



Reverse Logistics User Guide

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Chapter 1. IBM Sterling Reverse Logistics Overview

Sterling Reverse Logistics enables access to returns information.

Sterling Selling and Fulfillment Foundation: Product Concepts Guide introduces concepts regarding reverse logistics. The *Sterling Selling and Fulfillment Foundation: Warehouse Management System User Guide* builds on that guide and explains how to use the Return Console to process returns.

The Reverse Logistics module consists of the following software components:

- **Create Return Order Console** - enables you to create return orders, blind returns and exchange orders. The screen level information is explained in Chapter 9, "Create Return Console," on page 119.
- **Return Order Console** - enables you to view return order details, return order alerts, return order releases, return order invoice details, return order instructions and notes. The screen level information is explained in Chapter 8, "Return Console," on page 21.
- **Create Return Shipment** - enables you to create a return shipment and setting up shipment supervisory overrides. The screen level information is explained in Chapter 10, "Create Return Shipment Entry Console," on page 121.
- **Return Shipment Console** - enables you to track return shipments and container and so on. The screen level information is explained in Chapter 11, "Return Shipment Console," on page 123.
- **Service Work Order Console** - enables you to view the service work order related information. You can plan new appointments, add provided or delivery services or modify existing work orders. The screen level information is explained in Chapter 12, "Service Work Order Console Screens".
- **Serviced Area Search** - enables you to search by zip code and determine whether a service is available for a specific area. The screen level information is explained in Chapter 5, "Determining Whether an Area is Serviced".
- **Route Entry** - enables you to enter a resource's route. The screen level information is explained in Chapter 14, "Route Entry Screens".

Understanding Sterling Reverse Logistics User Interface Icons

The following table describes the icons used in the Sterling Reverse Logistics user interface.

Table 1. Sterling Reverse Logistics User Interface Icons





















Icon	Name	Description
	Activity Demand	Enables you to view the activity demand for a shipment, container and so on.
	Add	Enables you to add an instruction line, charges and so on.
	Add Preferred	Enables you to select the preferred time slot for the customer.
	Add Provided Service	Enables you to associate a provided service request with an order or order line.

Table 1. Sterling Reverse Logistics User Interface Icons (continued)

	Additional Attributes	Enables you to view or specify additional attributes for identification, shipping and so on.
	Additional Questions	Enables you to answer questions about the address.
	Additional Questions Check	Indicates one or more questions about the address have been answered.
	Address	Enables you to add or modify an address.
	Address Details	Enables you to view, modify, or add an address.
	Alert	Enables you to view the alerts for an order, shipment and so on.
	Audit	Enables you to view the list of audits for the return order, receipts and so on.
	Calendar	Enables you to select a date from the calendar.
	Chained Orders	Enables you to view related orders or order lines.
	Charges and Taxes	Enables you to view a summary of return charges, fees and their tax breakup.
	Containers	Enables you to view the details of containers or delete containers.
	Delete	Enables you to remove a team member, time slot and so on.
	Delivery Item	Enables you to view the delivery service request associated with the order or order line.
	Gift	Indicates the order line that is a gift.
	Instructions	Enables you to view, modify, or add instructions for return shipments, service requests and so on.
	Instructions URL	Enables you to specify the instruction URL.
	Invoices	Enables you to view the return order invoices.
	Kit Components	Enables you to view the order line's kit components or bundle components.
	Load	Enables you to view the loads associated with the shipment.
	Lookup	Enables you to search for shipments, nodes and so on.
	Notes	Enables you to add notes or contact information for an order, work order and so on.
	Notes Check	Indicates notes or contact information have already been entered for the order, work order and so on.

Table 1. Sterling Reverse Logistics User Interface Icons (continued)

	Order Releases	Enables you to view the list of releases for the return order, based on the release number, ship node and status.
	Payment Collection	Enables you to view collection details for the return order.
	Payment Types	Enables you to view the payment information for the return order. You can also add or create payment types, debit or credit memos.
	Permit Questions	Enables you to answer permit questions for an address.
	Permit Questions Check	Indicates one or more permit questions have already been answered.
	Plus	Enables you to alternatively view and hide details about the selected object, such as tag details or sequence details.
	Provided Item	Enables you to view or cancel the service requests associated with the return order or order line.
	Return Receipt	Enables you to view receipt information for the return order.
	Return Receipt History	Enables you to view the expected receipt lines associated with a receipt header.
	Service Tools	Enables you to add or remove the service tools associated with the work order.
	Shipment Data Types	Enables you to view the requested, expected and actual date type for the return.
	Shipments	Enables you to view the shipment details for a return release.
	Timestamp	Enables you to enter the time.
	Warning Indicator	Indicates the item is waiting for acceptance from a store or node.
	Work Order Hold	Enables you to view holds applied to the load.
	Work Orders	Enables you to view the related work orders associated with the order, service request and so on.

Chapter 2. Performing a Return Service Request

IBM® Sterling Selling and Fulfillment Foundation provides the capability to associate provided service requests with a return order. This chapter explains the various activities related to performing a return service request and how you can perform them.

Navigating a Search Screen

About this task

To navigate to the search screens:

Procedure

1. From the navigation bar, choose Reverse Logistics > Return Console. Initially, the Return Service Request Search By All Attributes - You can search for service requests by all attributes in this screen. screen displays. Select the applicable search view from the Views drop-down list.
2. Enter information in the applicable fields.
3. Click Search. The search results display in the Service Request List screen.

Viewing Service Request Details

About this task

You can view service request details using the Service Request Details screen.

To view the service request details:

Procedure

1. From the Service Request List screen, select the checkboxes of the applicable service requests.
2. From the action bar, click View Details. The Service Request Details screen displays.

Adding Instructions to a Service Request

About this task

You can add instructions to a service request using the Service Request Instructions screen.

To add instructions to a service request:

Procedure

1. From the Service Request List screen, select the checkboxes of the applicable service requests.
2. From the action bar, click View Instructions. The Service Request Instructions screen displays.
3. Enter information in the applicable fields.

4. Click Save.

Viewing Additional Addresses

About this task

You can view additional service request addresses using the More Service Request Addresses screen.

To view additional service request addresses:

Procedure

1. From the Service Request List screen, select the checkboxes of the applicable service requests.
2. From the action bar, click More Addresses. The More Service Request Addresses screen displays.

Chapter 3. Entering a Resource's Route

Typically, a resource has to perform more than one service on a given day. The sequence in which services are completed can be determined ahead of time to ensure an optimal route with the minimum amount of time and distance in between each stop.

If you have already determined your resource's route for a day, you can use the route entry functionality of Sterling Selling and Fulfillment Foundation to record which stop number corresponds to which appointment.

This can be done in the following steps:

1. Search for service work order appointments
2. View service work order appointments
3. Assign stop numbers to appointments for a resource

Searching for Service Work Order Appointments

About this task

To search for service work order appointments:

Procedure

1. From the navigation bar, select Order >Route Entry. The Work Order Appointments Search screen displays.
2. Enter the search criteria for the service work order as applicable. For more information about the search criteria, see the Work Order Search By All Attributes Table.
3. When you've entered the applicable information, click **Search**. This takes you to the Route Entry screen.

Viewing Service Work Order Appointments

About this task

If no resource pool has been selected as part of the search criteria in the Work Order Appointments Search screen, all the appointments for all resource pools are listed for the selected date. Each inner panel corresponds to a resource pool, with the pool's name as the title.

Assigning Stop Numbers To Appointments for a Resource

About this task

To assign stop numbers for appointments:

Procedure

1. In the Resource column, select the resource that carries out this appointment from the drop-down list.
2. In the Stop # column, enter the stop number for the appointment.

3. In the Expected Start Time column, enter the time when the appointment is expected to start, or click the **Timestamp** icon and select it from the pop-up window.
4. In the Expected End Time column, enter the time when the appointment is expected to end, or click the **Timestamp** icon and select it from the pop-up window.
5. Once you are satisfied with your route, click Save.

Chapter 4. Adding or Removing Service Tools to a Service Work Order

Adding or Removing Service Tools to a Service Work Order

Some service work orders may require special tools such as a ladder or a tool kit to perform the service. Sterling Selling and Fulfillment Foundation lets you associate one or more service tools to a service work order.

This task assumes that a service work order has already been created. Service tools can be added to the service work order before the appointment, as a planning activity, or afterwards, to keep track of which tools service work orders generally require.

This can be in done in the following steps:

1. Search for a service work order
2. View service tools for a service work order
3. Add or remove service tools for a service work order

Searching for a Service Work Order

About this task

To search for applicable service work orders:

Procedure

1. From the navigation bar, select Order > Service Work Order Console. The Work Order Search By All Attributes screen displays.
2. Enter the search criteria for the work order as applicable. For more information about this search criteria, see Table 229 on page 143.
3. When you've entered the applicable information, click Search. The Work Order List screen displays.
4. Select the checkbox of the service work orders for which you want to view details, and click the View Details action. The Work Order Details screen displays where you can view details for the service work order you selected.

Viewing Service Tools for a Service Work Order

About this task

From the Work Order Details screen, you can view the service tools that can be associated with the service work order.

In the Primary Information inner panel, click the **Service Tools** icon. The Service Tools screen displays. The Service Tools inner panel displays the service tools that can be associated with the service work order.

Adding Service Tools to a Service Work Order

About this task

From the Service Tools Tools screen, you can add service tools for the service work order. To add a service tool to a service work order:

Procedure

1. Check the checkbox next to the identifier of the service tool.
This enables the Required Quantity and Comments text boxes.
2. If necessary, enter the required quantity, and any additional comments.
3. Click Save.

Removing Service Tools from a Service Work Order

About this task

From the Service Tools Tools screen, you can remove service tools for the service work order. To remove a service tool from a service work order:

Procedure

1. Uncheck the checkbox next to the identifier of the service tool you want to remove.
2. Click Save.

Chapter 5. Determining Whether an Area Is Serviced

Determining Whether an Area is Serviced

If a customer walks into your store and wants to know whether his postal code is serviced by your store for a given type of service, you can use the Serviced Area Search console to find out that information.

This assumes that you are able to map the requested service to a service type as defined in the Applications Manager.

This can be done in the following steps:

1. Search for a serviced area
2. View the available time slots

Searching for a Serviced Area

About this task

To search for a serviced area:

Procedure

1. From the navigation bar, select Order > Serviced Area Search. The Serviced Area Search screen displays.
2. Enter the search criteria for the service work order as applicable. For more information about the search criteria, see Table 267 on page 163.
3. When you have entered the applicable information, click Search. The Serviced Area List screen displays.

Viewing the Available Time Slots for the Service

You can view the available time slots for the requested service and postal code combination in the Serviced Area List screen.

Sterling Selling and Fulfillment Foundation looks for capacity across all the resource pools for the specified Enterprise. If slots are available for the requested postal code, the Available Slots inner panel displays.

Each time slot displays as a row, and each day of the week as a column. The boxes show whether or not the requested postal code can be serviced for each time slot, each day, as follows:

- If the requested postal code is serviced for the day of the week, and capacity is available, a green checkmark appears.
- If the requested postal code is serviced for the day the week, but capacity is not available, a red cross appears.
- If the requested postal code is not ever serviced for the day of the week, a grey background appears, with no icon on top of it.

Chapter 6. Taking an Appointment on a Service Work Order

Taking an Appointment on a Service Work Order

Once a service work order has been created, an appointment has to be taken for the service to be completed.

When taking the appointment, there can be additional factors such as considering supplemental capacity or trying to schedule a customer's appointments against his preferred time slots.

This can be in done in the following steps:

1. Search for a service work order
2. View planned appointments
3. Take an appointment

Searching for a Service Work Order

About this task

To search for applicable service work orders:

Procedure

1. From the navigation bar, select Order > Service Work Order Console. The Table 229 on page 143screen displays.
2. Enter the search criteria for the work order as applicable.
3. When you've entered the applicable information, click **Search**. The Work Order List screen displays.
4. Select the checkbox of the service work orders for which you want to view details, and click the **View Details** action. The "Work Order Details" on page 144 screen display where you can view details for the service work order you selected.

Viewing Planned Appointments

About this task

To view planned appointments:

Procedure

1. In the Work Order Details screen, go to the Open Appointments inner panel.
2. If you are in a multiple appointments context, select the appropriate work order and click the View Execution Details action. Otherwise, click the View Execution Details action. This takes you to the "Execution Details" screen.

Taking an Appointment

When taking an appointment for a service work order, there are some considerations you might want to think about. For example, supplemental capacity, node notification time, or preferred customer slot.

Considering Supplemental Capacity

The Supplemental capacity may be defined for the selected resource pool.

Sterling Selling and Fulfillment Foundation can be configured to automatically consider that extra capacity every time an appointment is taken for certain preferred customers. If that is not the case, however, and you want to consider supplemental capacity on a single appointment, check the Consider Supplemental Capacity checkbox in the Override inner panel.

Considering Node Notification Time

Ship nodes generally require a certain notification time for them to be able process a service request. If this is a high priority service request, you can ignore that minimum notification time for the node. To do this, check the Ignore Node Notification Time checkbox in the Override inner panel.

Considering Product Availability

Sterling Selling and Fulfillment Foundation considers product availability when displaying the available appointment slots. If there is no product availability during an appointment slot, that slot is not available.

Clicking on the Product Availability action in the Constraints inner panel takes you to the Product Availability screen, where you can use the Change Nodes action to specify a different ship node or procure from node if there is no product availability at the current ship node.

You can also check the Ignore Product Availability checkbox in the Override inner panel to remove this restraint and plan appointments without considering product availability.

Awaiting Procurement Confirmation

If configured, Sterling Selling and Fulfillment Foundation enables the procure from node to manually confirm transfer requests. While product lines are awaiting confirmation from the procure from node, the message "Few Prod Lines Are Awaiting Procurement Confirmation" is displayed in the Constraints inner panel.

Clicking on the Product Availability action in the Constraints inner panel takes you to the Product Availability screen, where you can use the Change Nodes action to specify a different procure from node that may not require procurement confirmation.

You can also check the Ignore Product Availability checkbox in the Override inner panel to remove this restraint and plan appointments without considering product availability.

Selecting the Time Slot for Service Work Order Appointments About this task

To select the date from which you want to start looking at available appointment slots:

Procedure

1. In the Available Slots inner panel, click the **Calendar** icon in the Start Date field.
2. Enter how far you into the future you want to look for appointments in the Number Of Days To Consider field.
3. Once you are satisfied with the search parameters, click GO. A grid with time slots and days displays.
4. Select any time slot on the grid where an **Add** icon is displayed. If the buyer on the order is a preferred customer and preferred time slots have been defined for that customer, they are marked by an **Add Preferred** icon instead.
5. Once you have selected the appropriate appointment slot, click the Save Appointment action in the Work Order inner panel, and the appointment is saved.

Results

If a Preferred Resource Pool ID and a Preferred Resource ID were specified on the Capacity Information panel of the Work Order Details screen, they are populated in the Override inner panel in this screen. You may, however, change them if no available slots are found, or if the slots that were found did not accommodate the customer's schedule.

Chapter 7. Managing Team Members on Service Work Order Appointments

Managing Team Members on Service Work Order Appointments

A team member is an individual to whom the execution of the service work order appointment is assigned.

Typically, a service resource is composed of several team members. These team members are defined for each resource in the Applications Manager. When taking service work order appointments, Sterling Selling and Fulfillment Foundation automatically assigns the resource's team members to the appointment, if they have been defined, and the resource has been selected in the service work order details.

Managing team members on your service work order appointments can offer benefits such as facilitating integration with financial systems to ease payroll processing.

This task assumes that a service work order has already been created and an appointment has already been taken for it.

You have, however, the flexibility to change the assigned team members on service work order appointments.

This can be accomplished by:

- Changing the team members for service work order appointments
- or
- Overriding team members for service work order appointments

Changing the Team Members for Service Work Order Appointments

About this task

Changing team members on an appointment involves adding or removing a team member to or from an existing list for any number of appointments in a single service work order. For instance, this could be used to replace a team member that is on sick leave with another member.

