

How to Create a Return

Note: If you have not reviewed “How to Create a Receiver,” make sure you do so before reviewing this document.

Return Damaged Goods

To create a return, you will be returning to the “Create Quantity Receiver” page, like we did in the “How to Create a Receiver” guide.

In our first scenario, let us assume that you completed a receiver for an order you received but after opening the package you realize that some of the products are damaged.

To create a return, click the drop down box under “Line Status” and select “Returned.” To finish, choose the quantity that you will be returning then click “save Updates” and “Finish” (Figure 1).

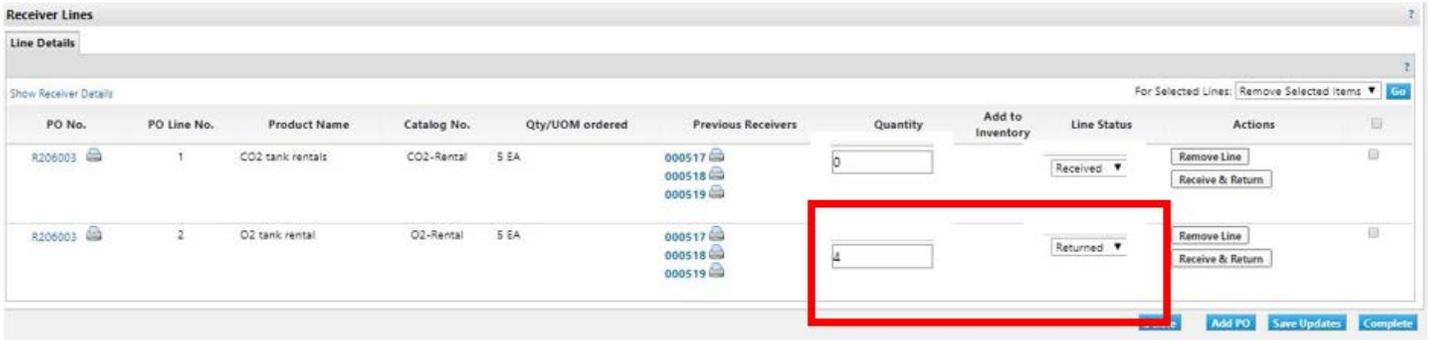


Figure 1

Return Over Ordered Items

In our second scenario, let’s imagine that you over ordered an item and you know ahead of time that you will be returning it. In this step, we will show you how to combine the “Received” and “Return” steps into one function to save time.

To start, go to the “Create Quantity Receiver” page. Next, under “Actions” select “Receive & Return” and another line will be added automatically. Enter the quantity of the items you will be returning and to finish, click “Save Updates” then “Complete” (Figure 2).

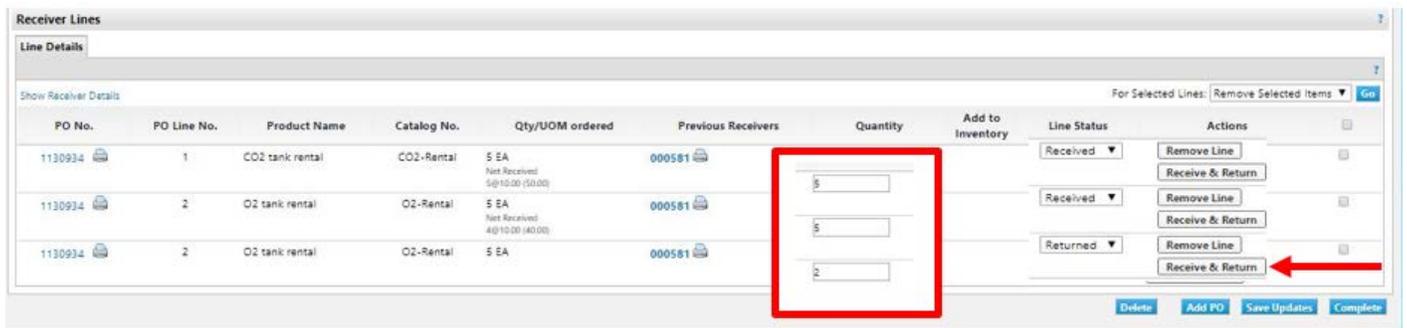


Figure 2

Cancel Items in Progress

In our third scenario, let’s imagine that a supplier has discontinued an item and you would like to cancel it.

SHOPBLUE

To start, return to the “Create Quantity Receiver” page. Next, under “Line Status” click the drop down box and select “Cancelled.” To finish, enter the quantity you would like to cancel then click “Save Updates” and “Complete” (Figure 3).

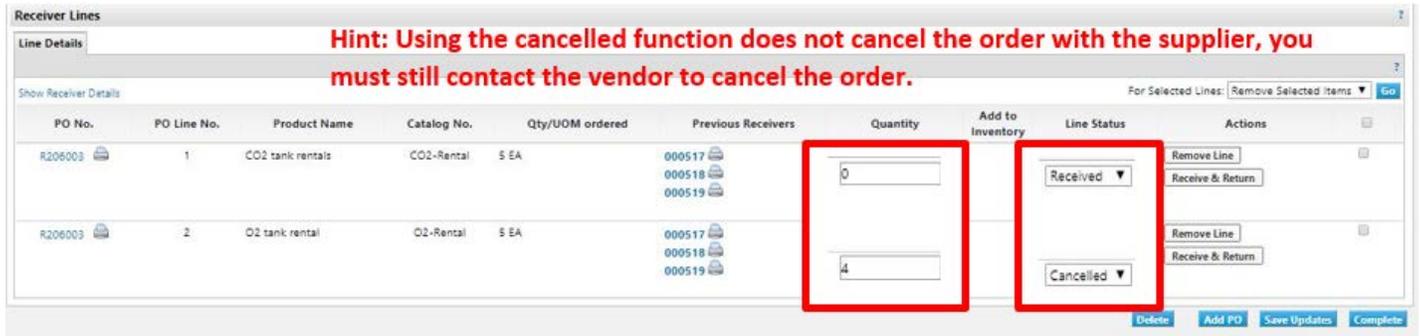


Figure 3

Accept Over Received Items

In our final scenario, let’s imagine that you ordered one unit of a product however when it arrives you actually received 2 units. It is possible in the receiver form to over receive an item. To do this enter the amount you received into the Quantity field. When you click “Save Updates” a warning message will pop up saying that you have over received an item but, you can choose to ignore this message and complete the receiver as is (Figure 4).



Figure 4

See Settlement Status Closed

When you have completed your Receiver and all of your items have been received, ShopBlue will automatically match up your receiver with the PO and supplier invoice. If all of the documents match up then you will have successfully completed your receiver and the “Settlement Status” will be closed (Figure 5).



Figure 5