



## **Case Returns Plugin**

At the moment the procedure for a customer return is to create an RMA, email it to the customer, the customer returns the goods with the RMA number on it, then we decide to fix the items and send back (so cancel the RMA) or credit the item putting them into good or defective stock.

We may send the customer a new item(s) by raising a sales order, shipping out in the normal way and invoicing them. So the credit note balances with the invoice when the goods are returned. If you do an advanced replacement then there is an outstanding invoice if they don't return the goods.

The above allows for replacements, advanced replacement, getting the stock back as good or defective. You could also use Cases to log the problem to see if you can solve the problem over the phone first, use that as an RMA number and then only create an RMA or Credit as required.

This plugin allows for more detailed scenarios around returned goods.

## **Proposed Procedure using "Case Returns" plugin**

### **Log a Case for the customer wanting to return goods or has a problem with an item.**

- This allows us the chance to solve the problem over the phone and complete the case.
- This allows us to log all the calls from a customer so we can see how heavy on support they are, who has a lot of returns and for what reason.
- This allows us to set an SLA (Service Level Agreement – Expected Resolve Date Time) so we can see all outstanding cases and how old or overdue they are, using normal case management.
- This allows us to print or email a case return layout for the return of the items that the customer would display on the goods coming back. (this is instead of using the normal RMA)



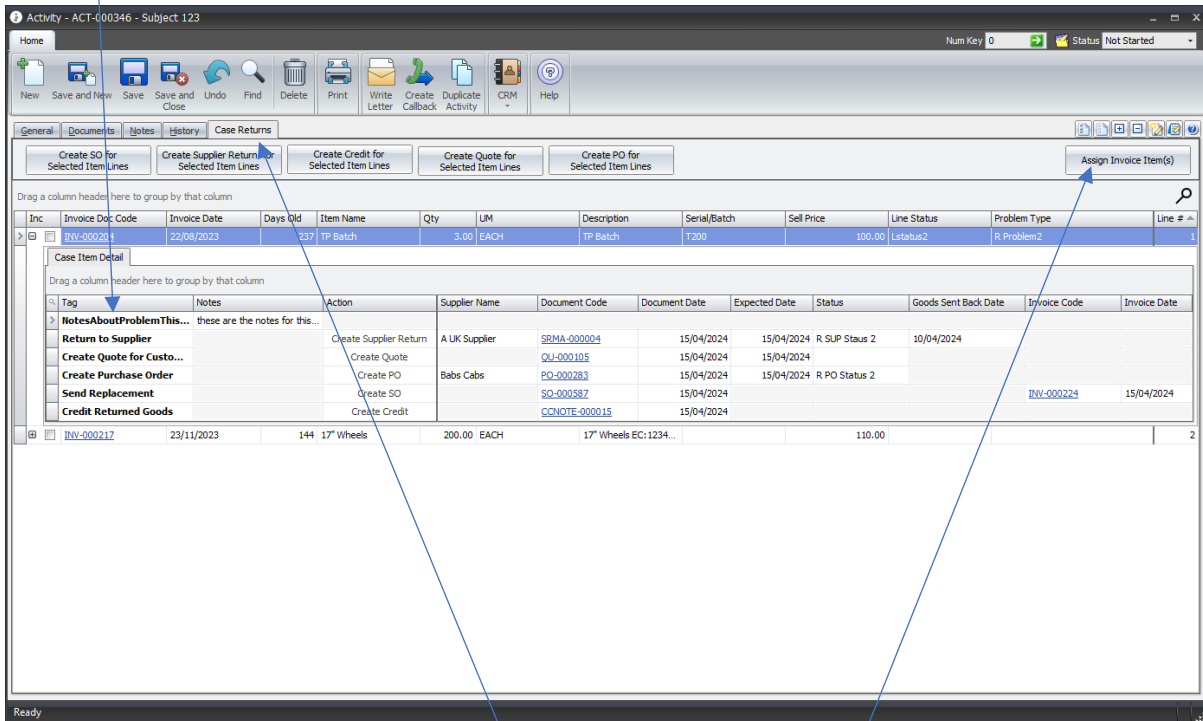
## When the goods come back we match them to a case.

- so outstanding cases are our outstanding returns.
- this allows us to try and fix repair items and send them back to the customer
- for items that can't be fixed or repaired by our own workshop then we have the following options:

1. Return to Supplier for Warranty Repair, Replacement or Out of Warranty Quote Repair
2. Create a Quote for repair or replacement for Customer if chargeable
3. Create a PO to supplier for item if we don't have in stock.
4. Create SO to send out advanced replacement or replacement after received.
5. Create Credit to put them back into stock as good or defective when returned.