This can be done in the following steps:

Procedure

1. Search for a service work order
2. View the team members
3. Add or remove the team members

Searching for a Service Work Order

About this task

To search for applicable service work orders:

Procedure

1. From the navigation bar, select Order > Service Work Order Console. The Work Order Search By All Attributes screen displays.
2. Enter the search criteria for the work order as applicable. For more information about the search criteria, see Table 229 on page 143.
3. When you have entered the applicable information, click Search. This takes you to the Work Order List screen.
4. Select the checkbox of the service work orders for which you want to view details, and click the View Details action. This takes you to the Work Order Details screen for the service work order you selected.

Viewing the Team Members

About this task

To view the team members currently assigned to an appointment:

Procedure

1. From the Work Order Details screen, go to the Open Appointments inner panel.
2. Click the View Execution Details action.

In the case of multiple appointments, select the appointments for which you want to manage team members, and click the View Execution Details action.

The Execution Details screen displays in a pop-up window.

The Team Members inner panel displays the team members currently assigned to this appointment. If a Resource Pool ID and a Resource ID have been specified in the Capacity Information inner panel of the Work Order Details screen, and team members have been defined for that resource in the Applications Manager, they are automatically populated in the Execution Details screen.

Adding a Team Member

About this task

To add a team member to an appointment:

Procedure

1. Click the **Add** icon in the Team Members inner panel.
2. In the text box, enter the identifier of the team member or click the **Lookup** icon to look it up.
3. If you are ready to add the team member, click Save. If you do not want to add the team member, click the **Delete** icon.

Removing a Team Member

About this task

To remove one or more team members from this appointment:

Procedure

1. Select the checkbox of the team members you want to remove.
2. Click the Remove action in the Team Members inner panel.

Overriding Team Members for Service Work Order Appointments

About this task

Overriding team members for service work order appointments overwrites the current list of members with a new one. Therefore, this feature cannot be used to add or remove a team member from a pre-existing list. However, you can do this for a number of appointments for different service work orders at once.

This can be done in the following steps:

Procedure

1. Search for service work order appointments
2. View service work order appointments
3. Create the new list of team members

Searching for Service Work Order Appointments

About this task

To search for service work order appointments:

Procedure

1. From the navigation bar, select Order >Route Entry. The Work Order Appointments Search screen displays.
2. Enter the search criteria for the service work order as applicable. For more information about the search criteria, see the Work Order Search By All Attributes Table.
3. When you've entered the applicable information, click **Search**. This takes you to the Route Entry screen.

Viewing Service Work Order Appointments

About this task

If no resource pool has been selected as part of the search criteria in the Work Order Appointments Search screen, all the appointments for all resource pools are listed for the selected date. Each inner panel corresponds to a resource pool, with the pool's name as the title.

Creating the New List of Team Members

About this task

To override Team Members for appointments and create a new list:

Procedure

1. Select the appointments for which you want to override the team members.
2. Click the Override Team Members action. The Override Team Members screen displays in a pop-up window.
3. In the Override Team Members screen, click the **Add** icon. In the text box, enter the identifier of the team member or click the **Lookup** icon to look it up. If you want to remove a team member from your new list, click the **Delete** icon.
4. Once you are satisfied with your list, click Save.

Chapter 8. Return Console

The Return Console provides access to information about returns. Users can view return order information to inspect returned items, determine how returned items should be handled, and provide the Buyer with the necessary amount of credit for the return.

Several types of searches can be performed from the Return Console's Search window.

Return Search By Status

You can search for a return order based on its status in this screen.

Do not use spaces before or after any text you enter in the search fields, as this may result in inconsistent or inaccurate results.

Table 2. Return Search by Status

Fields	Description
Document Type	Select the appropriate document type to search for, if applicable.
Enterprise	Choose the field and lookup option to find the specific Enterprise you want use. Or choose Across Enterprises to use of all the Enterprises.
Across Enterprises	Select this option if you are searching across all enterprises.
Return #	Enter the return number you are searching for, if applicable.
Order #	Enter the order number from which the returns you are searching for were created, if applicable.
Return Date	Enter the date the return you are searching for was entered, if applicable.
Buyer	Enter the Buyer associated with the returns you want to search for, if applicable.
Seller	Enter the Seller associated with the returns you want to search for, if applicable.
Return Line Status	Select the status range of the returns you want to search for, if applicable.
Held Returns	Select if the returns you are searching for are being held.
Hold Reason Code	If you selected Held Returns, then select the reason code the returns you are searching for are associated with.
Return Order State	Select to search for returns in one of the following conditions: <ul style="list-style-type: none">• Open - returns that have not been closed• Recent - all returns (open and closed) that have not yet been purged to the history tables• History - returns that have been purged to the history tables• All - all returns (open, recent, and history)
Max Records	Enter the maximum number of returns you want returned from your search.

The Return Order List screen is displayed as a result of this status search.

Return Search By Item

You can search for return orders by the item information included in the return with the help of this screen.

Do not use spaces before or after any text you enter in the search fields, as this may result in inconsistent or inaccurate results.

Table 3. Return Search by Item

Fields	Description
Document Type	Select the appropriate document type to search for, if applicable.
Enterprise	Choose the field and lookup option to find the specific Enterprise you want use. Or choose Across Enterprises to use of all the Enterprises.
Across Enterprises	Select this option if you are searching across all enterprises.
Return #	Enter the return number you are searching for, if applicable.
Order #	Enter the order number from which the returns you are searching for were created, if applicable.
Item ID	Enter the item ID to search for returns containing a specific item, if applicable.
Product Class	Select an item product class to search for returns containing an item that has a specific product class, if applicable.
Unit of Measure	Select an item unit of measure to search for returns containing an item that has a specific unit of measure, if applicable.
Line Type	Select a line type to search for returns containing an item that has a specific line type, if applicable.
Return To Node	Enter the return node under which you want to search for returns, if applicable.
Max Records	Enter the maximum number of returns you want returned from your search.

The Return Order List screen is displayed as a result of this search.

Return Search by Draft Returns

You can search for draft returns using this screen.

Do not use spaces before or after any text you enter in the search fields, as this may result in inconsistent or inaccurate results.

Table 4. Return Search by Draft Returns

Fields	Description
Document Type	Select the appropriate document type to search for, if applicable.

Table 4. Return Search by Draft Returns (continued)

Fields	Description
Enterprise	Choose the field and lookup option to find the specific Enterprise you want use. Or choose Across Enterprises to use of all the Enterprises.
Across Enterprises	Select this option if you are searching across all enterprises.
Return #	Enter the draft return number you are searching for, if applicable.
Order #	Enter the order number from which the draft returns you are searching for were created, if applicable.
Buyer	Enter the Buyer associated with the draft returns you are searching for, if applicable.
Buyer Account #	Enter the Buyer account number associated with the draft returns you are searching for, if applicable.
Seller	Enter the Seller associated with the draft returns you are searching for, if applicable.
Max Records	Enter the maximum number of draft returns you want returned from your search.

The Return Order List screen is displayed as a result of this status search.

Return Order List

The Return List window displays the results of a return search. You can perform actions on a single return or multiple returns by selecting the check boxes of the returns you want to perform an action on and choosing the applicable action from the action bar.

Table 5. Return List

Actions	Description
View Details	This action takes you to the Return Detail screen where you can view the details of the selected return orders.
View Alerts	This action takes you to the Return Alerts screen where you can view the alerts raised by the selected return orders.
View Releases	This action takes you to the Return Releases For Order screen where you can view the releases associated with the selected return orders.
View Invoices	This action takes you to the Return Invoices screen where you can view the invoices associated with the selected return orders.
View Instructions	This action takes you to the Return Instructions screen where you can view the instructions associated with the selected return orders.
View Notes	This action takes you to the Notes screen where you can view the relevant notes associated with the selected return orders.
View Audit	This action takes you to the Return Audits screen where you can view the audits associated with the selected return orders.

Table 5. Return List (continued)

Cancel	This action lets you cancel the selected return orders. An alert window pops up to confirm the changes. However, you cannot cancel a return that has been released.
Remove Order	This action lets you remove the selected return orders. An alert window pops up to confirm the changes
View Holds	This action takes you to the View Holds On Returns screen where you can view, add, modify or remove the holds associated with the selected return orders.
Fields	Description
Return #	The return number. Click this link to view the details of the return order in the Return Detail screen.
Status	The current status of the return. If a history icon appears here, the return is a history return.
Enterprise	The Enterprise associated with the return.
Buyer	The Buyer organization that created the return.
Order Date	The date the return was created.
Total Amount	The return's total amount.

Return Detail

The return detail screen provides various information about a single return order. The actions that can be performed in the return detail screen are explained in the following tables:

Table 6. Return Detail Screen, Return

View Icons	Description
Alert	Active Alerts - This icon takes you to the Return Alerts screen where you can view the alerts for the return order.
Additional Attributes	More Attributes - This icon takes you to the More Return Attributes screen where you can specify other attributes for the return order.
Order Releases	Releases - This icon takes you to the Return Releases For Order screen where you can view the list of return releases based on the release number, ship node and status.
Work Orders	Work Orders - This icon takes you to the Work Orders screen where you can view the related work orders associated with this return order.
Invoices	Invoices - This icon takes you to the Return Invoices screen to view the return invoices.
Shipments	Shipments - This icon takes you to the Return Shipments screen where you can view the shipment and container details.
Instructions	Instructions - This icon lets you view the Return Instructions screen where you can add, modify or delete the instructions for the return.
Address	More Addresses - This icon takes you to the Additional Order Addresses screen where you can add or modify return address.

Table 6. Return Detail Screen, Return (continued)

Audit	Return Audits - This icon takes you to the Return Audits screen where you can view the list of audits done for that return order.
Notes	Notes - This icon lets you view the Notes where you can add the notes for a return. If notes have been added, the Notes Check icon is displayed instead.
Payment Types	Payment Information - This icon takes you to the Return Payment Information screen where you can view the payment information for the return order. You can also add or create payment types, debit or credit memos in this screen.
Payment Collection	View Collection Details - This icon takes you to the Collection Details screen where you can view the collection details for the return order.
Chained Orders	Related Orders - This icon lets you view the Related Orders screen. For example you can view the Return Orders created from the return console by clicking this icon.
Return Receipt	Receipts - This icon takes you to the Return Receipt List screen where you can view the receipts and perform associated actions for the given return order.
Shipment Data Types	Order Dates - This icon takes you to the Return Dates screen to view the requested, expected and actual date type for the given return.
Actions	Description
Confirm	This action lets you confirm the Draft orders.
Cancel Open Quantity	This action converts the quantity of return lines to zero provided they are in the Draft status.
Authorize	This action takes you to the Authorize Return screen for authorizing the return order.
Release	You can release the return using this action.
Add Pickup Request	This action takes you to the Add Pickup Request screen where you can add the necessary pickup requests for the return.
Add Service Request	This action enables you to add stand-alone (not associated with order lines) provided service items. This action takes you to the Service Request Search By Item screen where you can search for service requests you want to add to the return order. For more information about the Service Request Search By Item screen, see the <i>Sterling Selling and Fulfillment Foundation: Distributed Order Management User Guide</i> .
Report/Record Receipt	This action takes you to the Receive screen where you can perform associated actions to receive the return. If you do not have a receipt for the return order, clicking this action takes you to the "Start Receipt" on page 83 screen.
Create Derived Return Order	This action lets you create derived return orders for the return lines. This action takes you to the Order Entry screen to create an exchange order.
View Holds	This action lets you view, add or remove return holds. For more information, refer to View Holds On Returns screen for field level descriptions of the screen.

Table 6. Return Detail Screen, Return (continued)

Create Work Order	This action lets you create service work order for the order lines. Upon clicking this action you are taken to the Work Order Entry Screen screen where you can enter the relevant information for creating a work order.
Fields	Description
Enterprise	The Enterprise associated with the return.
Buyer	The Buyer organization that placed the return. This field can be edited if the return is in Draft Created status. In any other status, click this link to view the Organization Details screen of the buyer.
Seller	The Seller organization that is handling the return. This field can be edited if the return is in Draft Created status. In any other status, click this link to view the Organization Details screen of the buyer.
Return #	The return number.
Status	The current status of the return. Click this link to view the Return Status Breakup screen.
Return Date	The date the return was placed.
Return Type	This field can be customized as needed.
Currency	The currency of the return payment options.
Return Against Order	This field indicates if the return order is created against a sales order. Valid values are Y or N.
Document Type	The document type associated with the order. For example, Return Order is a document type.
Exchange Type	Select the exchange type from the drop-down list. The option of changing the type of an exchange is only available when the order is in Draft Order Created status. Once the order is confirmed, you are not able to edit this field. Note: This field is only displayed for exchange orders.
Created For Return #	The return order number for which the exchange was created. Click on the hyperlink to see that return order. Note: This field is only displayed for exchange orders.

Table 7. Return From

View Icon	Description
Address Details	Address Details - Choose this icon to view or modify the Return From addresses. For more information about the screen that is displayed, refer to Modify Return From Address.
Additional Questions	Additional Address Questions - Choose this icon to view or modify answers to address questions for this ship to address. If any questions have already been answered, a Additional Questions Check icon is displayed. For more information about the screen that is displayed, refer to the Configured Questions screen.
The name and address of the person or organization from where the product is being returned.	

Table 8. Return To

View Icon	
Address Details	Address Details - Choose this icon to view or modify the Return To addresses. For more information about the screen that is displayed, refer to Organization Address Details Screen.
The name and address of the person or organization where the order is to be returned.	

Table 9. Return Detail Screen, Charges

View Icon	
Charges and Taxes	Charges and Taxes - This icon takes you to the Return Refund Summary screen to view the summary of the return charges, fees and their tax breakup.
Fields	Description
Line Sub-Total	The total of all of the line item totals.
Total Charges	The total amount of extra charges for the order. For example, shipping, handling, and personalization charges.
Total Tax	The total tax amount for the order.
Total Fees	The total fee amount that is being applied to the order.
Grand Total	The final total, including all extra charges, taxes, and discounts.
Invoiced	The invoiced amount.
Balance	The difference between the Grand Total and Invoiced amount.

The view icons shown in the Return Detail Screen, Return Lines table appear along the side of each order line before the line number.

Table 10. Return Detail Screen, Return Lines

View Icons	
Add Provided Service	Line has Service Requests that can be added - This icon identifies a return line that can be associated with one or more provided service requests. Click this icon to associate a provided service request with the order line. For more information, refer to Associate Service Request.
Provided Item	Line Has Associated Service Requests - This icon identifies a return line that has one or more service requests associated with it. Click this icon to view the provided service requests associated with the order line. For more information, refer to Associated Service Requests.
Delivery Item	Pickup Request needs to be added - This icon identifies a return line that must be associated with a pickup request. By clicking this icon, you can view the pickup requests that can be associated with the order. For more information, refer to Add Pickup Request.
Work Orders	View Work Orders - This icon identifies a return line that has one or more work orders associated with it. By clicking this icon, you can view the work orders associated with this order. For more information, refer to Work Order Details.

Table 10. Return Detail Screen, Return Lines (continued)

Chained Orders	Related Lines - This icon identifies a return line that is related to one or more other order lines. By clicking this icon, you can view the associated related order lines. For more information, refer to Related Order Lines.
Gift	This is a Gift Line - This icon identifies an order line that is a gift.
Instructions	Instructions - This icon identifies an return line that has one or more instructions associated with it. By clicking this icon, you can view the return line's instructions. For more information, refer to Return Line Instructions.
Kit Components	Kit Components - This icon identifies an return line that is a kit. By clicking this icon, you can view the return line's kit components. For more information, refer to Kit Components.
Actions	Description
View Details	This action takes you to the Return Line Detail screen for the selected return lines.
Add Order Line	This action takes you to the screen where you can lookup orders that contain returnable order lines for the selected return lines.
View Audits	This action takes you to the Return Line Audits screen which stores the audit information for the selected return lines.
Fields	Description
Line	The return line number.
Derived From Order	The order from which the line is derived.
Item ID	The item ID.
PC	The item classification such as first quality, second quality, or finished good.
UOM	The item's unit of measurement.
Description	A description of the item.
Reason Code	A drop-down list of reasons why the item was returned.
Line Type	The line type.
Return To Node	The node handling the return.
Line Qty	The quantity of the line item. Entering '0' indicates a quantity of zero. Leaving this field blank indicates you want to ignore the line. This field can be modified.
Amount	The amount the Buyer is charged for the line.
Status	The current status of the return line.

