maintenance screen, Receiving tab, Returns subtab a numeric field labeled “Default Return Quantity” was added. If this field is left unpopulated, returns will be received as they currently are on the Edit Returns screen. If, however, a value is entered in the field, the Quantity field on the Return an Item tab of the Edit Returns screen will be pre-populated with the quantity configured during receiving after an item is selected. The cursor will be positioned in the next field following quantity per the usual tab order of the screen after this occurs.

Synapse 2 - [Customer INA Barefoot Contessa]

File Edit Lookup Requests Setup Window Utilities Billing Help

Name Receiving Shipping Billing Dictionary Labeling Facility Settings Trading Partners

Options Options 2 Confirmation Instructions Returns ABC Cycle Suppliers Facility Returns Disposition Overage Inventory Status Change

☐ RMA Required for Returns ☐ Original Order Required Disposition:  Default Return Quantity:

☐ Ignore Anniversary Date When Consolidating Returns Merchandise

Returns Reason Codes

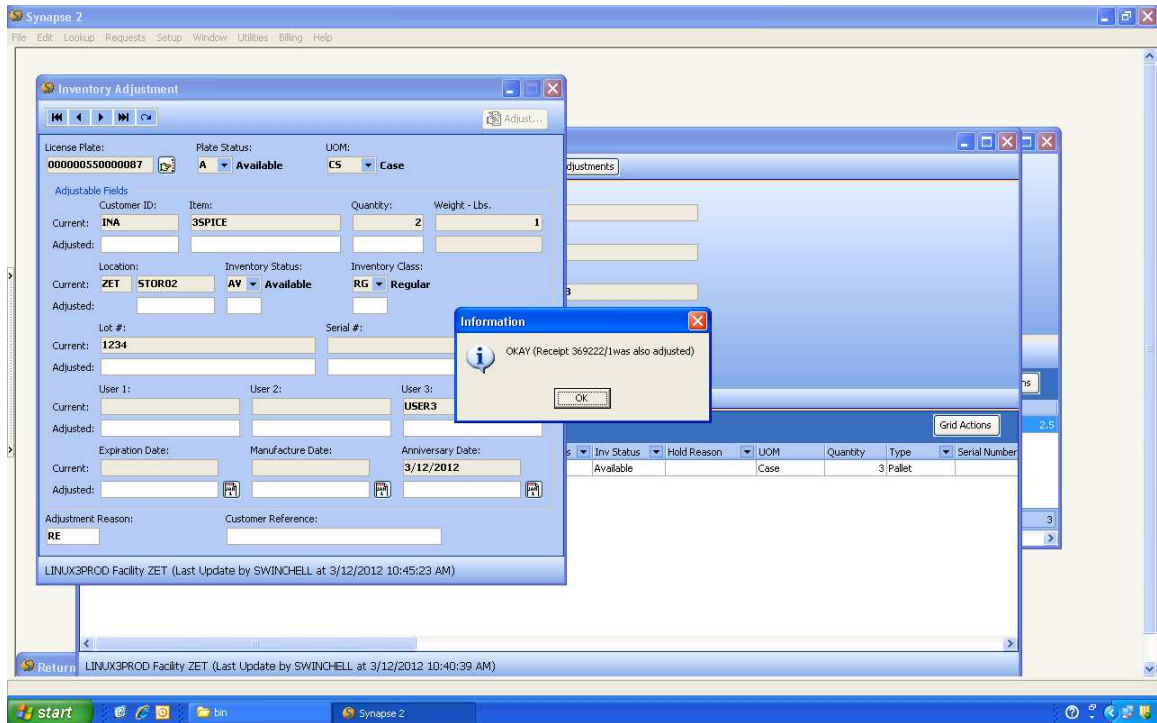
Code	Description	Abbreviation	Last User	Last Update
02	Per CSR	CSR	SWINCHELL	3/12/2012 09:54 AM
01	exchanged	EXCHANGE	SWINCHELL	4/18/2011 04:43 PM

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start Synapse 2

## View Plates Option

On the Return Items of the Edit Returns screen, drill down capability was added to the grid via the View Plates button. Double clicking a license plate listed there will open the License Plate. Information screen for the plate on which the user clicked. Provided the user has permissions to do so, the user can make adjustments to the plate as necessary. Adjustments made in this manner to plates associated with returns orders in **ARRIVED** status will result in updates to the returns order in a manner similar the updates made to normal receipts when LP's are adjusted while their corresponding receipt is still open.