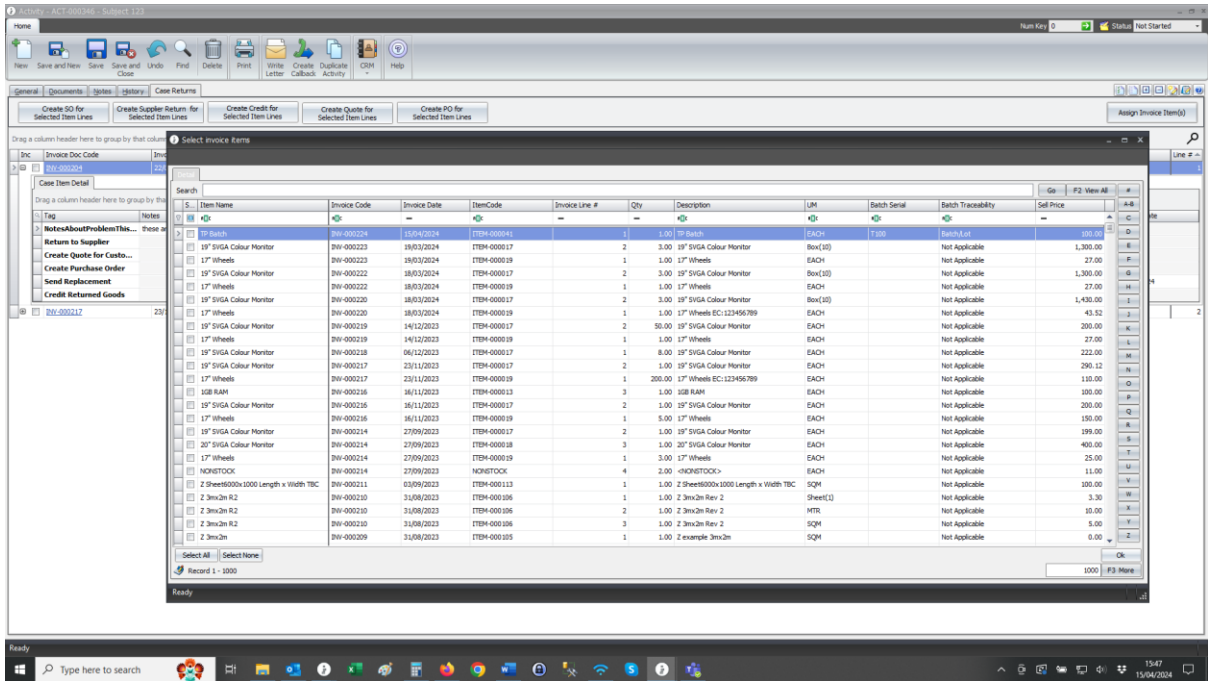
A case could be for 1 item or multiple items. The detail and workflow is by item line to allow for this. i.e. each item line has a status and the above options within a case. Some items maybe repairable, some need to go back to supplier etc. You could of course just have 1 case for 1 item problem to keep it simple.