You can view the pickup requests associated with the product line in this panel. The view icons shown in the Return Detail Screen, Pickup Request table appear along the side of each pickup request before the line number.

Table 11. Return Detail Screen, Pickup Request

View Icons

Table 11. Return Detail Screen, Pickup Request (continued)

Work Orders	View Work Orders - This icon identifies the work orders associated with the pickup request. For more information, refer to Work Order Details.
Instructions	Instructions - This icon identifies one or more instructions associated with the pickup request. For more information, refer to Pickup Request Instructions.
Actions	Description
View Details	This action takes you to the Pickup Request Details screen for the selected pickup request.
View Instructions	This screen takes you to the Pickup Request Instructions screen where you can create, modify or delete instructions for the pickup request.
Cancel	This action lets you cancel the selected pickup requests. A modification reason screen pops up, after you enter the reason code and press OK, the pickup request is cancelled.
Remove	This action lets you remove pickup requests when they are in the Draft Status .
Add Line	This action takes you to the Additional Product Lines screen where you can associate additional product lines to the pickup service.
Fields	Description
Line	The order's line. Click this link to view the Pickup Request Details screen.
Derived From Order	The order from which the line is derived.
Item ID	The pickup item's ID.
Ship Node	The node from which this pickup is carried out.
Description	The description of the pickup.
Appointment	The date and time of the pickup.
Amount	The amount of the pickup.
Status of Associated Product	The status of the pickup line. This is same as the return line status.

You can view the service requests associated with the product line in this panel. The view icons shown in the Return Detail Screen, Service Requests table appear along the side of each service request before the line number.

Table 12. Return Detail Screen, Service Requests

View Icons	
Work Orders	View Work Orders - This icon identifies the work orders associated with the service request. For more information, see Work Order Details.
Instructions	Instructions - This icon identifies one or more instructions associated with the service request. For more information, see Service Request Instructions.
Actions	Description
View Details	This action takes you to the Service Request Details screen where you can view the details of the selected service request.

Table 12. Return Detail Screen, Service Requests (continued)

View Instructions	This action takes you to the Service Request Instructions screen where you can create, modify or delete instructions for the selected service request.
Cancel	This action lets you cancel the selected service requests. In the Modification Reason screen that pops up, enter the reason code and reason text, and click OK to cancel the service request.
Remove	This action lets you remove service requests that are in draft status.
Fields	Description
Line	The line of the order. Click this link to view the Service Request Details screen where you can view the details of the selected service request.
Derived From Order	The order from which the line is derived.
Item ID	The item identifier of the service.
Description	The description of the service.
Appointment	The date and time of appointment.
Return To Node	The node handling the return.
Amount	The amount of the service.
Status	The status of the service line. This is the same as the return line status.

Return Alerts

You can view the alerts associated with the return orders in this screen.

Table 13. Return

Fields	Description
Enterprise	The Enterprise associated with the return.
Buyer	The Buyer organization that placed the return.
Seller	The Seller organization that is handling the return.
Return #	The return number.
Status	The current status of the return. Click this link to view the Return Status Breakup screen.
Return Date	The date the return was placed.
Return Type	This field can be customized as needed.
Currency	Monetary denomination used.
Return Against Order	Indicates whether or not the return was created against an order.
Exchange Order	The number of the exchange order that was created for this return. Click on the hyperlink to see that exchange order. Note: This field is only displayed if an exchange order has been created for this return.

Table 14. Return Alerts Screen, Alert

Action	Description
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Table 14. Return Alerts Screen, Alert (continued)

View Details	This action takes you to the Alert Detail screen to view the details of the alert raised. For more information about using the Alert Console, see the <i>Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide</i> .
Fields	Description
Alert ID	The alert ID. Click this link to view the alert details.
Type	The type of alert raised. For example, ON_FAILURE or FAILED_AUTH.
Description	A brief description of the alert.
Queue	The queue the alert has been assigned to.
Priority	The alert priority.
Owner	The user who is handling the alert.
Raised On	The date the alert was raised.

More Return Attributes

You can view additional information related to a return in this screen.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

Table 15. More Return Attributes Screen, Other Attributes

Fields	Description
Return Name	The return name. This field can be used as per your business practices.
Entered By	This field displays the user ID of the user who entered the return. This field can be modified.
Source	The method of order entry. For example, web site, kiosk. This field can be modified.
Created At Node	The node the return was created at.
Return To Node	The node handling the return.
Price Program	Select the price program used to determine the pricing of the items on the return.
Return By Gift Recipient	Check this if items are being returned by the gift recipient of the original order.

Enter the relevant information and click Save to update the changes.

Return Releases For Order

You can view the individual releases that have been sent to the nodes scheduled to fulfill a return.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

Table 16. Return Releases For Order Screen, Return Releases

Action	Description
View Details	This action takes you to the Return Release Details screen for the selected releases.
Fields	Description
Release #	The release number. Click this link to view the Return Release Details screen.
Return To Node	The node handling the return. Click this link to view the ship node details. For more information about this screen, see the <i>Sterling Selling and Fulfillment Foundation: Distributed Order Management User Guide</i> .
Status	The current status of the return release. Click this link to view the Return Release Status Breakup screen.

Work Orders

You can view the work orders related to the return through the return details screen. Return service work orders only apply to delivery services and value-added services. From the Return action bar, click the **Work Orders** icon. The Work Orders screen appears.

When creating a synchronized work order for return and exchange, the header level work order icon only appears in the line level panels.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

Table 17. Work Orders Screen, Service Work Orders

Actions	Description
View Details	This action takes you to the Work Order Details screen where you can view the work orders associated with this return.
Fields	Description
Work Order #	The work order number. Click this link to view the work order details. Click the Expand All button, details for each work order are expanded. If you click the Collapse All button, details for each work order are collapsed. This inner panel is only displayed if service work orders are associated with the return.
Service Lines	The return work orders do not contain associated Provided Services. Hence the service lines are just delivery lines. <ul style="list-style-type: none"> Order Line Related Info - The information related to the service item. Displayed values are item ID and item description. Item Group Code - The group code of the item. For delivery services the item group code is Delivery Service. Required Quantity - The quantity of the service items required..

Table 17. Work Orders Screen, Service Work Orders (continued)

Products being Delivered	<ul style="list-style-type: none"> Item Related Info - The information related to the product item. Displayed values are item ID and item description. PC - The product item's product class. UOM - The product item's unit of measure. Required Quantity - The quantity of the product item on the work order. Delivered Quantity - The quantity of the delivery item on the work order.
Ship Node	The node from which the resource is originating.
Status	The status of the work order.
Appointment	If applicable, the date and time of appointments taken for that work order.
Pre-call Status	The status of the pre-call, if applicable.

The value-added services inner panel provides information on the WMS work orders that are associated with this return. Please note that this inner panel is only displayed if value-added service work orders are associated with this return.

Table 18. Work Orders Screen, Value-Added Services

Action	Description
View Details	This action takes you to the value-added services work order details screen. For more information about viewing this screen, see the <i>Sterling Selling and Fulfillment Foundation: Warehouse Management System User Guide</i> .
Fields	Description
Work Order #	The work order number associated with the return. Click this link to view the work order details.
Ship Node	The node from which the resource is originating.
Service Item Group	The service item group associated with the work order.
Priority	The work order priority.
Segment Type	Segment type of the item. A segment type indicates an inventory category. Typical values are MTC - Made To Customer or MTO - Made to Order.
Segment #	Segment number of the item. A segment holds either the specific buyer or specific order number that requires dedication.
Status	The work order status.

Return Invoices

You can view the invoices that have been created from the return for payment collection purposes.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

Table 19. Return Invoices Screen, Invoices

Action	Description
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Table 19. Return Invoices Screen, Invoices (continued)

View Details	This action takes you to the Invoice Details screen where you can view the invoice summary details.
Fields	Description
Invoice #	The invoice number for this return. Click this link to view the Invoice Details screen.
Invoice Type	The type of invoice created. For example, Credit Memo is a type of an invoice.
Total Amount	The total amount for which the invoice was recorded.
Amount Collected	The amount of invoice collected.

Invoice Details

The invoice details for a return order can be viewed in this screen.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

Table 20. Invoices

Fields	Description
Return #	The return with which the invoice is associated. Click this link to view the Return Detail screen.
Collected Through AR?	Indicates if the payment was collected through accounts receivable.
Currency	The currency used on the invoice.
Invoice #	The invoice number.
Invoice Type	The type of invoice. For example, shipping invoice, debit invoice, or credit invoice.
Reference	This field can be customized as needed.

Table 21. Invoice Details Screen, BillTo

View Icon	Description
Address Details	Address Details - Choose this icon to view or modify the BillTo addresses. For more information about the screen that is displayed, refer to Organization Address Details Screen screen.
The name and address of the person or organization being debited.	

The summary panel is tabulated for the return header and return line invoices. The field descriptions for each of these is as follows:

Table 22. Invoice Details Screen, Summary

Fields	Description
Price	The price at the return header and return line levels before any discounts, charges, or taxes have been applied to it.

Table 22. Invoice Details Screen, Summary (continued)

Fields	Description
Fees	Any fees at the return header and return line levels. Note: At the header level, this charge is applied when the final shipment has been received, in case of multiple shipments. At the line level, this charge is applied to the first shipment received, in the case of multiple shipments.
Charges	Any additional charges at the return header and return line levels.
Taxes	Any additional taxes at the return header and return line levels.
Totals	The total invoice amount at the return header and return line levels after fees, charges, or taxes have been applied to the original price.

Table 23. Invoice Details Screen, Balance

Field	Description
Invoiced	The total amount of the invoice.
Collected	The amount that has currently been paid towards the invoice. Click this link to view the Collection Details screen.
Amount Collected Through AR	The amount paid towards the invoice through accounts receivable, if applicable.
Balance	The amount remaining to be collected.

Return Shipments

You can view the shipments that have been made against a return.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

For history returns, all actions on the Return Shipments screen are presented if the shipments are requested for a history shipment. All actions are allowed if the shipments are from the regular shipment table.

Table 24. Return Shipments Screen, Shipments

Action	Description
View Details	This action takes you to the Return Shipment Details screen where you can view the details of the shipments and containers.
Fields	Description
Shipment #	The shipment number associated with the return, if applicable. Click this link to view the Return Shipment Details screen.
Shipper's Ref. #	The shipment reference number associated with the return.
Expected Ship Date	The date the shipment is expected to ship.
Ship Mode	The shipping mode.

Table 24. Return Shipments Screen, Shipments (continued)

Return To Node	The return to node of the shipment.
Recv Node	The receiving node of the return shipment.
Status	The shipment status.

Return Instructions

You can view information related to the personalization of an return order, such as the attachment of a gift message or the style of wrapping paper to be used when packing an item.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

Table 25. Instructions Window

Action	Description
Delete Instruction	This action enables you to delete the selected instructions. Upon clicking this action, an alert window appears to confirm the deletion of instructions.
Fields	
Instruction Type	The type of instruction, such as Gift, Pick, Pack, Ship, or Other.
Text	The specific instructions to be performed on the order. Specify the instruction URL next to the Instruction URL icon.

You can also use the Instructions window for:

- **Adding an Instruction** - You can add instructions that add a customer's notes to each return. Instructions are created to inform the individual responsible for packing the return of the Buyer's special requests. Select the **Add** icon to add the instruction lines and enter the relevant information in the fields as discussed in the Instructions table.
- **Modify an Instruction** - The information in the Return Instructions screen can be modified by entering the modified information and selecting Save.

Additional Order Addresses

You can view any additional addresses as needed by your business. For more information about defining additional address types, see the *Sterling Selling and Fulfillment Foundation: Reverse Logistics Configuration Guide*.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

Table 26. ForwardTo

View Icon	Description
Address Details	Address Details - Choose this icon to view or modify the ForwardTo addresses. For more information about the screen that is displayed, see Organization Address Details Screen.
The name and address of the person or organization where the return is to be forwarded.	

Return Audits

You can view audits logged against a return. An audit is logged against a return when any type of modification is made to the return.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

Table 27. Return Audits Screen, Audits

Action	Description
View Details	This action takes you to the Return Audit Details screen for the selected audits.
Fields	Description
Order Created in Sterling	The date and time the order was created.
Audit #	The audit identification number. Click on the Expand All button, the audit details for each audit are expanded. If you click on the Collapse All button, the audit details for each audit are collapsed. <ul style="list-style-type: none">• Detail # - The audit details identification number. Click this link to go to the Return Audit Details screen.• Order Line Related Info - Any information related to order lines impacted by the modification, including:<ul style="list-style-type: none">Item ID - the item associated with the audit.Item Description - a brief description of the item.• Line Number - the line number associated with the audit. Click this link to view the Return Line Detail screen.• Modification Level - The level of modification for the corresponding audit detail such as header or line.• Modification Type - The type of modification, such as change payment status or change carrier, for the corresponding audit detail.
Date	The date and time the modification was carried out.
Modified By	The user that performed the modification.
Reason	The reason the modification occurred and any additional information explaining the modification entered by the user.
Modification Levels	A comma separated list of all levels of modification for the audit.
Modification Types	A list of the types of modifications for the audit. There is a maximum of three items shown with an ellipsis on the third line if there are more items.

Return Audit Details

You can view more details of a return's audit in this screen.

Table 28. Return Audit Details Screen, Return Audit

Fields	Description
Return #	The return number the modification was performed on.

Table 28. Return Audit Details Screen, Return Audit (continued)

Fields	Description
Enterprise Code	The Enterprise that owns the return.
Modification Level	The level the return was modified at. For example, return or return LINE.
Modification Type	The type of modification performed on the return.
Reason Code	The reason code detailing why the modification was performed.
Reason Text	Additional details about why the modification was performed.
Reference #1	Reference information about the return audit.
Reference #2	Reference information about the return audit.
Reference #3	Reference information about the return audit.
Reference #4	Reference information about the return audit.

Table 29. Return Audit Details Screen, Return Audit Details

Fields	Description
Audit Type	The type of audit performed.
Identifier	The audit identifier.
Name	The attribute that was modified.
Old Value	The value of the modified attribute prior to modification.
New Value	The value of the modified attribute after modification.

Notes

You can add notes to an return by selecting the **Notes** icon in the return header panel of Return Detail screen.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

Enter the relevant information and click **Save** to create the note.

Table 30. Notes Screen, Notes

Fields	Description
Contact Time	The time at which this note was added to the work order. This is defaulted to the creation time of the Notes pop-up window.
Contact User	The user who created this note. This is defaulted to the logged on user.
Reason Code	The reason code for this note.
Contact Type	The type of contact information on this note, for example phone or e-mail.
Contact Reference	The contact information on this note. For example, if contact type is phone, the contact's phone number can be entered here. If contact type is e-mail, the contact's e-mail address can be entered.

Table 30. Notes Screen, Notes (continued)

Fields	Description
Add Note	The note for this work order.

Return Payment Information

You can view the payment information related to an return, including the methods of payment, charge sequence, and collection amounts.

Payment transactions can be in any one of the following states:

- Awaiting Payment Information - Sterling Selling and Fulfillment Foundation is waiting for a third-party payment processing application to receive the Buyer's payment information before the return can be authorized.
- Invoiced - An invoice has been created and distributed to the necessary parties.
- Failed Charge - A problem occurred when payment collection was attempted and manual intervention is required.
- Hold - For some reason the return must be put on hold until a payment issue is resolved.
- Paid - The settlement has been received and the return can be closed.
- Not Applicable - Payment status is not applicable. For example, if the return is a draft return.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

Return Payment Information Screen, Payment Information

Table 31. Return Payment Information Screen, Payment Information

Actions	Description
Add Payment Type	This action takes you to the Add Order Payment Information screen.
Create Credit Memo	This action takes you to the Create Credit Memo screen where you can create credit memos for the payment types.
Create Debit Memo	This action takes you to the Create Debit Memo screen where you can create debit memos for the payment types.
View Collection Details	This action lets you view the Collection Details screen where you can
Fields	Description
Payment Rule	The payment rule used for invoicing, settlement, and collection. For more information about payment rules, see the <i>Sterling Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide</i> .
Total Adjustments	The total adjustments made to the amount after credits and debits have been taken into consideration.
Total Collected	The total amount of the return that has been collected.
Open Authorized	The amount that has been authorized.
Total Refunded	The total amount of the return that has been refunded.
Total Cancelled	The total amount of the return that has been cancelled as a result of cancelling the return lines.