## Closing Returns on the Multi-Order Editor

On the Multi-Order Editor screen, a button labeled “Complete Returns” was added next to the existing Release from Hold button. This button will only be illuminated and clickable when the user has selected some number of orders in the results grid and all of those orders are returns orders on **ARRIVED** status. If this criteria is met and the user has Edit permissions to the Edit Returns screen, the button will illuminate when the selections are made and the user may click the button to complete the returns. Prior to the completion occurring, a dialogue will open with the message “Complete selected returns orders?” The user may click “Yes” to complete the returns orders or “No” to cancel the action.

**Synapse 2 - [Multi-Order Editor]**

File Edit Lookup Requests Setup Window Utilities Billing Yard Help

Facility: **ZET** Order Type: **Q** Appointment Date: **until** PO: **(>=)** (**=** or **Like**) Reference: **(>=)** (**=** or **Like**)

Customer: **BP** Order Status: **A** PO Through: Reference Through:

Load: Wave: Ship To: Ordered Lot Number: Ordered Weight: From thru

Carrier: Bill To: Ship Terms: Ship Type: ☐ One Time Ship To

Total Orders: **2**

**Updatable Information**

Carrier: Delivery Service: ☐

Ship Type: Ship Terms:

Ship To: Bill To:

Ship Date: Cancel Date:

Stage Location: Appt Date:

Pass-Thru Fields

☐ Apply Pass-Thru changes to load.

One Time Ship To

Set Comments

Drag a column header here to group by that column

Selected	Order ID	Ship ID	Cust ID	Order Type	Ship Terms	Order Status	Qty Ordered	Weight Order
<input checked="" type="checkbox"/>	368419	1 BP	BP	Returns		Arrived	0	
<input checked="" type="checkbox"/>	368538	1 BP	BP	Returns		Arrived	0	

Apply Changes Cancel Assign to Load Remove from Load Release from Hold Complete Returns

**Synapse 2 - [Multi-Order Editor]**

File Edit Lookup Requests Setup Window Utilities Billing Yard Help

Facility: **ZET** Order Type: **Q** Appointment Date: **until** PO: **(>=)** (**=** or **Like**) Reference: **(>=)** (**=** or **Like**)

Customer: **BP** Order Status: **A** PO Through: Reference Through:

Load: Wave: Ship To: Ordered Lot Number: Ordered Weight: From thru

Carrier: Bill To: Ship Terms: Ship Type: ☐ One Time Ship To

Total Orders: **2**

**Updatable Information**

Carrier: Delivery Service: ☐

Ship Type: Ship Terms:

Ship To: Bill To:

Ship Date: Cancel Date:

Stage Location: Appt Date:

Pass-Thru Fields

☐ Apply Pass-Thru changes to load.

One Time Ship To

Set Comments

Drag a column header here to group by that column

Selected	Order ID	Ship ID	Cust ID	Order Type	Ship Terms	Order Status	Qty Ordered	Weight Ordered	Qty Shipped	Qty Received	PO #
<input checked="" type="checkbox"/>	368419	1 BP	BP	Returns		Arrived	0	0	0	0	1 TEST
<input checked="" type="checkbox"/>	368538	1 BP	BP	Returns		Arrived	0	0	0	0	1

**Confirm**

Complete selected returns orders?

Yes No

**Synapse 2 - [Multi-Order Editor]**

File Edit Lookup Requests Setup Window Utilities Billing Yard Help

Facility: ZET Order Type: Q Appointment Date: PO: (>=) (= or Like) Reference: (>=) (= or Like)

Customer: BP Order Status: A until PO Through: Reference Through:

Load: Wave: Ship To: Ordered Lot Number: Ordered Weight: From thru

Carrier: Bill To: Ship Terms: Ship Type: ☐ One Time Ship To

**Updatable Information**

Carrier: Delivery Service: ☐

Ship Type: Ship Terms:

Ship To: Bill To:

Ship Date: Cancel Date:

Stage Location: Appt Date:

Pass-Thru Fields

☐ Apply Pass-Thru changes to load.

