Return Process

1. Ask for the original serial number or invoice number
2. Verify the purchase date and if the unit is a stocked item or special order
   - If the unit was a special order or non-stocked item, it is not returnable
   - If the purchase date is more than 60 days, the customer must be informed that they will be charged a restocking fee
   - If the customer is requesting to return the unit to a PDC, verification of the packaging, serial number, core tag and pallet condition must be verified with pictures. If the original condition is not maintained the unit must be shipped back and the customer will be charged return freight. If they are only missing the core tag, this can be shipped for them to attach.
3. Ask if the packaging material has been removed, if yes, let the customer know they will be charged a restocking fee
4. If the packaging has been removed ask if they installed the unit, if yes, let the customer know they will be additional charges to return the unit to the original condition.
5. Document all the information in I-track by following these steps:
   - Create a new Sales Order that matches the original invoice in the billing/shipping information
   - Change the document type to “RMA” in the drop-down box in the upper left corner
   - Use Perform Return Invoice under the Advanced Tab on the bottom of the page to perform the credit
     - Select the original sales order number by pressing on the + sign
     - Click on the upper refund box, this will also select the core refund as well
   - Enter the information in the internal comments field
     - Contact name and phone number/extension and email address
     - Original invoice number and purchase date
     - All information in regards to the charges they were made aware of
   - Save the Sales Order Screen but <u>DO NOT INVOICE!</u> The 8-digit number generated is the RMA number (Return Material Authorization). Give the number to the customer, inform them that this number needs to be attached to the returning unit. Failure to do could lead to a 10 delay in processing the return
     - If still wrapped with original packaging, let the customer know to write the number boldly on a piece of paper and tape it to the wrap
     - If unwrapped have the customer attach a tag with the number and secure the unit to pallet
6. Coordinate with the Core Dept and send the customer a BOL for truck freight back through email and document the freight charges
7. Once the unit has arrived at the shop, the Core Dept will verify all the information entered in the S.O. screen and include the freight charges in the adjustment type drop-down box on the bottom of the Sales Order
8. If the unit has been installed or modified, the Core Dept will contact the Customer Repair Dept for the following
   - A work order and sales order need to be created with the customer’s information
   - Another work order must be created under “Stock” that will be used to “retag” the unit
   - An estimate to return the unit back to original condition needs to be completed

- The customer must be contacted and informed of the additional charge
- Once the repairs are completed it will be “retagged” with the “Stock” serial number. Production Admin Dept will complete all the paper work.
- Invoice the customer for the repairs. If they have a cash account, coordinate with the Core Dept and the Accounting Dept to make sure the billing is completed properly

9. If the information matches and any necessary repairs are completed, process the credit
    - Using the same sales order, change the document type to an “Invoice”
    - Deduct the restocking if applicable using the Adjustment type drop-down on the bottom of the page
    - Finalize the Sales order
10. Turn the completed paper work into the accounting dept and email the contact a copy of the credit