## Case Form Changes



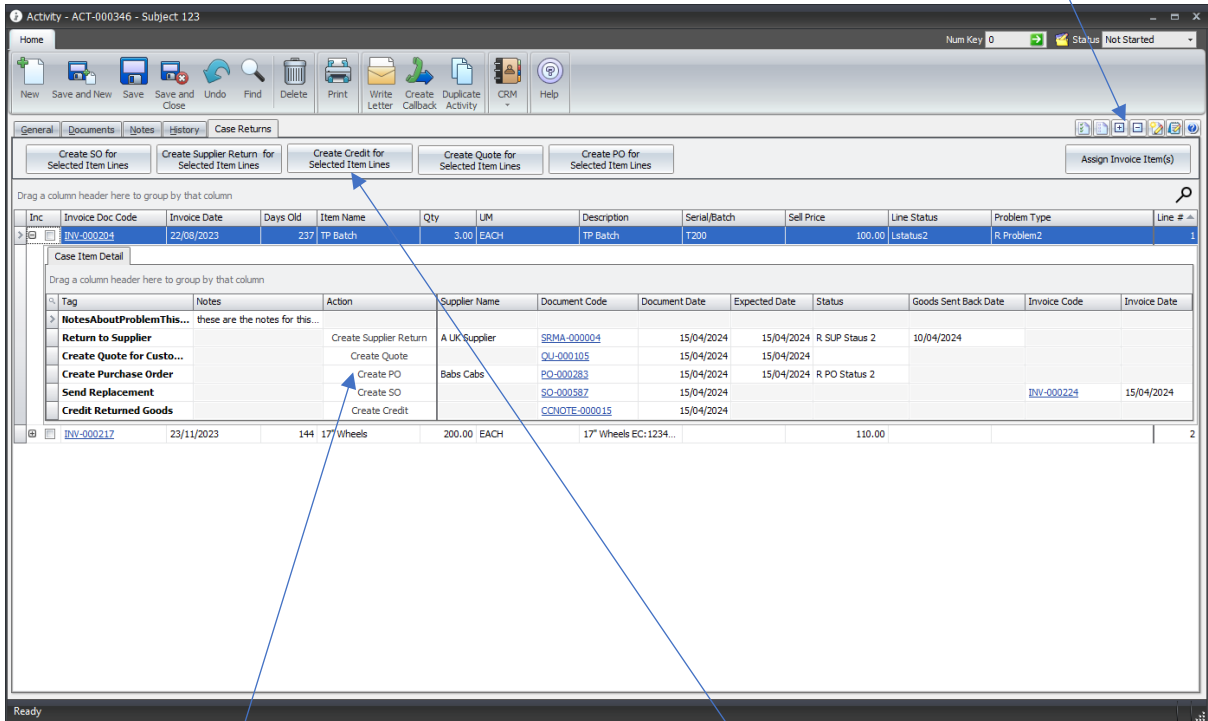
We have added a Case Tab called "Case Returns". This is a grid of items to be returned.

This is where we allow a user to add item lines manually or search posted invoice item lines



If there was a serial number or batch then this is also shown choosing the item. I.e. the search is of invoice item lines, split by serial batch if applicable so a user can pick specific serials. An item line can be any qty but for serial items it would be qty 1 per item line.

The “+” would open the options: as default all open. There are Icon buttons for close all and open all.



You can create per item or tick multiple items and use the Overall toolbar buttons to create : “Send Replacement / Create SO for Selected item lines”. This allows you to put multiple items in a sales order in one go. It would update the individual item lines with same SO code etc.



-“Send to Supplier / Create Supplier Return for Selected Item lines”. If different suppliers create multiple returns.

-“Credit Returned Goods/Create Credit for Selected Item Lines”

-“Create Quote for Selected Item lines”

-“Create PO for Selected Item Lines”

NB all SO or Returns created quote the Case and Item Line # in the Item Description and Header References 1&2.

NB Supplier Returns are for a non stock “RETURNS” item so there is no movement of stock as the supplier could just return it repaired, quote to repair it or write it off etc. To return an item to a supplier otherwise it would have to be booked into stock first which is more admin for no real gain, even more admin for a batch serial item. We enter these details into the description field of the return. (The only Stock movements would come from a Credit Note putting them back into good or defective stock and Send Replacement a new sales order. )

We have Assigned To, Team, Contact, overall problem text, solution, Due Date, etc. on the case overall.

Any item line can be edited, add an item line and cancel status on an item line.

### CRM – Cases - Find “Case Returns” list

The plugin adds a new case returns find list based on all the item lines in the Case Returns item grid. So one line in the list would be an item line from a case. Since we have different statuses per item line in a case this allows us to see across all cases all items what is going on. Filtering search grouping can all be done like below in the find columns :

Case Code	Case Status	Case Due Date	Invoice Code	Invoice Date	Days Old	Item Name	Qty	UoM	Description	Serial/Batch	Sell Price	Line Status	Problem Type	Notes About Problem This Item	Return To Supplier	Supplier Name	Supplier Return Doc Code	Date	Expected Date	Goods Send Back Date
ACT-000246	Not Started	16/04/2024	INV-000204	22/09/2023	327	TP Batch	5.00	EACH	TP Batch	T205	100.00	Assoc2	Problem2	These are the notes for this	A/JR Supplier	0204.000004	15/04/2024	15/04/2024	15/04/2024	
ACT-000246	Not Started	16/04/2024	INV-000217	23/11/2023	144	17" wheels	200.00	EACH	17" wheels EC:123456789		110.00				A/JR Supplier					

Clicking on the hyperlink would open the case. We have Tabs for Open and Completed Cancelled.