Drag a column header here to group by that column

Selected	Order ID	Ship ID	Cust ID	Order Type	Ship Terms	Order Status	Qty Ordered	Weigh
<No data to display>								

**Information**

Complete returns orders done.  
All 2 returns orders completed successfully

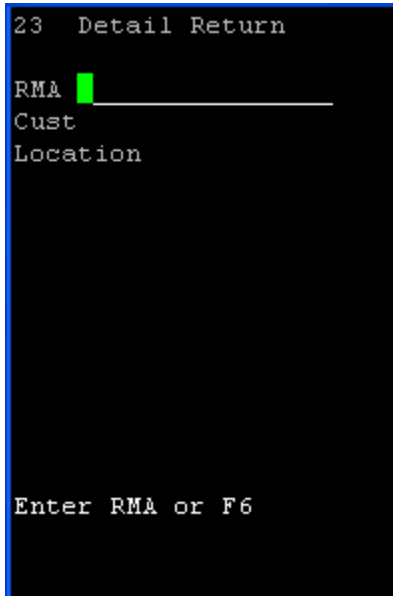
OK

## Detailed Returns on the RF

Detailed Returns can also be done using the RF. A Return Order Header must first be created.

- From the Main Menu, select Returns (Option 20).
- From the Returns Menu, select Detail Returns (Option 23).

The Detail Returns screen will display as follows:



```
23  Detail Return

RMA █
Cust
Location

Enter RMA or F6
```

- If an RMA is required for this customer, type it in the RMA field.
- Press the Tab key to move to the Cust field. Enter the Customer ID in the Cust field.
- Press the Tab key to move to the Location field. Enter the Location ID in the Location field.
- Press the Enter key.
- The system will prompt the user to add the new RMA number, type a 'Y' for yes and press the Enter key.

The screen will display as follows:

```
23  Detail Return
RMA 234
Cust 1CALJAM
Itm █
Cls      Sts      Rsn
Qty      UOM

Enter item
```

- In the Itm field, type the Item ID for the first item to be returned on this RMA.
- Press the Enter key.
  - The system will prompt the user to add the new item. Type a 'Y' for yes and press the Enter key.
- Press the Tab key to move to the Cls field. Enter the Inventory Class for this item.
  - If the Inventory Class Codes are not known, type a '?' in this field and press the Enter key to view a complete listing. To select a code from the list, type any character (alpha or numeric) to the left of the code and press the Enter key. This will carry it over to the Returns screen.
- Press the Tab key to move to the Sts field. Enter the Inventory Status for this item.
  - If the Inventory Status Codes are not known, type a '?' in this field and press the Enter key to view a complete listing. To select a code from the list, type any character (alpha or numeric) to the left of the code and press the Enter key. This will carry it over to the Returns screen.
- Press the Tab key to move to the Rsn field. Enter the Reason Code for the return.
  - If the Reason Codes are not known, type a '?' in this field and press the Enter key to view a complete listing. To select a code from the

list, type any character (alpha or numeric) to the left of the code and press the Enter key. This will carry it over to the Returns screen.

- Press the Tab key to move to the Qty field. Enter the Quantity of the item that is being returned.
- Press the Tab key to move to the UOM field. Enter the UOM for this item.
  - If the UOM Codes are not known, type a '?' in this field and press the Enter key to view a complete listing. To select a code from the list, type any character (alpha or numeric) to the left of the code and press the Enter key. This will carry it over to the Returns screen.

**NOTE:** If the Manufacturing Date, Expiration Date, or Serial Number is required for this item, the system will prompt the user to fill this information in at this time.

- Press the Tab key to move to the LP field. Enter or scan the License Plate number for this item.
- Press the Enter key to complete this item.
- Continue this process until every item has been entered for this RMA.
- When finished entering all items, press F4 to finish.
- The system will briefly display that putaway is pending and a task will be generated. If the users profile is set to Operating Mode of 'S', the user will be directed to do a putaway for the items returned.
- Press the Enter key.