Table 31. Return Payment Information Screen, Payment Information (continued)

Funds From Return	<p>The total funds that can potentially be transferred from the return that originated the exchange.</p> <p>The funds from the return are broken down as follows:</p> <ul style="list-style-type: none"> • Total Transferred: The total of the funds that have been transferred from the return. • Pending Transfer: The total of the funds that have not yet been transferred from the return. <p>Note: This field is only displayed for exchange orders.</p>
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Return Payment Information Screen, Credit Card

The payment information can have the following fields if a payment type has been defined.

If the payment type displayed is in the credit card payment type group the following fields are defined:

Table 32. Return Payment Information Screen, Credit Card

View Icons	Description
Address Details	<p>Address Details - This icon takes you to the Address Details screen where you can view the Bill To address on this credit card.</p> <p>This action is only available when you have specified an override bill to address for this credit card.</p>
Actions	Description
Charge	This action lets you charge the payment amount in the Charge screen.
Delete	This action deletes the payment information belonging to a certain payment type. An alert window pops up confirming the deletion of the payment type. Click OK and the payment type is deleted.
Fields	Description
Payment Type	The payment type. For example, Credit Card.
Charge Sequence	<p>When multiple payment types are specified, Charge Sequence specifies the default payment type.</p> <p>For example, if a Buyer uses a gift certificate and a credit card, by specifying the Charge Sequence of gift certificates as 1 and credits cards as 2, you can collect against any gift certificates before the credit card is collected against.</p> <p>Note: The charge sequence configured for this payment type overrides any value entered in this field. However, if two configured charge sequences have the same sequence number, the value entered in this field is used as a tie breaker.</p>
Collected Amount	The amount of the return that has been collected against this payment type.
Refunded Amount	The amount of the return that has been refunded against this payment type.

Table 32. Return Payment Information Screen, Credit Card (continued)

Credit Card #	The credit card number. Note: If encryption is turned on, credit card numbers are displayed with asterisks (*) for the first 12 digits, unless you have permissions to view decrypted primary payment attributes.
Unlimited Charges	Select Unlimited Charges if the payment type has no charge limit.
Authorized Amount	The amount that has been authorized to collect with this payment type.
Expiration Date	The expiration date on the credit card. This field may be encrypted.
Max Charge Limit	The maximum amount this payment type can be charged.
Awaiting Collections	The amount waiting to be collected against this payment type.
Credit Card Type	The type of credit card, such as VISA or MasterCard.
Awaiting Authorizations	The amount waiting to be authorized.
Name On Card	The name exactly as it appears on the card. Note: The field can be encrypted, if the user does not have permission to view the name.
Payment Type Status	This field provides the current status of the payment type. <ul style="list-style-type: none"> • Suspended for Charge - If selected, payment collections are frozen, but refunds can still be performed for the specified payment type. Reactivate payment collections by choosing Active. • Suspended for Charge and Refund - If selected, payment collections and refund credits are frozen for the specified payment type. Reactivate payment collections and refunds by choosing Active. • Active - If selected, payments can be collected and credits can be refunded for the specified payment type.

The actions and the payment type status are the same in all the panels. However the primary information for each payment type differs.

Return Payment Information Screen, Customer Account

Table 33. Return Payment Information Screen, Customer Account

Actions	Description
For the list of actions refer to the Return Payment Information Screen, Credit Card table.	
Fields	Description
Payment Type	The payment type. For example, Credit Card or Check.

Table 33. Return Payment Information Screen, Customer Account (continued)

Charge Sequence	When multiple payment types are specified, Charge Sequence specifies the default payment type. For example, if a Buyer uses a gift certificate and a credit card, by specifying the Charge Sequence of gift certificates as 1 and credits cards as 2, you can collect against any gift certificates before the credit card is collected against. Note: The charge sequence configured for this payment type overrides any value entered in this field. However, if two configured charge sequences have the same sequence number, the value entered in this field is used as a tie breaker.
Collected Amount	The amount of the return that has been collected against this payment type.
Refunded Amount	The amount of the return that has been refunded against this payment type.
Customer Account #	The Buyer's account number. If encryption is turned on, this field displays only the last four digits of the customer account number, unless you have the necessary permissions.
Unlimited Charges	Select Unlimited Charges if the payment type has no charge limit.
Authorized Amount	The amount that has been authorized to collect with this payment type.
Customer PO #	The purchase order number placed for the return.
Max Charge Limit	The maximum amount this payment type can be charged.
Awaiting Collections	The amount waiting to be collected against this payment type.
Payment Reference #1	This field can be customized as needed. If encryption is turned on, this field displays only the last four digits of the Payment Reference number, unless you have the necessary permissions.
Payment Reference #2	This field can be customized as needed.
Awaiting Authorizations	The amount waiting to be authorized.
Payment Type Status	Refer to the Return Payment Information Screen, Credit Card table for the payment type status details.

Return Payment Information Screen, Stored Value Card

Table 34. Return Payment Information Screen, Stored Value Card

Actions	Description
	For the list of actions refer to the Return Payment Information Screen, Credit Card table.
Fields	Description
Payment Type	The payment type, for example, gift card.
Stored Value Card #	The stored value card number. Note: If encryption is turned on, SVC numbers displayed with asterisks (*) for all but the last four digits, unless you have permissions to view decrypted primary payment attributes.

Table 34. Return Payment Information Screen, Stored Value Card (continued)

Charge Sequence	<p>When multiple payment types are specified, Charge Sequence specifies the default payment type.</p> <p>For example, if a Buyer uses a gift certificate and a credit card, by specifying the Charge Sequence of gift certificates as 1 and credits cards as 2, you can collect against any gift certificates before the credit card is collected against.</p> <p>Note: The charge sequence configured for this payment type overrides any value entered in this field. However, if two configured charge sequences have the same sequence number, the value entered in this field is used as a tie breaker.</p>
Collected Amount	The amount of the return that has been collected against this payment type.
Refunded Amount	The amount of the return that has been refunded against this payment type.
Payment Reference #1	<p>This field can be customized as needed.</p> <p>If encryption is turned on, this field displays only the last four digits of the Payment Reference number, unless you have the necessary permissions.</p>
Unlimited Charges	<p>Select Unlimited Charges if the payment type has no charge limit.</p> <p>This field does not displayed if the ChargeUpToAvailable flag has been enabled in the Applications Manager.</p>
Authorized Amount	The amount that has been authorized to collect with this payment type.
Payment Reference #2	This field can be customized as needed.
Max Charge Limit	The maximum amount this payment type can be charged.
Awaiting Collections	The amount waiting to be collected against this payment type.
Payment Reference #3	This field can be customized as needed.
Awaiting Authorizations	The amount waiting to be authorized.
Funds Available	Amount of funds available on this card. This field displays 'Not Applicable' if the query to get available funds has been disabled.
Payment Type Status	Refer to the Return Payment Information Screen, Credit Card table for the payment type status details.

Return Payment Information Screen, Other

Table 35. Return Payment Information Screen, Other

Actions	Description
	For the list of actions refer to the Return Payment Information Screen, Credit Card table.
Fields	Description
Payment Type	The payment type. For example, Check.

Table 35. Return Payment Information Screen, Other (continued)

Charge Sequence	When multiple payment types are specified, Charge Sequence specifies the default payment type. For example, if a Buyer uses a gift certificate and a credit card, by specifying the Charge Sequence of gift certificates as 1 and credits cards as 2, you can collect against any gift certificates before the credit card is collected against. Note: The charge sequence configured for this payment type overrides any value entered in this field. However, if two configured charge sequences have the same sequence number, the value entered in this field is used as a tie breaker.
Collected Amount	The amount of the return that has been collected against this payment type.
Payment Reference #1	This field can be customized as needed. If encryption is turned on, this field displays only the last four digits of the Payment Reference number, unless you have the necessary permissions.
Unlimited Charges	Select Unlimited Charges if the payment type has no charge limit.
Authorized Amount	The amount that has been authorized to collect with this payment type.
Payment Reference #2	This field can be customized as needed.
Max Charge Limit	The maximum amount this payment type can be charged.
Awaiting Collections	The amount waiting to be collected against this payment type.
Payment Reference #3	This field can be customized as needed.
Awaiting Authorizations	The amount waiting to be authorized.
Payment Type Status	Refer to the Return Payment Information Screen, Credit Card table for the payment type status details.

Add Order Payment Information

You can add one or more payment types to collect against an return.

If the payment type selected is in the credit card payment type group, the following fields are displayed:

Table 36. Add Order Payment Information Screen, Credit Card Payment Type

Fields	Description
Charge Sequence	When multiple payment types are specified, Charge Sequence specifies the default payment type. For example, if a Buyer uses a gift certificate and a credit card, by specifying the Charge Sequence of gift certificates as 1 and credits cards as 2, you can collect against any gift certificates before the credit card is collected against.
Credit Card #	Enter the credit card number.
Unlimited Charges	Select the Unlimited Charges if the payment type has no charge limit.
Expiration Date	Enter the expiration date on the credit card.

Table 36. Add Order Payment Information Screen, Credit Card Payment Type (continued)

Fields	Description
Max Charge Limit	Enter the maximum amount that can be collected against this payment type.
Credit Card Type	Enter the type of credit card, such as VISA or MasterCard.
Name On Card	Enter the name exactly as it appears on the card.
Override Bill To Address	Check this box to override the bill to address on the order. For more information about address details, refer to Table 177 on page 116.

If the payment type belongs to customer account payment type group, the following fields are displayed.

Table 37. Add Order Payment Information Screen, Customer Account Payment Type

Fields	Description
Charge Sequence	When multiple payment types are specified, Charge Sequence specifies the default payment type. For example, if a Buyer uses a gift certificate and a credit card, by specifying the Charge Sequence of gift certificates as 1 and credits cards as 2, you can collect against any gift certificates before the credit card is collected against.
Customer Account #	The Buyer's account number. If encryption is turned on, this field displays only the last four digits of the customer account number, unless you have the necessary permissions.
Unlimited Charges	Select Unlimited Charges if the payment type has no charge limit.
Customer PO #	The purchase order number placed for the return.
Max Charge Limit	Enter the maximum amount that can be charged against this payment type.
Payment Reference #1	This field can be customized as needed.
Payment Reference #2	This field can be customized as needed.

If the payment type is check or others then both payments fall under the Others payment type group. The field descriptions of both payment types are same.

Table 38. Add Order Payment Information Screen, Check or Other Payment Type

Fields	Description
Charge Sequence	When multiple payment types are specified, Charge Sequence specifies the default payment type. For example, if a Buyer uses a gift certificate and a credit card, by specifying the Charge Sequence of gift certificates as 1 and credits cards as 2, you can collect against any gift certificates before the credit card is collected against.
Payment Reference #1	This field can be customized as needed.
Unlimited Charges	Select Unlimited Charges if the payment type has no charge limit.
Payment Reference #2	This field can be customized as needed.

Table 38. Add Order Payment Information Screen, Check or Other Payment Type (continued)

Fields	Description
Max Charge Limit	Enter the maximum amount that can be collected against this payment type.
Payment Reference #3	This field can be customized as needed.

If the payment type selected is in the Stored Value Card (SVC) payment type group, then the following fields are available:

Table 39. Add Order Payment Information Screen, Stores Value Card Payment Type

Fields	Description
Charge Sequence	When multiple payment types are specified, Charge Sequence specifies the default payment type. For example, if a Buyer uses a gift certificate and a credit card, by specifying the Charge Sequence of gift certificates as 1 and credits cards as 2, you can collect against any gift certificates before the credit card is collected against.
Unlimited Charges	Select Unlimited Charges if the payment type has no charge limit. This field is not displayed if the ChargeUpToAvailable flag has been enabled in the Applications Manager.
Payment Reference #1	This field can be customized as needed.
Max Charge Limit	Enter the maximum amount that can be collected against this payment type.
Payment Reference #2	This field can be customized as needed.
Payment Reference #3	This field Can be customized as needed.

Click Save after entering the necessary information for adding a payment types. The Return Payment Information screen is populated with the added payment types.

Create Credit Memo

You can create a credit memo to add additional credit charges to an return.

Table 40. Create Credit Memo Screen, Credit Memo Details

Fields	Description
Amount	Enter the amount for which you wish to create the credit memo.
Reference	Enter the reference number.

Create Debit Memo

You can create a debit memo to add additional credit charges to an return.

Table 41. Create Debit Memo Screen, Debit Memo Details

Fields	Description
Amount	Enter the amount for which you wish to create the debit memo.
Reference	Enter the reference number.

Collection Details

You can view collection details associated with an return.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

Table 42. Collection Details Screen, Collection Details

Fields	Description
Total Collected	The amount of credit collected.
Total Invoiced	The amount the Buyer account has been debited or charged.
Total Refunded	The amount that has been refunded on the return.
Return Invoiced Amount	The amount that has been invoiced for a return charge for an return.
Total Cancelled	The amount for which cancellation has been done on return lines on an return.
Funds From Return	<p>The total funds that can potentially be transferred from the return that originated the exchange.</p> <p>The funds from the return are broken down as follows:</p> <ul style="list-style-type: none">• Total Transferred: The total of the funds that have been transferred from the return.• Pending Transfer: The total of the funds that have not yet been transferred from the return. <p>Note: This field is only displayed for exchange orders.</p>

Table 43. Collection Details Screen, Invoice Collection Information

Fields	Description
Invoice #	The invoice number.
Invoice Date	The date and time that the invoice was created.
Amount Collected	The amount that has currently been paid towards the invoice.
Total Invoice Amount	The total amount of the invoice.

There are two views in this screen. One is the Charge and Authorization Summary View and the other is the Advanced Collection Details. Use the drop-down menu to select either one of the option. In the Charge view only the transaction types

CHARGE related details would be available. If you want to view the adjustments due to refunds, change of prices, choose the Advanced Collection Detail view.

If you click on the Expand All button, the charge transaction details for each charge transaction are expanded. If you click on the Collapse All button, the charge transaction details for each charge transaction are collapsed.

The following Collection Summary panel provides field descriptions for both the views.

Table 44. Collection Details Screen, Collection Summary

Fields	Description
Date	The date that authorization/charging or adjustments was carried out.
Transaction Type	<p>The transaction type for which the payment authorization or charge was carried out.</p> <p>When you expand the transaction types the following payment information can be viewed:</p> <ul style="list-style-type: none"> • Customer Account Information Expanded • Credit Card Information Expanded • Stored Value Card Information Expanded • Payment Type Information Expanded <p>The transaction type in the case of advanced collection details are: Adjustments, Change Price etc.,</p>
Open Order	The remaining amount to be collected on the return.
Authorized	The amount that has been authorized.
Pre Settled Amount	The amount that has been pre-settled.
Invoiced	The amount that is owed by the Buyer to the Enterprise.
Collected	The amount collected on the transaction.
Pending Execution	The amount that is pending authorization.
Status	Indicates if the collection is still OPEN, CHECKED or CLOSED.

Table 45. Customer Account Information Expanded

Fields	Description
Payment Type	The payment type.
Customer Account #	<p>The customer account #.</p> <p>If encryption is turned on, this field displays only the last four digits of the customer account number, unless you have the necessary permissions.</p>
Customer PO #	The purchase order number placed for the return.
Payment Reference #1	<p>This field can be customized as needed.</p> <p>If encryption is turned on, this field displays only the last four digits of the Payment Reference number, unless you have the necessary permissions.</p>
Payment Reference #2	This field can be customized as needed.

Table 45. Customer Account Information Expanded (continued)

Fields	Description
Authorization ID	The authorization ID necessary to begin authorization of the credit card.
Authorization Expiration Date	The date the payment must be collected by before the amount has to be manually authorized again.
Pending Execution Amount	The amount that is pending authorization.
Authorization Code	The authorization code.
Authorization AVS	AVS Authorization code.
Authorization Message	Authorization message.

