

# SALES RETURNS STEP BY STEP

- Enter Return
- Receive Return
- Print Returned Item
- Refund Customer – Note: AR is often responsible to Refund the Customer

## SALES RETURN—WITH INVOICE

To Access: **Sales** module: select the **Sales Return** menu option.

1. Complete the New Sales Return form and click **Continue**. When the popup appears asking if you are sure you do not want to schedule a pick-up click **OK**.
2. Complete the Edit Sales Return form (enter restocking fees) and click **Save & Continue**.
3. To add Items to the return:
  - From the Sales Return - Items page, click the **Add link** of the item being returned.
  - Complete the Return Item Qty form and click **Save**. Repeat step as needed.
4. Once all items have been added to the return, from the Sales Return Items page, the user has the option to:
  - Receive: Click on the Receive button. Items will be brought into stock and return will need to get refunded. Print the Returned Items pdf and place with material.
  - Exit: Return will remain in a WIP status and can still be canceled by user.
5. Refund the Customer. Depending on company policy, someone from AR may be responsible to Refund the customer. See steps at the end of the document to Refund Customer.

## SALES RETURN—W/OUT INVOICE

To Access: **Sales** module: select the **Sales Return** menu option.

1. Complete the New Sales Return form, make sure to select the No Invoice Return checkbox, and click **Continue**. When the popup appears asking if you are sure you do not want to schedule a pick-up click **OK**.
2. Complete the Edit Sales Return form (enter restocking fees) and click **Save & Continue**.
3. To add Items to the return:
  - From the Sales Return - Items page, click the **Add New** button.
  - Search for Item
  - Complete the Return Item Qty form and click **Save**. Repeat step as needed.

4. Once all items have been added to the return, from the Sales Return Items page, the user has the option to:
  - **Receive:** Click on the **Receive** button. Items will be brought into stock and return will need to get refunded. Print the Returned Items pdf and place with material.
  - **Exit:** Return will remain in a WIP status and can still be canceled by user.
5. **Refund the Customer.** Depending on company policy, someone from AR may be responsible to Refund the customer. See steps at the end of the document to Refund Customer.

## RETURN—PICKUP REQUIRED

To Access: **Sales** module: select the **Sales Return** menu option.

1. Complete the New Sales Return form, make sure to select the Require Pickup checkbox, and click **Continue**. When the popup appears asking if you are sure you do not want to schedule a pick-up click **OK**.
2. Complete the Edit Sales Return form (enter restocking fees & select pickup address) and click **Save & Continue**.
3. To add Items to the return:
  - From the Sales Return - Items page, click the **Add link** of the item being returned.
  - Complete the Return Item Qty form and click **Save**. Repeat step as needed.
4. Once all items have been added to the return click the **Schedule Pickup** button.

## RECEIVE SHIPMENT

Item is back at the WH (Trip scheduled to pick-up item has returned and the trip's status = CLOSED)

5. From the New Sales Return form click the **Back to Lookup** button. Complete the Sales Return Lookup form and click **Lookup**.
6. Select the **Edit** option from the return's popup menu.
7. Make any necessary changes to the Edit Return form and click **Save & Continue**.
8. From the Sales Return Items page you must:
  - Click the **Edit link** of the item returned.
  - Enter the Received Qty and click **Save**. Repeat step as needed.
9. Click the **Receive** button from the Sales Return Items page.
10. Print the Returned Items pdf and place with material.

To Access: **Sales** module: select the **Sales Return** menu option.

1. From the New Sales Return form click the **Back to Lookup** button.
2. Complete the Sales Return Lookup form and click **Lookup**.
3. Select the **Refund** option from the return's popup menu (Return status must = Received).
4. Complete the Sales Return Refund form and click **Submit**.