The System Directed Putaway screen will display as follows:



```
01 System Directed
   Putaway In
CALIFORNIA DISTRIBUT
LP 102313000000805
Itm 1010
Qty 20      UOM CS
Location STOR74

===== Verify =====
Location STOR74
Vrfy Loc     
Qty

Verify or F6
```

- In the Location field, type or scan the Location this item will be putaway in.
- Press the Tab key to move to the Check ID field. Enter the Check ID for the location (if applicable to the facility).
- Press the Tab key to move to the Qty field. Enter the quantity of this item to be putaway.
  - This number should match the Qty located above the Verify line.
- Press the Enter key.
- Continue this process until all items have been putaway.
- Once all items have been putaway, the system will prompt 'Done. More?' Type an 'N' for No and press the Enter key.
- After the LP's have been putaway, the system may prompt the user to 'Purge Returns?', this is to get rid of the bulk plates from Bulk Returns. If this message comes up, type a 'Y' for Yes and press the Enter key.
- The system will then list all of the bulk plates to be purged. Type an 'X' next to the plate and press the Enter key to purge.
- Press F1 to return to the Main Menu.

Once all of the items have been received, the Return must be closed from the CRT.

- From the Edit menu, select Returns. The system will default to the last Return entered. If this is the Return to close, continue to the next step, if it is not, lookup the Return number by using the lookup button.

Once the Return is located and all information has been verified, click on the Return Complete button to close.

## RF Option 25 – Build Rtn MP

The Build Rtn MP function was designed to allow the creation of multi pallets to be later shipped on a Return to Vendor type order. There are a few options that must be setup before this screen can be used.

### Setup/Customer Maintenance

From the Receiving/Facility Returns Disposition tab, a Disposition and Sortation Location must be identified. Further information on this is available in the Concepts Manual.

The screenshot shows the 'Customer 1CALJAM-California Distribution' window with the 'Facility Returns Disposition' tab selected. The 'Facility' dropdown is set to 'ZET', 'Disposition' is 'SCRAP', and 'Sortation Location' is 'AUDIT01'. Below this is a table with the following data:

Facility	Disposition	Sortation Location	Last User	Last Update
ZET	SCRAP	AUDIT01	JSTANCYK	10/23/2013 6:19:39 PM

At the bottom, it says 'LINUX2TEST Facility ZET (Last Update by JSTANCYK at 10/23/2013 3:49:46 PM)'.

From the Facility Settings Tab, a Returns Location must be identified. Further information on this is available in the Concepts Manual.

The screenshot shows the 'Customer 1CALJAM-California Distribution' window with the 'Facility Settings' tab selected. The 'Facility' dropdown is set to 'ZET'. The 'Allocation Rule' is 'CALJAM'. The 'Returns Location' is 'STG20'. The 'Wave Profile' and 'Packlist Printer' are empty. The 'Replenishment Allocation Rule' is empty. The 'Putaway Profile' is 'CALJAM'. The 'Freight Billing' section has 'Tariff' and 'Discount' dropdowns. The 'COD' and 'Fuel Surcharge' dropdowns are also present. At the bottom, it says 'LINUX2TEST Facility ZET (Last Update by JSTANCYK at 10/23/2013 3:49:46 PM)'.

## Setup/Item Maintenance

From the Receiving/Options 2 tab, a Returns Disposition must be identified for each item. Further information on this field is available in the Concepts Manual.

**Customer 1CALJAM - Item Maintenance for 1001**

Item Specs | Aliases | Storage | Substitutes | Pick Fronts | Facility Settings | Customer...

Name | UOM | Specs | **Receiving** | Shipping | Labeling | Hazardous | Handling

Options - 1 | Options - 2 | Instructions | Format Validation

Do NOT allow receipt of damaged product:  
☐ Yes ☐ No ☒ Use Default Customer Default: No

Default Receiving Status:  
 Available

Putaway Confirmation Method:  
 Cust Default Customer Default: I - Loc,Item,Qty

Single-Quantity License Plates:  
☐ Yes ☐ No ☒ Use Default Customer Default: No

Entry Field Parsing:  
 Rule: Parse Rule Action:  
☐ Yes ☐ No ☐ Use Default Customer Default: No