Table 46. Credit Card Information Expanded

Fields	Description
Payment Type	The payment type i.e. credit card.
Credit Card #	The credit card number. If encryption is turned on, this field only displays the last four digits of the credit card number if you do not have the necessary permissions.
Expiration Date	The expiration date on the credit card.
Credit Card Type	The type of credit card, such as VISA or MasterCard.
Name on Card	The name exactly as it appears on the card. Note: The field can be encrypted, if the user does not have permission to view the name.
Authorization ID	The authorization ID necessary to begin authorization of the credit card.
Authorization Expiration Date	The date the payment must be collected by before the amount has to be manually authorized again.
Pending Execution Amount	The amount that is pending authorization.
Authorization Code	The authorization code.
Authorization AVS	AVS Authorization code.
Authorization Message	Authorization message.
CVV Authorization Code	CVV Authorization code.

Table 47. Stored Value Card Information Expanded

Fields	Description
Payment Type	The payment type i.e. gift card.
Stored Value Card #	The stored value card number. If encryption is turned on, this field only displays the last four digits of the stored value card number if you do not have the necessary permissions.
Payment Reference #1	This field can be customized as needed. If encryption is turned on, this field displays only the last four digits of the Payment Reference number, unless you have the necessary permissions.
Payment Reference #2	This field can be customized as needed.
Payment Reference #3	This field can be customized as needed.

Table 47. Stored Value Card Information Expanded (continued)

Fields	Description
Authorization ID	The authorization ID necessary to begin authorization of the credit card.
Authorization Expiration Date	The date the payment must be collected by before the amount has to be manually authorized again.
Pending Execution Amount	The amount that is pending authorization.
Authorization Code	The authorization code.
Authorization AVS	AVS Authorization code.
Authorization Message	Authorization message.

Table 48. Payment Type Information Expanded

Fields	Description
Payment Type	The payment type i.e. check.
Payment Reference #1	This field can be customized as needed. If encryption is turned on, this field displays only the last four digits of the Payment Reference number, unless you have the necessary permissions.
Payment Reference #2	This field can be customized as needed.
Payment Reference #3	This field can be customized as needed.
Authorization ID	The authorization ID necessary to begin authorization of the credit card.
Authorization Expiration Date	The date the payment must be collected by before the amount has to be manually authorized again.
Pending Execution Amount	The amount that is pending authorization.
Authorization Code	The authorization code.
Authorization AVS	AVS Authorization code.
Authorization Message	Authorization message.

Charge

You can manually enter an amount to be charged with a particular payment type.

Table 49. Charge

Fields	Description
Authorization ID	Enter the authorization ID for the charge.
Code	Enter a code for the charge.
Expiration Date	Enter the expiration date for the charge.
Amount	Enter the amount being charged.

Related Orders

If the return was created off of an order, you can view the original order it was derived from.

A derived order is associated with a parent order yet the lifecycle of one order does not necessarily impact the lifecycle of the other order. A return order derived from a sales order and an exchange order derived from a return order are both examples of derived orders.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

Table 50. Related Orders Screen, Sales Order Lines

Actions	Description
View Details	This action takes you to the Order Details screen where you can perform actions on the order. For more information about this screen, see the <i>Sterling Selling and Fulfillment Foundation: Distributed Order Management User Guide</i> .
Fields	Description
Order #	The sales order number related to this return. Click this link to view the order details.
Relationship	The relationship of the sales order with this return.
Status	The status of the sales order. Click this link to view the Order Status Breakup screen. For more information about this screen, see the <i>Sterling Selling and Fulfillment Foundation: Distributed Order Management User Guide</i> .
Buyer	The buyer organization of this order.
Seller	The seller organization of this order.

If there is any exchange order for this return the following fields are displayed.

Table 51. Related Orders Screen, Exchange Order For This Return

Fields	Description
Order #	The sales order number related to this return. Click this link to view the order details. For more information about this screen, see the <i>Sterling Selling and Fulfillment Foundation: Distributed Order Management User Guide</i> .
Exchange Type	The type of the exchange. For example, Regular is a valid exchange type.
Status	The status of the exchange order.
Enterprise	The enterprise organization of this exchange order.
Buyer	The buyer organization of this exchange order.
Seller	The seller organization of this exchange order.
Funds From Return	The total funds that can potentially be transferred from the return that originated the exchange. The funds from the return are broken down as follows: <ul style="list-style-type: none"> • Total Transferred: The total of the funds that have been transferred from the return. • Pending Transfer: The total of the funds that have not yet been transferred from the return.
Line #	The line number in the exchange order.
Date	The date the order line was added.

Table 51. Related Orders Screen, Exchange Order For This Return (continued)

Fields	Description
Item ID	The item ID and its description associated with the exchange order.
Description	
Product class	The product class of the item.
UOM	The unit of measure for the item.
Quantity	The quantity of the item ordered.
Amount	The amount of the order.
Status	The status of the exchange order.

Return Dates

You can view any custom dates that have been configured for monitoring. For more information about monitoring, see the *Sterling Selling and Fulfillment Foundation: Reverse Logistics Configuration Guide*.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

Table 52. New Dates

Fields	Description
Date Type	The custom date type.
Requested	The date on which the date type is requested to be met.
Expected	The date on which the date type is expected to be met.
Actual	The date on which the date type actually needs to be met.

Authorize Return

If the return node has been configured as requiring authorization, you can use the Authorize action to authorize the return. When a return is authorized it moves from the awaiting authorization status to the next applicable status in the Application Console.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

Table 53. Authorize Return Screen, Comments

Fields	Description
Contact Time	The most recent date and time the customer was contacted.
Contact Type	The type of contact. For example, Email contact.
Contact User	The user who contacted the customer.
Contact Reference	The reference number for the contact.
Reason Code	The contact reason code.
Add Note	Enter any notes as needed concerning the authorization of the return.
Date	Automatically records the date the note was entered.

Table 53. Authorize Return Screen, Comments (continued)

Fields	Description
User	Automatically records login ID of the user that entered the note.
Contact Type	The type of contact. For example, Email contact.
Contact Reference	The reference number for the contact.
Transaction Name	Automatically records the transaction performed when the note was entered.
Notes	Stores any previous notes entered by users.

Table 54. Authorize Return Screen, Authorization Details

Fields	Description
Authorize Drop Status	Select Authorized to authorize a return. Select Not Authorized to keep the return in the Awaiting Authorization status. If any alerts have been configured upon non-authorization of a return, they are sent out.
Line	The return line number being authorized. Click this link to view the Return Line Detail screen.
Item ID	The item ID of the return item being authorized.
PC	The return item's product class.
UOM	The return item's unit of measure.
Return To Node	The node handling the return line.
Tag #	This column displays only if the item is tag-controlled. The column label that displays is the name of the unique identifier you have defined (for example, Lot #). If you have defined more than one unique identifier, the label that displays is Tag #. To view the details associated with the inventory batch number the return line belongs to, click the hypertext link.
Quantity	The quantity of the item being returned in the return line.

Associate Service Request

On this screen, you can view the service requests that can be associated with the order line.

Table 55. Associate Service Request Screen, Return Line

Fields	Description
Return #	The return number.
Line #	The line number of the product item on the order.
Line Quantity	The line quantity of the product item.
Item ID	The item identifier of the product item.
Unit Of Measure	The unit of measure of the product item.
Product Class	The product class of the product item.
Description	The description of the product item.
Status	The current status of the return line.

Table 55. Associate Service Request Screen, Return Line (continued)

Fields	Description
Receiving Node	The node that is receiving the product.
Return To Node	The node that is handling the return.
Requested Ship Date	The date on which the product item is requested to be shipped.
Options	<p>The Options table displays only when a service request has optional services such as clean up or old appliance removal.</p> <ul style="list-style-type: none"> • Option Checkbox - Choose the checkbox of the services you want to enable. • Option ID - Displays the identifier of the service request option. • Description - Displays the short description of the service request option. • Price - Displays the price of the service request option..

Table 56. Associate Service Request Screen, Service Requests

Fields	Description
Item ID	The unique identifier of the service.
UOM	The unit of measure of the service.
Item Description	The description of the service.
Price	The price of the service.

Associated Service Requests

You can view the service items that are associated with a product item in this screen.

For more information about the return line header field level descriptions, see Table 55 on page 53.

Table 57. Associated Service Requests Screen, Return Line

View Icon	Description
Add Provided Service	Add Service Requests - This icon takes you to the Associate Service Request screen where you can add the required service requests associated with the product line.

Table 58. Associated Service Requests Screen, Service Requests

Action	Description
Cancel	This action enables you to cancel the selected service requests. In the Modification Reason screen that pops up, enter the reason code and reason text for cancelling the service request.
Fields	Description
Line	The line of the service. Click this link to view the Service Request Details screen.
Item ID	The unique identifier of the service.
Item Description	The description of the service.

Table 58. Associated Service Requests Screen, Service Requests (continued)

Appointment	The date and time of the service.
Service Offset (Hrs)	The number of hours the service is offset by.
Amount	The amount of the service.
Status	The current status of the service.

Associate Pickup Request

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

Table 59. Associate Pickup Request Screen, Pickup Request

Fields	Description
Return To Node	The node handling the return.
Ship To Address	The ship-to address on the return.
Receiving Node	The node receiving the product.
Line	The product item's line number on the order.
Item ID	The product item's ID.
PC	The product item's product class.
UOM	The unit of measure for the product item.
Description	Displays the description of the product item.
Options Table	<p>The Options table displays only when a pickup request has any optional services available, such as clean up or old appliance removal.</p> <ul style="list-style-type: none"> • Option Checkbox - Choose the checkbox of the services that you want to enable. • Option ID - Displays the ID of the pickup request option. • Description - Displays the short description of the pickup request option. • Price - Displays the price of the pickup request option..

Add Pickup Request

Items that cannot be transported by common carriers (for example, heavy, oversized, or fragile items) can be associated with a pickup service through the Applications Manager. Piano pickup is an example of a pickup service.

Typically, in the Application Console, items that need an associated pickup service are indicated by a **Delivery Item** icon.

Pickup lines cannot be split. However, you can split a product line that has associated pickup service, which results in the following recalculations:

- Pickup line quantity
- Pricing
- Capacity requirements for the pickup line

When you create pickup requests, you are associating pickup items (intangible services) with product items (tangible items).

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

One table appears for each set of items that have the same Ship Node, Receiving Node, and Ship To Address.

Add Pickup Request Screen, Pickup Request

Table 60. Add Pickup Request Screen, Pickup Request

Fields	Description
Item ID	The pickup request's ID.
UOM	The unit of measure for the pickup request.
Description	Displays the description of the pickup request.

Order Entry

Exchange orders are created to replace product items that are being returned through a return order. For that reason, an exchange order can be only be created from an existing return order.

To create an exchange order from the Return Detail action bar, click Create Derived Return Order. The Order Entry screen appears.

Table 61. Order Entry

Fields	Description
Document Type	Select the type of order document you are creating. For example, Sales Order or Transfer Order.
Enterprise	Select the Enterprise that is to handle the order.
Buyer	Enter the Buyer placing the order.
Seller	Enter the Seller that the order is being placed from.
Order #	Enter the order number.
Type	This field can be customized as needed.
Date	Enter the date the is placed.
Order Name	The name of the exchange order.
Currency	Select the currency with which any are to be handled in.
Exchange Type	Select the type of the exchange order from the drop-down list.

After entering the necessary information click Create Order and you are taken to the order detail screen.

View Holds On Returns

Returns can be placed on hold, preventing them from being processed by certain transactions, and preventing certain modification types from being applied. Using the Applications Manager, you can configure which transactions and modification types are disallowed for a return on a particular hold type. Additionally, hold types can be configured to be applied automatically. For instance on return creation

or upon resolution of another hold. For more information about defining and configuring hold types, see the *Sterling Selling and Fulfillment Foundation: Distributed Order Management User Guide*.

The order header field descriptions can be referred from the Return table.

Table 62. View Holds Screen, Order Holds

View Icons	Description
View History	This icon takes you to the View History screen, where you can view the hold's history.
Action	Description
Add Holds	This action takes you to the Add Holds To Returns screen, where you can add holds to a return.
Fields	Description
Hold Type	The description of the hold.
Hold Status	The status of the hold. Holds can either be in created, resolved, or rejected status.
Hold Comment	The reason for applying this hold to the return, or changing the status of the hold.
Action	Select from the drop-down list the status to which you want to move this hold.
Reason	Enter the reason for changing the status of this hold.

Table 63. View Holds Screen, Resolved Holds

View Icons	Description
View History	This icon takes you to the View History screen, where you can view the hold's history.
Fields	Description
Hold Type	The description of the hold.
Reason	The reason for changing this hold to resolved status.

Click Save to update the changes made in the screen, and close it.

Add Holds To Returns

You can add a hold to a return, if that hold is not already being applied to the return in created or rejected status. If you add a hold that was previously applied and now in resolved status, it removes that hold from the list of approved holds, and reset its status to created. That hold remains its previous history records for that order, and further status modifications are added on to that history.

Table 64. Add Holds Screen, Order Holds

Fields	Description
Hold Type	Select the hold type you want to apply to the return from the drop-down list.
Reason	Enter the reason for adding this hold to the return.

Click Save to close this screen and apply the selected hold to the return.

View History

Every time the status of an order hold changes, useful information regarding the status change is recorded in Sterling Selling and Fulfillment Foundation. You can view, in this screen, the history of an order hold.

The order header field descriptions can be referred from the Return table.

Table 65. View History Screen, Order Holds

Fields	Description
Hold Type	The hold type for which the history is being displayed.
Date/Time	The date and time when the hold's status changed.
User ID	The user who performed the change on the hold.
Status	The status that the hold was moved to.
Comment	The reason for the hold's creation or status change, if applicable.
Hold Transaction	The transaction responsible for the hold's status change.

Work Order Entry Screen

You can create a work order if an order line has an associated Delivery Service.

The return work orders do not contain provided services.

Table 66. Work Order Entry Screen, Header Details

Fields	Description
Enterprise	The name of the enterprise that owns the work order.
Work Order #	Enter the work order number.
Ship Node	If the work order contains a provided service, this designates the ship node from which the resource is originating. If the work order contains a delivery service and no provided service, this designates the ship node from which the product is being delivered.
Multiple Appointments	Check this if you are using multiple appointments for this work order.

Table 67. Work Order Entry Screen, Delivery Services

Fields	Description
Line	The order line number.
Item ID	The ID of the delivery service item.
Description	The description of the delivery service item.
Ship Node	The node from which the product is being delivered.
Line Qty	The quantity of work (distance, time, or an arbitrary unit) required to deliver the product.

Table 68. Work Order Entry Screen, Products Being Delivered

Fields	Description
Line	The order line number.
Item ID	The ID of the product being delivered.
PC	The product class of the product being delivered.
UOM	The unit of measure of the product being delivered.
Description	The description of the product being delivered.
Ship Node	The ship node that the product is being delivered from.
Required Quantity	The quantity of the product being delivered.

Once you enter the details and click Create Work Order you are taken to the Work Order Details screen to plan appointments, check resource availability to perform the tasks.

Return Status Breakup

The status breakup enables you to view the status of a return. A return can be in multiple statuses at the same time. For example, one return line can be in Created status while another return line is in the Released status.

To view a return's status breakup in the Return Detail screen, choose the Status link. The Return Status Breakup window appears.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

Table 69. Return Status Breakup Screen, Return Lines by Status

Field	Description
Line	The return line number. Click this link to view the Return Line Status Breakup details.
Item ID	The item ID.
PC	The item classification such as first quality, second quality, or finished good.
UOM	The line item's unit of measure.
Return To Node	The node handling the return.
Last Changed On	The date the line last had a status change.
Status	The current status for that part of the return line.
Quantity	The quantity of the line item returned. This field can be modified.
Tag #	This column displays only if the item is tag-controlled. The column label that displays is the name of the unique identifier you have defined (for example, Lot #). If you have defined more than one unique identifier, the label that displays is Tag #. To view the details associated with the return line, click the hypertext link.

