

Handling Customer Returns with Replacement Items

Last Modified on 07/31/2020 2:57 pm EDT

For systems [configured to replace returned product](#) and to automatically generate shipments, creating and receiving a return shipment record will generate an outgoing shipment for the replacement items.

1. Navigate to **Menu > Order Management > Orders**.
2. Use the [Quick Search](#) bar to locate the original order.
Note: Closed orders must be re-opened before you process the return (Actions > Open Order).
3. Click **Management tab > Shipping tab > Plus (+) > Return Shipment**.

Order: 50060 Southglen High School 04/15/2020

Management | Job Costs & Approvals

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New	Shipment	Date	Title	Type	PO	Courier Service	Courier Tracking #	Cost	Tracking Status	Status
	Return Shipment	04/15/20	Southglen High School	OUT				0.00		

Shipments 0.00

Non-Receiving POs (e.g. drop shipments)

PO	Date	Title	Vendor	Req By	Act Shipping Cost	Tracking Status	Status

POs 0.00
Total Cost 0.00

Dept AI | Assigned By: Jamie Gianelli | Assigned To: Jamie Gianelli | Tracking Status

4. At the Shipping Log module, review the incoming return shipment record:
 - o Remove any other items from the Packing List by clicking the **Delete** icon (✕) for those lines.
 - o Change the **Quantity** field to show the number of items being returned.

The screenshot shows the 'Shipping Log' interface for an 'Incoming Return Shipment'. At the top, the shipment number is 50134, the recipient is 'Return; Southglen High School', and the date is 7/31/2020. The status is 'PENDING'. Below this, there are sections for 'Shipped From' (Southglen High School, contact Nikki Huang), 'Shipment Info' (Shipping Cost 0.00, Delivery Date 07/31/20), and 'Description'. The 'Packing List' table contains one entry: Line Item Code TB-NATSCI4, Description The Art of Natural Science, Order 50060, Exp Qty 0, and Quantity 5. The quantity '5' is circled in red. At the bottom, there are search filters for Dept (AI-Shipping), Assigned By (Jamie Gianelli), Assigned To (Kristie Hernandez), and Tracking Status, along with 'Cancel' and 'Save' buttons.

5. Click **Save**.

6. At the Shipment Received confirmation dialog, click **Not Yet**.

This keeps the record in Pending status until the returned product arrives at your warehouse.

When the returned product arrives, your warehouse staff will locate the return shipment record and mark it as received. This will prompt aACE to generate a replacement shipment for the order.

Manually Prevent an Outgoing Replacement Shipment

If you do not wish to replace the returned product, you can prevent the outgoing replacement shipment for an individual order. *Before* you create the return shipment record, you must manually update the original order. Reduce the item quantity there to the number of units your customer is *keeping*.

For example, suppose you originally shipped 25 units. However the customer will be returning five units and doesn't want them replaced. They would still be in receipt of 20 units. You would reduce the *original* order's item quantity from 25 to 20. Similarly if the customer were to return all 25 units, you would reduce the item quantity to zero.

1. Locate and re-open the *original* order (as described above).
2. At the Sales (or Production) Order tab, click **Edit**.
3. Adjust the order item quantity to reflect the number of units the customer is *keeping*.
aACE displays a warning dialog asking if you want to change the new quantity back to

the quantity already shipped.

4. Click **No** to keep the reduced quantity.

The screenshot shows the 'Order: 50076' for 'Brightside Charter School' dated '06/17/20'. The 'Order Items' table contains the following data:

Line Item Code	Description	Invtry	Alts	Upps	Cases	Quantity	BO	DS	SO	Unit Price	Unit Adj	Total
1 > Tblt-2	Student Tablet, 8" screen	371	1	1		9				474.05	0.00	4,266.45
2 > Tblt-8C	Student Tablet, 8" case									23.75	0.00	237.50

The 'Quantity' field for line item 1 is circled in red. A 'Message' dialog box is overlaid on the table with the following text:

WARNING: The quantity you entered is less than the quantity already shipped. Would you like to set the quantity to the quantity already shipped?

The 'No' button in the dialog box is circled in red. The 'Sales' section at the bottom left shows 'Sales' as the campaign type and 'Phone' as the route. The 'Fulfillment' section shows 'Normal' as the fulfillment type. The 'Summary' section at the bottom right shows a Grand Total of 5,413.59.

5. Click **Save**.

6. Create the return shipment (as described above).