Entry Field:  
 None

Returns Disposition:  
 SCRAP

Putaway Highest Whole UOM:  
☐ Yes ☐ No ☐ Default: N

LP Creation Controls:  
☐ Disallow mixing with other items  
☐ Disallow overbuilt LPs  
☐ Warn on LP's less than

LINUX2TEST Facility ZET (Last Update by JSTANCYK at 10/23/2013 6:22:07 PM)

- Process the Detail Returns via CRT. This will allow an RF user to access the LP's received.
- From the RF Main Menu, select Returns Menu – Option 20. Or you can go directly to Option 25 – Build Rtn MP.

```
25  Build Rtn MP

LP 1023130000000801
Customer 1CALJAM
Location STG20

===== Take To =====

Location AUDIT01

===== Add To =====

LP █ _____

Enter Multi LP
```

- Scan or type the LP. This LP must be in the Returns defined location.
- Scan or type the 'Add To' LP. The LP can be an already existing MP or a new LP. This will combine the two LP's into a multi pallet. If you are starting a new LP, the system will display the following message.

```
25  Build Rtn MP

LP 1023130000000801
Customer 1CALJAM
Location STG20

===== Take To =====

Location AUDIT01

===== Add To =====

LP 1023130000000810

New Multi LP? █
```

- Enter 'Y' if this is a new LP.
- Repeat this for each LP to be combined.

```
25  Build Rtn MP

LP 102313000000801
Customer 1CALJAM
Location STG20

===== Take To =====

Location AUDIT01

===== Add To =====

LP 102313000000810

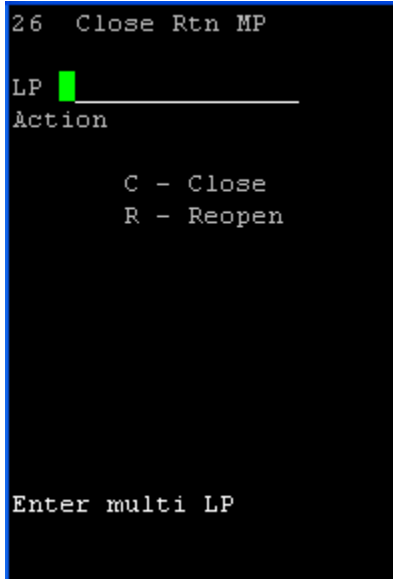
Done. More? █
```

- When done enter 'N'.

## RF Option 26 – Close Rtn MP

The Close Rtn Mp function was designed to 'close' the multi pallet that was built during option 25 – Build Rtn MP. This screen also allows a closed multi pallet to be reopened. The system only allows one multi pallet per location during these processes.

- From the RF Main Menu, select the Returns Menu-Option 20
- From the Returns Menu, select the Close Rtn MP-Option 26



- Scan or Type the LP of the multi pallet.
- Select the action to be taken 'Close' or 'Reopen'.

**\*\*NOTE:** When using the combine Plate option (RF option 82), all child plates must have the same:

- customer
- item,
- lotnumber,
- inventory status,
- inventory class,
- manufacture date,
- expiration date,
- anniversary date
- country of origin,
- user item 1,
- user item 2,
- user item 3

For customers doing returns and not using the Anniversary Date as a billing method, the system does allow the combine function for child plates with different anniversary date. To activate this feature for a customer, Check the "Ignore Anniversary Date When Consolidating Returns Merchandise" located on the Seup/Customer/Receiving/Returns tab. The new consolidated plate will reflect newest date as the anniversary date.

Name	Receiving	Shipping	Billing	Dictionary	Labeling	Facility Settings	Trading Partners		
Options	Options 2	Confirmation	Instructions	Returns	ABC Cycle	Suppliers	Facility Returns Disposition	Overage	Inventory Status Change

☐ RMA Required for Returns  
 ☒ Original Order Required  
 Disposition:  

☒ Ignore Anniversary Date When Consolidating Returns Merchandise

Returns Reason Codes

Code	Description	Abbreviation	Last User	Last Update
▶ 10	Damaged	10	SWINCHELL	8/24/2010 5:19:22 PM

PROD Facility ZET (Last Update by SWINCHELL at 8/24/2010 5:18:12 PM)