Return Refund Summary

You can view any charges, taxes, and discounts that have been applied to the base amount of an return at both the header and line level.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

Table 70. Return Refund Summary Screen, Summary

Fields	Description
Summary	<p>The summary panel provides the price, discount, charges and taxes for an return and the return line.</p> <p>You can view all of the charges that exist against a return by selecting Overall.</p> <p>You can view only the charges that are still open against the return by selecting Open.</p> <p>You can view only the charges that have been invoiced for the return by selecting Invoiced.</p> <p>Important: If you have selected the Overall view, be aware that the amounts displayed are subject to change due to cancellations, over-shipments, over-receipts, and so on.</p>
Price	The price at the header and line levels before any discounts, charges, or taxes have been applied to it.
Total Charges	Any additional charges at the header and line levels. Click the link under the Header level row to view the return charges and select the link under Line level to view the line charges. This link takes you to different screens based on the type of summary selected.
Taxes	Any additional taxes at the header and line levels. Click the link under the Header level row to view the return taxes and select the link under Line level to view the line taxes. This link takes you to different screens based on the type of summary selected.
Totals	The total of Price, Discount, Charges, and Taxes at the header and line levels.

A line summary inner panel displays prices on a line level. If there are any pickup request charges, a pickup request summary inner panel also displays with details regarding any price-related information regarding pickup requests.

Table 71. Return Refund Summary Screen, Line Summary

Fields	Description
Line #	The line number. Click this link to view the Return Line Detail screen.
Item ID	The item ID.
PC	The item classification such as first quality, second quality, or finished good.
UOM	The item's unit of measure.
Quantity	The quantity of the line item that has been returned.

Table 71. Return Refund Summary Screen, Line Summary (continued)

Fields	Description
Unit Price	The price of the line item.
Extended Price	The extended price represents the total of quantity multiplied by the unit price.
Fees	The fee applied to the associated line. Click the hyperlink to view the Overall Return Charges, and Invoiced Return Charges.
Charges	The total charges applied the associated line. Click the hyperlink to view the Overall Return Charges, and Invoiced Return Charges.
Tax	The total taxes applied to the return line. Click the hyperlink to view the "Overall Return Charges," Remaining Return Taxes and .
Line Total	The total cost of the return line after any additional charges, taxes, and fees have been applied.

Table 72. Return Refund Summary Screen, Service Request or Delivery Request Summary

Fields	Description
Line Number	The service or delivery request's line number. Click this link to view the appropriate request detail screen.
Item ID	The service or delivery request's item ID.
UOM	The service or delivery request's unit of measure.
Quantity	The service or delivery request's quantity requested.
Unit Price	The service or delivery request's unit pricing.
Extended Price	The service or delivery request's extended price.
Option Price	The price of any additional service options associated with the service or delivery request.
Discount	The service or delivery request's discount. Click this link to view the appropriate line charges.
Charges	The service or delivery request's charges. Click this link to view the appropriate line charges.
Taxes	The service or delivery request's taxes. Click this link to view the appropriate line taxes.
Line Total	The service or delivery request's line grand total charges.

Overall Return Charges

You can view the header level charges of an return.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

Table 73. Charge Category

Fields	Description
Charge Category	The name of the charge category.
Charge Name	The name of the charge.

Table 73. Charge Category (continued)

Fields	Description
Charge Amount	The amount of charge applied at the header level.

Overall Return Taxes - You can view the header level tax information associated with a return.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

Table 74. Return Taxes Screen, Taxes

Fields	Description
Charge Category	The charge category associated with the tax. Important: You must associate a return header level tax with a charge. Otherwise, it is calculated as 0. Note: You cannot apply a return header level tax to a price value.
Charge Name	The charge name associated with the tax. Important: You must associate a return header level tax with a charge. Otherwise, it is calculated as 0. Note: You cannot apply a return header level tax to a price value.
Charge Amount	The charge amount that is taxed.
Tax Name	The name of the tax. For example, International Tax.
Tax Percentage	The percentage of tax applied to the header price.
Tax Amount	The amount of tax applied to the header level.

- **Remaining Return Charges** - You can use the Remaining Return Charges Detail window for adding or modifying the return charges.
Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.
- **Adding Remaining Return Charges** - From the Charges table, choose the **Add** icon. A new row appears in the Charges table. From the Charge Category drop-down list, select the category of the new charge.

This drop-down displays all return charges and discount charges. Consult your system administrator to determine which charges should be used as return charges.

Table 75. Remaining Charges

Fields	Description
Charge Category	The name of the charge category. Select the appropriate charge category from the drop-down list.
Charge Name	The name of the charge. Once you select the charge category, this field is populated with a drop-down list. Select the appropriate charge name.
Charge Amount	The amount of charge applied at the header level.

Click Save after making changes to the charges panel to update the remaining return charges. The Return Modification Reason screen appears. Enter the appropriate reason code and text, and click OK.

- **Modifying Remaining Return Charges** - Locate the charges you want to modify. In the charges panel enter the amount of the charges and click Save. The Return Modification Reason screen appears, enter the appropriate reason code and text and click OK.

Remaining Return Taxes

You can use the Remaining Return Taxes window for adding or modifying the return taxes.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

This drop-down displays all return charges and discount charges. Consult your system administrator to determine which charges should be used as return charges.

- **Adding Remaining Return Taxes** - From the Taxes panel, choose the **Add** icon. A new row appears in the Taxes panel. From the Charge Category drop-down list, select the category of the new charge and from Tax category select a new tax name and enter the relevant information as defined in the following table.

Table 76. Remaining Taxes

Fields	Description
Charge Category	The name of the charge category. Select the appropriate charge category from the drop-down list.
Charge Name	The name of the charge. Once you select the charge category, this field is automatically populated with a drop-down list. Select the appropriate charge name from the list.
Charge Amount	The amount of charge applied at the header level.
Tax Name	The name of the tax. For example, International Tax.
Tax Percentage	The percentage of tax applied to the header price.
Tax Amount	The amount of tax applied at the header level.

Click Save after making changes to the taxes panel to update the remaining return taxes. The Return Modification Reason screen appears. Enter the appropriate reason code and text, and click OK.

- **Modifying Remaining Return Taxes** - Locate the taxes you want to modify. In the taxes panel, enter the amount of the taxes and click Save. The Return Modification Reason screen appears. Enter the appropriate reason code and text, and click OK.

Invoiced Return Charges

You can view the invoice level charges of a return.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen. If you view the invoiced return charges from the Return Invoices screen the return header panel is replaced with fields described in the Invoices table.

Table 77. Charge Category

Fields	Description
Charge Category	The name of the charge category.
Charge Name	The name of the charge.
Charge Amount	The amount of charge applied at the header level.

Invoiced Return Taxes -You can view the invoice level tax information associated with an return.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen. If you view the invoiced return charges from the Return Invoices screen the return header panel is replaced with fields described in the Invoices table.

Table 78. Return Taxes Screen, Taxes

Fields	Description
Charge Category	The charge category associated with the tax. Important: You must associate a return header level tax with a charge. Otherwise, it is calculated as 0. Note: You cannot apply a return header level tax to a price value.
Charge Name	The charge name associated with the tax. Important: You must associate a return header level tax with a charge. Otherwise, it is calculated as 0. Note: You cannot apply a return header level tax to a price value.
Charge Amount	The charge amount that is taxed.
Tax Name	The name of the tax. For example, International Tax.
Tax Percentage	The percentage of tax applied to the header price.
Tax Amount	The amount of tax applied to the header level.

Add Order Line - You can add any line from an order document that is in Shipped status to the return release. To add an order line, from the Return Detail screen, return order lines panel select Add Order Line and this screen pops open.

You can only add orders lines from orders that have the same Seller, Buyer, currency, and Enterprise as the original order associated with the return.

Table 79. Enter Order Number

Field	Description
Enterprise	The enterprise of the associated order line.
Order #	The order number associated with an order line that can be added to this return. Select the lookup icon to search for orders. The Order List Lookup screen appears. Select the relevant orders and click Select For Return.

Enter the Order # and click OK to return to the Returnable Order Lines screen. In this screen, select the orders that can be added to this return order.

Table 80. Returnable Order Lines Screen, Returnable Order Lines

Fields	Description
Line	The return line number being authorized.
Item ID	The the item ID of the return item being authorized.
PC	The return item's product class.
UOM	The return item's unit of measure.
Description	The return item's description.
Tag #	This column displays only if the item is tag-controlled. The column label that displays is the name of the unique identifier you have defined (for example, Lot #). If you have defined more than one unique identifier, the label that displays is Tag #. To view the details associated with the inventory batch number the return line belongs to, click the hypertext link.
Ship By Date	The date by which the return item should be shipped.
Available To Return	The quantity of the return item available to be returned.
Return Qty	Enter the quantity of the item being returned in the return line.
Line Type	From the drop-down, select the line type.
Reason Code	From the drop-down, select the reason for the item being returned.
Return To Node	Enter the node handling the return line.

Select the order lines that you want to add to the return order and click Save.

Return Line Detail

You can view the return line details by selecting the return lines in the Return Detail screen and clicking View Details.

Table 81. Return Line Detail Screen, Return Line

View Icons	Description
Order Releases	Releases - This icon takes you to the Return Line Releases screen where you can view the list of order releases based on the release number, ship node and status.
Instructions	Instructions - This icon lets you view the Return Line Releases screen where you can add, modify or delete the instructions for a order line.
Kit Components	Kit Components - This icon takes you to the Kit Components where you can view the kit components associated with the order line.
Address	More Addresses - This icon takes you to the More Return Line Addresses screen where you can add or modify forwarding address.

Table 81. Return Line Detail Screen, Return Line (continued)

Additional Attributes	Item Attributes - This icon takes you to the Item Attributes screen where you can specify additional attributes for item and delivery.
Return Receipt History	Receipt History - This icon takes you to the Receipt Detail screen where you can view the receipts associated with this return line.
Chained Orders	Related Orders - This icon lets you view the Related Order Lines screen. For example you can view the Return Orders created from the order console by clicking this icon.
Shipment Data Types	Order Line Dates - This icon takes you to the Return Line Dates screen to view the requested, expected and actual date type for the given order line.
Work Orders	View Work Orders - This icon takes you to the Work Order Details screen where you can view the related work orders associated with this order line.
Audit	Return Line Audits - This icon takes you to the Return Line Audits screen where you can view the list of audits done for that order line.
Fields	Description
Return #	The return number associated with the return line. Click this link to view the Return Detail.
Line #	The return line number.
Line Quantity	The quantity of the return line item returned. This field can be modified.
Item ID	The item ID. Click this link to view the ship node details. For more information about this screen, see the <i>Sterling Selling and Fulfillment Foundation: Global Inventory Visibility User Guide</i> .
Unit of Measure	The line item's unit of measure.
Product Class	The item classification such as first quality, second quality, or finished good.
Description	A brief description of the line item. This field can be modified.
Status	The current status of the return line. Click this link to view the Return Line Status Breakup screen.
Return to Node	The node handling the return.

The charges and taxes panel are defined below the return line panel.

This panel displays all order fees, charges and taxes against the overall, open and invoiced prices.

Table 82. Return Line Detail Screen, Charges and Taxes

Fields	Description
Extended Price	The total of quantity multiplied by unit price.
Option Price	The price of any additional options associated with the item ordered.

Table 82. Return Line Detail Screen, Charges and Taxes (continued)

Fields	Description
Discount	The discount price applied to the associated line. Click the hyperlink to view the Overall Return Line Charges, Remaining Return Line Charges and Invoiced Return Line Charges.
Charges	The total charges applied the associated line. Click the hyperlink to view the Overall Return Line Charges, Remaining Return Line Charges and Invoiced Return Line Charges.
Tax	The total taxes applied to the order line. Click the hyperlink to view the Overall Return Line Taxes, Remaining Return Line Taxes and Invoiced Return Line Taxes.
Totals	The total amount of the associated line after any charges and taxes have been applied.

Refer to the Return From table for field value descriptions of the Return From panel.

Table 83. Return Line Detail Screen, Additional Attributes

Fields	Description
Unit Price	The price of the line item listed by the Seller.
Customer PO #	The customer's purchase order number.
Carrier/Service	The carrier (such as UPS) and service (such as Ground or Next Day Air) that originally shipped the return line. This field can be modified.
Is Returnable	Indicates that this item is configured to be a returnable item as per your business practices.
Return Window (Days)	Indicates how many days a customer or Buyer has to return the line item after receiving it, as per your business practices.
Credit w/o Receipt	Indicates whether credit can be issued to the customer before physically receiving the return line item.
Invoiced Qty	The quantity of the line item that has been added to a return invoice.
Over Receipt Qty	The quantity of the line item that can be received over the quantity the customer plans to return.
Return Reasons	The reasons the return line items are being returned.
Shipped Quantity	The quantity shipped in the return.
Received Quantity	The quantity received in the return.
Fulfillment Type	The fulfillment type is used to determine if there are any custom requirements used to determine sourcing locations associated with this return.

Table 84. Return Line Detail Screen, Pickup Attributes

Fields	Description
Pickup Method	The method in which this order line reaches its final destination: <ul style="list-style-type: none"> • Delivery - specialized carrier services, such as piano movers. • Pickup - hold items for the customer to retrieve. • Shipping - typical carrier services, such as UPS.
Carrier Account #	The Carrier organization's account number with your organization. This field can be modified.
Associated Pickup Line Number	The line number and link to the associated pickup service order line, if applicable.
Shipping Paid By	The organization that pays for shipping the return line. This field can be modified.
Carrier/Service	The carrier (such as UPS) and service (such as Ground or Next Day Air) for the return line. This field can be modified.
Freight Terms	The freight terms used by the carrier. This field can be modified.

Enter any information in the return line details screen and click Save to update the changes.

Return Line Releases

If some or all of the line has been released, you can view a list of releases including the line.

To view line releases, from the Return Lines action bar, choose the **Order Releases** icon. The Return Line Releases window appears.

Table 85. Return Line

Fields	Description
Return #	The return number associated with the return line. Click this link to view the Return Detail.
Line #	The return line number.
Line Quantity	The quantity of the return line item returned.
Item ID	The product item's ID. Click this link to view the inventory details for the item. For more information about screen reference, see the <i>Sterling Selling and Fulfillment Foundation: Global Inventory Visibility User Guide</i> .
UOM	The line item's unit of measure.
Product Class	The item classification such as first quality, second quality, or finished good.
Description	A brief description of the line item.
Status	The current status of the return line. Click this link to view the Return Line Status Breakup screen.
Return To Node	The node handling the return.

Table 85. Return Line (continued)

Fields	Description
Exchange Type	Select the exchange type from the drop-down list. The option of changing the type of an exchange is only available when the order is in Draft Order Created status. Once the order is confirmed, you are not able to edit this field. Note: This field is only displayed for exchange orders.
Created For Return #	The return order number for which the exchange was created. Click on the hyperlink to see that return order. Note: This field is only displayed for exchange orders.

Table 86. Return Line Releases Screen, Return Releases

Action	Description
View Details	This action takes you to the Return Release Details screen, where you can perform activities associated with return releases.
Fields	Description
Release #	The line release number. Click this link to view the Return Release Details screen.
Return To Node	The node handling the return. Click this link to view the Ship Node Details. For more information about this screen, see the <i>Sterling Selling and Fulfillment Foundation: Distributed Order Management User Guide</i> .
Status	The current status of the return release. Click this link to view the Return Release Status Breakup screen.

Return Line Instructions

You can add special instructions, such as packaging or handling instructions, to a specific line item.

Refer to the Return Line table for more information about field descriptions of the return line header panel seen in this screen.

Table 87. Instructions Window

Action	Description
Delete Instruction	This action enables you to delete the selected instructions. Upon clicking this action, an alert window appears to confirm the deletion of instructions.
Fields	Description
Instruction Type	The type of instruction, such as Gift, Pick, Pack, Ship, or Other.
Text	The specific instructions to be performed on the order. Specify the instruction URL next to the Instructions URL icon.

You can also use the Instructions window for:

- **Adding an Instruction** - You can add instructions that add a customer's notes to each return line. Instructions are created to inform the individual responsible for

packing the return of the Buyer's special requests. Select the **Add** icon to add the instruction lines and enter the relevant information in the fields as discussed in the Instructions table.

- **Modify an Instruction** - The information in the Return Line Instructions screen can be modified by entering the modified information and selecting Save.

Kit Components

If the return line item is a kit item. You can view the component items that make up the kit.

To view kit components from the Return Lines action bar, choose the **Kit Components** icon. The Kit Components window is displayed. Refer to the Return Line table for more information about field descriptions of the return line header panel seen in this screen.

Table 88. Kit Components

Fields	Description
Kit Code	The item's kit code such as physical kit, logical kit or dynamic physical kit
Item ID	The kit item's ID. Click this link to view the ship node details. For more information about this screen, see the <i>Sterling Selling and Fulfillment Foundation: Global Inventory Visibility User Guide</i> .
PC	The kit item's classification such as first quality, second quality, or finished good.
UOM	The kit item's unit of measure.
Description	A brief description of the kit item.
Qty Per Kit	The quantity of the item per one kit.
Component Quantity	The total quantity of components in the return line.

More Return Line Addresses

You can view any additional addresses that pertain to a line as per your business practices. For more information about defining additional address types, see the *Sterling Selling and Fulfillment Foundation: Reverse Logistics Configuration Guide*.

Table 89. More Return Line Addresses

View Icon	Description
Address Details	Address Details - Choose this icon to view or modify the return line addresses. For more information about the screen that is displayed, see Organization Address Details Screen.
	The name and address of the person or organization where the return is addressed.

Item Attributes

You can view Item Attributes of an order line by clicking the **Additional Attributes** icon in the Return Line Detail screen.

Refer to the Return Line table for more information about field descriptions of the return line header panel seen in this screen.

Table 90. Item Attributes Screen, Item Attributes

Fields	Description
Classifications	This panel is described in the "Item Attributes Screen, Classifications" table.
Other Attributes	This panel is described in the "Item Attributes Screen, Other Attributes" table.
Customer Item	The customer's item ID.
Customer Item Description	The customer's item description.
Manufacturer Item	The manufacturer's item ID.
Manufacturer Item Description	The manufacturer's item description.
Supplier Item	The supplier's item ID.
Supplier Item Description	The supplier's item description.

Table 91. Item Attributes Screen, Classifications

Fields	Description
NMFC Class	The NMFC Class.
NMFC Code	The NMFC code.
NMFC Description	The NMFC description.
ISBN	The ISBN number.
Harmonized Code	The harmonized code.
Tax Product Code	The tax product code.
ECCN No	The ECCN number.
Schedule B Code	The schedule B code.
UPC Code	The UPC code.

Table 92. Item Attributes Screen, Other Attributes

Fields	Description
Country/Region of Origin	The country or region the item is manufactured in.
Import License No	The import license number.
Import License Validity	The date the import license is valid through.
Product Line	The product line.
Manufacturer	The item's manufacturer.
Unit Cost	The manufacturer's price per unit.
Item Weight	The item's weight.
Item Weight UOM	The weight unit of measure used for the item.

Enter necessary information in the fields and click Save.

Receipt Detail

You can view the list of receipts associated with a return line in this screen.

Refer to the Return Line table for more information about field descriptions of the return line header panel seen in this screen.

Table 93. Receipt Detail Screen, Return Receipt Lines

Action	Description
View Details	This action takes you to the Return Order Receipt Summary screen, where you can perform activities associated with return receipts.
Fields	Description
Line #	The line number of the return receipt.
Receipt #	The receipt number. Click this link to view the Return Order Receipt Summary screen.
Serial #	The serial number associated with this receipt line.
Lot #	The lot number associated with this receipt line.
Ship By Date	The date by which the item has to be shipped.
Qty	The quantity of the items in the receipt.
Disposition	The disposition method entered when creating the receipt.
User	The user who created the receipt.
Comments	The comments entered by the user.

Related Order Lines

To view an order line's chained order lines, from the Return Line Detail action bar, choose the **Chained Orders** icon. The Related Orders window including any lines the specific line is chained to or derived from is displayed.

Refer to the Return Line table for more information about field descriptions of the return line header panel seen in this screen.

Table 94. Related Orders Screen, Sales Order Lines

Actions	Description
View Details	This action takes you to the Order Details screen where you can perform actions on the order. For more information about this screen, see the <i>Sterling Selling and Fulfillment Foundation: Distributed Order Management User Guide</i> .
Fields	Description
Order #	The sales order number related to this return line. Click this link to view the order details.
Relationship	The relationship of the sales order with this return line.
Status	The status of the sales order. Click this link to view the Order Status Breakup screen. For more information about this screen, see the <i>Sterling Selling and Fulfillment Foundation: Distributed Order Management User Guide</i> .
Buyer	The buyer organization of this order.
Seller	The seller organization of this order.

Return Line Dates

You can view any custom dates that have been configured for monitoring. For more information about monitoring, see the *Sterling Selling and Fulfillment Foundation: Reverse Logistics Configuration Guide*.

You can view return line dates of a return line by clicking the **Shipment Data Types** icon in the Return Line Detail screen.

Refer to the Return Line table for more information about field descriptions of the return line header panel seen in this screen.

Table 95. New Dates

Fields	Description
Date Type	The custom date type.
Requested	The date on which the date type is requested to be met.
Expected	The date on which the date type is expected to be met.
Actual	The date on which the date type actually needs to be met.

Click Save to update the new dates.

Return Line Audits

You can view audits logged against a return line. An audit is logged against a Return line when any type of modification is made to the Order line.

Refer to the Return Line table for more information about field descriptions of the return line header panel seen in this screen.

Table 96. Return Line Audits Screen, Return Line Audits

Action	Description
View Details	This action takes you to the Return Audit Details screen for the selected order lines.
Fields	Description
Order Created in Sterling	The date and time the return was created in our system.
Audit #	The audit identification number. Click the audit identification number to view the Return Audit Details screen.
Date	The date and time the modification was carried out.
Modified By	The user that performed the modification.
Reason	The reason the modification occurred and additional information explaining the modification entered by the user.
Modification type	The type of modification performed.

Return Line Status Breakup

You can view the return line's breakup by status in this screen. Click the Status link in the Return Detail screen to view the status breakup.

Refer to the Return Line table for more information about field descriptions of the return line header panel seen in this screen.

Table 97. Return Line Status Breakup Screen, Status Breakup

Field	Description
Last Changed On	The last date on which the status was changed.
Status	The current status of the return line.
Quantity	The quantity of the return line.

Overall Return Line Charges

You can view the header level charges of a return line in this screen.

Refer to the Return Line table for more information about field descriptions of the return line header panel seen in this screen.

Table 98. Overall Return Line Charges Screen, Charges

Fields	Description
Quantity	The quantity of the line item that has been returned.
Unit Price	The price of the line item. This field can be modified.
Extended Price	The total of quantity * unit price.
Charge Category	The name of the discount category.
Charge Name	The name of the discount charge.
Per Unit	The amount of the discount charge applied to an individual line item.
Per Line	The amount of the discount charge applied to the entire return line.
Charge Amount	The amount of the discount charge that is applied to the return line level. Note: During invoicing, this charge is applied to the first shipment received, in the case of multiple shipments.

Overall Return Line Taxes

You can view the header level tax information associated with a return line.

Refer to the Return Line table for more information about field descriptions of the return line header panel seen in this screen.

Table 99. Overall Return Line Taxes Screen, Taxes

Fields	Description
Ordered Quantity	The quantity of the line item that has been returned.
Pricing UOM	The pricing's unit of measure.
Unit Price	The price of the line item.
Extended Price	The total of quantity * unit price.

Table 99. Overall Return Line Taxes Screen, Taxes (continued)

Fields	Description
Apply to Price	Select Apply To Price to create a tax that applies to the unit price of the line Note: A line tax can be applied to either a charge or the price. If you select Apply To Price, charges are not accessible.
Charge Category	The charge category with which the tax is associated. Important: A return header level tax must be associated with a charge, otherwise it is calculated as 0. Note: An return header level tax cannot be applied to a price value.
Charge Name	The charge name with which the tax is associated. Important: An return header level tax must be associated with a charge, otherwise it is calculated as 0. Note: An return header level tax cannot be applied to a price value.
Charge Amount	The charge amount that is taxed.
Tax Name	The name of the tax. For example, International Tax.
Tax Percentage	The percentage of tax that is applied to the header price.
Tax Amount	The amount of the tax that is applied to the header level.

Remaining Return Line Charges

You can view specific line level charges details in this screen.

Refer to the Return Line table for more information about field descriptions of the return line header panel seen in this screen.

Table 100. Remaining Return Line Charges Screen, Charges

Field	Description
Open Quantity	The quantity of the line item that has been returned.
Pricing UOM	The pricing's unit of measure.
Unit Price	The price of the line item. This field can be modified.
Extended Price	The total of quantity * unit price.
Charge Category	The category of the charge.
Charge Name	The name of the charge.
Per Unit	The amount of the charge applied to an individual line item.
Per Line	The amount of the charge applied to the entire return line.
Charge Amount	The amount of the charge that is applied to the return line level.

You can also use the Remaining Return Line Charges window for:

- **Adding Remaining Return Line Charges** - From the Charges table, choose the **Add** icon. A new row appears in the Charges table. From the Charge Category drop-down list, select the category of the new charge.

This drop-down displays all return charges and fees. Consult your system administrator to determine which charges should be used as return charges and which should be used as fees.

Click Save after making changes to the charges panel to update the remaining order charges. The Modification Reason screen appears, enter the appropriate reason code and text and click OK.

- **Modifying Remaining Return Line Charges** - Locate the charges you want to modify. In the charges panel enter the amount of the charges and click Save. The Modification Reason screen appears, enter the appropriate reason code and text and click OK.

Remaining Return Line Taxes

You can add or modify the open return line taxes in this screen.

Refer to the Return Line table for more information about field descriptions of the return line header panel seen in this screen.

Table 101. Remaining Return Line Taxes Screen, Taxes

Field	Description
Remaining Quantity	The quantity of the line item that has been returned.
Pricing UOM	The pricing's unit of measure.
Unit Price	The price of the line item.
Extended Price	The total of quantity * unit price.
Apply to Price	Select Apply To Price to create a tax that applies to the unit price of the line Note: If you select Apply To Price, you cannot select a charge name because you can create a tax that applies to the price or a tax on the existing line charge.
Charge Category	The charge category the tax is associated with, if applicable.
Charge Name	The charge name the tax is associated with, if applicable.
Charge Amount	The charge amount that is taxed, if applicable.
Tax Name	The name of the tax. For example, International Tax.
Tax Percentage	The percentage of tax that is applied to the return line price.
Tax Amount	The amount of the tax that is applied to the return line level.

- **Adding Remaining Return Line Taxes** - From the Taxes panel, choose the **Add** icon. A new row appears in the Taxes panel. From the Charge Category drop-down list, select the category of the new charge and from Tax category select a new tax name and enter the relevant information as defined in the table above.

This drop-down displays all order taxes and fee taxes. Consult your system administrator to determine which charges should be used as order taxes and which should be used as fee taxes.

Click Save after making changes to the taxes panel to update the remaining return taxes. The Modification Reason screen appears. Enter the appropriate reason code and text, and click OK.

- **Modifying Remaining Return Line Taxes** - Locate the taxes you want to modify. In the taxes panel enter the amount of the taxes and click Save. The Modification Reason screen appears. Enter the appropriate reason code and text, and click OK.

Invoiced Return Line Charges

You can view the invoice level charges of an return line.

Refer to the Return Line table for more information about field descriptions of the return line header panel seen in this screen.

Table 102. Invoiced Return Charges Screen, Charges

Fields	Description
Invoiced Quantity	The quantity of the line item that has been invoiced.
Pricing UOM	The pricing's unit of measure.
Unit Price	The price of the line item.
Extended Price	The total of quantity * unit price.
Charge Category	The name of the charge category.
Charge Name	The name of the charge name.
Per Unit	The amount of the charge applied to an individual line item.
Per Line	The amount of the charge applied to the entire return line.
Charge Amount	The amount of the charge that is applied to the header level.

Invoiced Return Line Taxes

You can view the invoice level tax information associated with an return line.

Refer to the Return Line table for more information about field descriptions of the return line header panel seen in this screen.

Table 103. Invoiced Return Taxes Screen, Taxes

Fields	Description
Quantity	The quantity of the line item that has been invoiced.
Unit Price	The price of the line item.
Extended Price	The total of quantity * unit price.
Apply To Price	Select Apply To Price to create a tax that applies to the unit price of the line Note: If you select Apply To Price, you cannot select a charge name because you can create a tax that applies to the price or a tax on the existing line charge.
Charge Name	The charge category and name the tax is associated with, if applicable.
Charge Amount	The charge amount that is taxed, if applicable.
Tax Name	The name of the tax. For example, International Tax.
Tax Percentage	The percentage of tax that is applied to the line price.
Tax Amount	The amount of the tax that is applied to the invoice's line.

Return Release Search By Status

You can search for return releases based on their status in this screen.

Do not use spaces before or after any text you enter in the search fields, as this may result in inconsistent or inaccurate results.

Table 104. Return Release Search by Status

Fields	Description
Document Type	Select the appropriate document type to search for, if applicable.
Enterprise	Choose the field and lookup option to find the specific Enterprise you want use. Or choose Across Enterprises to use of all the Enterprises.
Across Enterprises	Select this option if you are searching across all enterprises.
Return #	Enter the return number of the return releases you are searching for, if applicable.
Return Date	Enter the date range through which the return releases you are searching for were returned, if applicable.
Order #	Enter the order number from which the return releases you are searching for were created, if applicable.
Release #	Enter the release number of the return release you are searching for, if applicable.
Buyer	Enter the Buyer associated with the return releases you are searching for, if applicable.
Seller	Enter the Seller associated with the return releases you are searching for, if applicable.
Pickup Method	Select the pickup method used to get the product items to the recipient, if applicable.
Return Release Line Status	Select the status range of the return releases you want to search for, if applicable.
Return To Node	Enter the return node the return releases you are searching for was released to, if applicable.
Max Records	Enter the maximum number of return releases you want returned from your search.

The Return Release List is displayed as a result of this search.

Return Release List

The Return Release List window displays the results of a return release search. You can perform actions on a single return release or multiple return releases by selecting the check boxes of the return releases you want to perform an action on and choosing the applicable action from the action bar.

Table 105. Return Release List

Actions	Description
View Details	This action takes you to the Return Release Details screen where you can start the receipts, create shipments and view release details.
View More Addresses	This action takes to More Order Release Addresses screen where you can view additional addresses associated with the release.

Table 105. Return Release List (continued)

Create Shipment	This action creates a shipment for the return release and pops up the Return Shipment Details screen.
Fields	Description
Return #	The return number.
Release #	The return release number. Click this link to view the Return Release Details.
Status	The return release status.
Enterprise	The Enterprise organization associated with the return release.
Buyer	The Buyer organization that created the return.
Return Date	The date the return was created.
Return To Node	The node that is handling the return.

Return Release Details

You can view the details of the return releases in this screen.

Table 106. Return Release Details Screen, Return Release

View Icons	Description
Return Receipt	Receipts - This icon takes you to the Return Receipt List screen where you can view the list of receipts associated with this return line.
Address	More Addresses - This icon takes you to the More Order Release Addresses screen where you can add or modify return address.
Shipment Data Types	Return Release Dates - This icon takes you to the Return Release Dates screen to view the requested, expected and actual date type for the given release.
Shipments	Shipments - This icon takes you to the Return Release Shipments screen where you can view the list of shipments for the return release.
Actions	Description
Start Receipt	This action takes you to the "Start Receipt" on page 83 screen where you can create receipts for the returns.
Close Receipt	This action closes the receipt when you click OK in the alert screen that pops open to confirm the closing.
Create Shipment	This action creates the shipment for the releases and takes you to the Return Shipment Details for entering any details for the created shipment.
Report/Record Receipt	This action takes you to the Receive screen to receive any return lines in the receipt. If you do not have a receipt that is started, this action takes you to the "Start Receipt" on page 83 screen.
Fields	Description
Enterprise	The Enterprise associated with the return.
Buyer	The Buyer organization that created the return.
Seller	The Seller organization that is handling the return.

Table 106. Return Release Details Screen, Return Release (continued)

Return #	The return number. Click this link to view the Return Detail.
Status	The current status of the return. Click this link to view the Return Release Status Breakup screen.
Created On	The date the release was created.
Return Type	This field can be customized as needed.
Release #	The release number.
Ship Advice #	The ship advice number associated with this return.

Refer to the Return From table for the field descriptions of the Return From panel.

Table 107. Notes Screen, Notes

Fields	Description
Contact Time	The time at which this note was added to the work order. This is defaulted to the creation time of the Notes pop-up window.
Contact User	The user who created this note. This is defaulted to the logged on user.
Reason Code	The reason code for this note.
Contact Type	The type of contact information on this note, for example phone or e-mail.
Contact Reference	The contact information on this note. For example, if contact type is phone, the contact's phone number can be entered here. If contact type is e-mail, the contact's e-mail address can be entered.
Add Note	The note for this work order.

Table 108. Return Release Details Screen, Additional Attributes

Fields	Description
Return To Node	The return to node.
Delivery Method	The delivery method.
Work Order #	The work order number.
Appointment	The appointment date and time.

Table 109. Return Release Details Screen, Return Release Lines

Actions	Description
Receive	This action takes you to the Receive Return Line screen where you can receive the selected release lines.
Receive Kit	This action takes you to the Receive Return Line Kit screen where you can receive the selected release line kits.
Add Order Line	This action takes you to the screen where you can add the relevant order lines to the release.
Fields	Description
Line	The return release line number. Click this link to view the Return Line Detail.
Item ID	The item ID.

Table 109. Return Release Details Screen, Return Release Lines (continued)

PC	The item classification such as first quality, second quality, or finished good.
UOM	The item's unit of measure.
Description	A description of the item.
Description	A description of the return release line.
Reason Code	The reason the return release line was returned.
Line Type	The return release line type. For example, Credit is a line type.
Line Qty	The amount of line items that have not yet been scheduled and released. This field can be modified. Note: Entering '0' indicates a quantity of zero. Leaving this field blank indicates you want to ignore the line.
Status	The current status of the return line. Click this link to view the Return Line Status Breakup screen.

Return Release Receipts

You can view receipts created against return items that have been received by the return node. From the Return Release action bar, choose **Return Receipt** icon. The Return Receipts List screen appears.

Table 110. Return Release

Fields	Description
Enterprise	The Enterprise associated with the return.
Buyer	The Buyer organization that created the return.
Seller	The Seller organization that is handling the return.
Return #	The return number. Click this link to view the Return Detail.
Status	The current status of the return. Click this link to view the Return Release Status Breakup screen.
Created On	The date the release was created.
Return Type	This field can be customized as needed.
Release #	The release number.
Ship Advice #	The ship advice number associated with this return.

Table 111. Return Release Receipts

Action	Description
View Details	This action takes you to the Return Receipt Details screen for the selected return release receipts, where you can view the details of the receipts.
Fields	Description
Receipt #	The receipt number. Click this link to view the Return Receipt Details.
Receipt Date	The date the receipt was made.
Open	Indicates if the receipt is open or not. If it is still open the receipt could be waiting for additional items to be returned to begin inspection.

Table 111. Return Release Receipts (continued)

Number of Cartons	If the return items were shipped back in carton containers, this field indicates how many carton containers have been received.
Number of Pallets	If the return items were shipped back on pallet containers, this field indicates how many pallet containers have been received.

More Order Release Addresses

You can view any additional addresses that pertain to a release as per your business practices. To view a release's additional addresses from the Return Release action bar, choose the **Address Details** icon. The Additional Addresses window appears.

Refer to the Return Release table for more information about field descriptions of the return releases header panel seen in this screen.

Return Release Dates

You can view any custom dates that have been configured for monitoring. For more information about monitoring, see the *Sterling Selling and Fulfillment Foundation: Reverse Logistics Configuration Guide*.

You can view release dates of an return by clicking the **Shipment Data Types** icon in the Return Release Details screen.

Refer to the Return Release table for more information about field descriptions of the return releases header panel seen in this screen.

Table 112. New Dates

Fields	Description
Date Type	The custom date type.
Requested	The date on which the date type is requested to be met.
Expected	The date on which the date type is expected to be met.
Actual	The date on which the date type actually needs to be met.

Click Save to update the new dates.

Return Release Shipments

You can view the list of shipments created for a particular return release. You can view release shipments of an return by clicking the **Shipments** icon in the Return Release Details screen.

Refer to the Return Release table for more information about field descriptions of the return releases header panel seen in this screen.

Table 113. Return Release Receipts

Action	Description
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Table 113. Return Release Receipts (continued)

View Details	This action takes you to the Return Shipment Details screen for the selected return release shipments, where you can view the details of the shipment.
Fields	Description
Shipment #	The shipment number. Click this link to view the Return Shipment Details.
Shipper's Ref. #	The return shipment reference number.
Expected Ship Date	The expected shipment date of the release.
Ship Mode	The shipment mode. For more information, refer to the <i>Sterling Selling and Fulfillment Foundation: Reverse Logistics Configuration Guide</i> .
Return To Node	The return shipment's destination node.
Receive Node	The return shipment's receive node.
Status	The return shipment status.

Start Receipt

You can create a new receipt for return items received by the return node.

Table 114. Start Receipt

Field	
Receipt #	The receipt number from which items are being received.
Receiving Node	The node receiving the return.
Enterprise	The Enterprise associated with the return.
Order #	The order number of the order associated with the return.
Release #	The release number from which items are being received.
Pro #	
Receipt Date	Enter the date the return items are being received.
Buyer	The buyer associated with the return.
Seller	The seller associate with the return.
Number of Cartons	If the return items were shipped back in carton containers, enter how many carton containers have been received.
Number of Pallets	If the return items were shipped back on pallet containers, enter how may pallet containers have been received.

Enter the necessary information and click OK to start the receiving process.

Return Release Status Breakup

You can view a release's breakup by status.

To view a return release's status breakup choose the Status link from the Return Release Details screen. The Return Release Status Breakup screen appears.

Refer to the Return Release table for more information about field descriptions of the return releases header panel seen in this screen.

Table 115. Return Release Status Breakup

Fields	Description
Line #	The return release line number.
Item ID	The item ID.
PC	The item classification such as first quality, second quality, or finished good.
UOM	The line item's unit of measure.
Return To Node	The node handling the return.
Status	The current status for that part of the release line.
Quantity	The quantity of the line item returned. This field can be modified.
Tag #	This column displays only if the item is tag-controlled. The column label that displays is the name of the unique identifier you have defined (for example, Lot #). If you have defined more than one unique identifier, the label that displays is Tag #. To view the details associated with the return line, click the hypertext link.

Receive Return Line

You can create a receipt for an individual line item that is received at the return node from the Return Release Details screen.

Refer to the Return Line table for more information about field descriptions of the return line header panel seen in this screen.

Table 116. Notes Screen, Notes

Fields	Description
Contact Time	The time at which this note was added to the work order. This is defaulted to the creation time of the Notes pop-up window.
Contact User	The user who created this note. This is defaulted to the logged on user.
Reason Code	The reason code for this note.
Contact Type	The type of contact information on this note, for example phone or e-mail.
Contact Reference	The contact information on this note. For example, if contact type is phone, the contact's phone number can be entered here. If contact type is e-mail, the contact's e-mail address can be entered.
Add Note	The note for this work order.

Enter the relevant information and click Save to create the note.

Table 117. Receive Screen, Receipt Information

Fields	Description
Line #	The line number of the line being received.
Line Quantity	The original line quantity shipped to the Buyer.

Table 117. Receive Screen, Receipt Information (continued)

Fields	Description
Receivable Quantity	The quantity that is available to be received.
Item ID	The item ID of the items being received.
UOM	The line item's unit of measure.
Product Class	The line item's product class.
Description	A description of the line item.
Return Reasons	The reason the line item is being returned.
Line Type	The line type.
Serial #	Enter the serial number that is to be used to identify the receipt.
Tag #	This column displays only if the item is tag-controlled. The column label that displays is the name of the unique identifier you have defined (for example, Lot #). If you have defined more than one unique identifier, the label that displays is Tag #. To view the details associated with the inventory batch number the line item being received belongs to, click the hypertext link.
Ship By Date	Enter the date the line item being received had to be shipped to the Buyer by, if applicable.
Qty	Enter the quantity of the line item being received.
Disposition	Select the instructions on how to handle the return items. For example, Restock or Scrap.
Comments	Enter any additional comments regarding the receipt.

Enter the receipt information and click Save to update the changes.

Receive Return Line Kit

A kit is a group of items listed and priced together under a single item identification code. Once a kit has been received, the parent line is moved to Received as Component status and the kit lines are added.

For example, a gift basket with several individual items, such as fruits, candies, and flowers, that is identified by a single item identification code is a kit item.

You can create a receipt for an individual kit line item that is received at the return node.

Refer to the Return Line table for more information about field descriptions of the return line header panel seen in this screen.

Notes Screen, Notes

Table 118. Notes Screen, Notes

Fields	Description
Contact Time	The time at which this note was added to the work order. This is defaulted to the creation time of the Notes pop-up window.

Table 118. Notes Screen, Notes (continued)

Fields	Description
Contact User	The user who created this note. This is defaulted to the logged on user.
Reason Code	The reason code for this note.
Contact Type	The type of contact information on this note, for example phone or e-mail.
Contact Reference	The contact information on this note. For example, if contact type is phone, the contact's phone number can be entered here. If contact type is e-mail, the contact's e-mail address can be entered.
Add Note	The note for this work order.

Receive Kit Screen, Kit Components

Table 119. Receive Kit Screen, Kit Components

Fields	Description
Kit Details	<p>Click on the Plus icon to expand or collapse the following dynamic details for the corresponding kit item.</p> <ul style="list-style-type: none"> • Tag # - This column displays only if the item is tag-controlled. The column label that displays is the name of the unique identifier you have defined (for example, Lot #). If you have defined more than one unique identifier, the label that displays is Tag #. To view the details associated with the inventory batch number the line item being received belongs to, click the hypertext link. • Qty - Enter the quantity of the kit line item being received. • Disposition - Select the instructions on how to handle the returned items. For example, Restock or Scrap. • Comments - Enter any additional comments regarding the receipt.
Item ID	The kit item ID of the kit items being received.
UOM	The kit line item's unit of measure.
Description	A description of the kit line item.
Kit Qty	The amount of line items included in the kit.
Open For Receipt	Indicates if the return node handles receipt of this kit item.

Click Save to update the information entered.

Inspect Return Line

You can inspect the received quantity of a line and determine what should be done with the returned items as per your business practices.

Refer to the Return Line table for more information about field descriptions of the return line header panel seen in this screen.

Table 120. Notes Screen, Notes

Fields	Description
Contact Time	The time at which this note was added to the work order. This is defaulted to the creation time of the Notes pop-up window.
Contact User	The user who created this note. This is defaulted to the logged on user.
Reason Code	The reason code for this note.
Contact Type	The type of contact information on this note, for example phone or e-mail.
Contact Reference	The contact information on this note. For example, if contact type is phone, the contact's phone number can be entered here. If contact type is e-mail, the contact's e-mail address can be entered.
Add Note	The note for this work order.

Enter the relevant information and click Save to create the note.

Table 121. Inspect Return Line Screen, Inspect Line

Fields	Description
Line #	The line number of the line being inspected.
Line Quantity	The original line quantity shipped to the Buyer.
Inspectable Quantity	The quantity that is available to be inspected.
Item ID	The item ID of the items being inspected.
UOM	The line item's unit of measure.
Product Class	The line item's product class.
Description	The description of the item.
Serial #	The serial number that is to be used to identify the receipt.
Ship By Date	The date the line item being received had to be shipped to the Buyer by, if applicable.
Remaining Qty	The quantity of the line item remaining to be inspected.
Disposition	The instructions on how to handle the return items. For example, Restock or Scrap.
Comments	Enter any additional comments regarding the receipt.
New Disposition	If the method of handling the return changes after inspection, select the new disposition.
Disposition Qty	Enter the quantity of the line item inspected.
Disposition Comments	Enter any comments about the disposition of the line item.

Return Receipt Search by Receipt

You can search for the return receipts by the receipt serial numbers.

Do not use spaces before or after any text you enter in the search fields, as this may result in inconsistent or inaccurate results.

Table 122. Return Receipt Search by Receipt

Fields	Description
Document Type	Select the appropriate document type to search for, if applicable.
Enterprise	Choose the field and lookup option to find the specific Enterprise you want use. Or choose Across Enterprises to use of all the Enterprises.
Across Enterprises	Select this option if you are searching across all enterprises.
Receiving Node	Enter the receiving node you are searching for, if applicable.
Receiving Dock	Enter the receiving node associated with the return receipts you want to search for, if applicable.
Receipt #	Enter the return receipt number of the return receipts you are searching for, if applicable.
Buyer	Enter the Buyer of the return receipts you want to search for, if applicable.
Seller	Enter the Seller of the return receipts you want to search for, if applicable.
Return #	Enter the return number of the return receipt you are searching for, if applicable.
Shipment #	Enter the shipment number, if applicable
Receipt Date	Enter the receipt date range of the return receipts you are searching for, if applicable.
Receipt Status	Enter the receipt status, if applicable.
Closed Receipts Only	Select to search only against closed receipts, if applicable.
Max Records	Enter the maximum number of return receipts you want returned from your search.

The Return Receipt List is displayed as a result of this search.

Return Receipt Search By Item

You can search for return receipts based on the product item in the order.

Do not use spaces before or after any text you enter in the search fields, as this may result in inconsistent or inaccurate results.

Table 123. Return Receipt Search By Item

Fields	Description
Document Type	Select the appropriate document type to search for, if applicable.
Enterprise	Choose the field and lookup option to find the specific Enterprise you want use. Or choose Across Enterprises to use of all the Enterprises.
Across Enterprises	Select this option if you are searching across all enterprises.
Receiving Node	Enter the receiving node you are searching for, if applicable.

Table 123. Return Receipt Search By Item (continued)

Fields	Description
Item ID	Enter the item ID to search for return receipts containing a specific item, if applicable.
Product Class	Select an item product class to search for return receipts containing an item that has a specific product class, if applicable.
Unit of Measure	Select an item unit of measure to search for return receipts containing an item that has a specific unit of measure, if applicable.
Serial #	The serial number to search for, if applicable.
Disposition Code	Select the disposition code you are searching for, if applicable.
Inspection Pending	Select checkbox to search for items that are pending for inspection.
Max Records	Enter the maximum number of return receipts you want returned from your search.

The Return Receipt List is displayed as a result of this search.

Return Receipt Search By Container

You can search for return receipts by the containers used in the shipping.

Do not use spaces before or after any text you enter in the search fields, as this may result in inconsistent or inaccurate results.

Table 124. Return Receipt Search By Container

Fields	Description
Document Type	Select the appropriate document type to search for, if applicable.
Enterprise	Choose the field and lookup option to find the specific Enterprise you want use. Or choose Across Enterprises to use of all the Enterprises.
Receiving Node	Enter the receiving node you are searching for, if applicable.
Pallet ID	Enter the pallet ID you are searching for, if applicable.
Case ID	Enter the case ID you are searching for, if applicable.
Max Records	Enter the maximum number of return receipts you want returned from your search.

The Return Receipt List is displayed as a result of this search.

Return Receipt List

The Return Receipt List window displays the results of a return receipt search. You can perform actions on a single receipt or multiple receipts by selecting the check boxes of the receipts you want to perform an action on and choosing the applicable action from the action bar.

Table 125. Return Receipt List

Actions	Description
View Summary	This action takes you to the Return Order Receipt Summary screen where you can view the summary of the receipt and inspect the returned items.
View Details	This action takes you to the Return Receipt Details screen to view the details of the return receipts.
Close Prereceipt	This action closes any of the prereceipts.
Close Receipt	This action closes any of the selected receipts.
Report/Record Receipt	This action takes you to the Receive screen to receive any return lines in the receipt. If you do not have a receipt that is started, this action takes you to the "Start Receipt" on page 83 screen.
Fields	Description
Receipt #	The receipt number associated with the return. Click this link to view the Return Order Receipt Summary.
Shipment #	The shipment number associated with the return.
Return #	The return number.
Enterprise	The Enterprise organization associated with the return.
Buyer	The Buyer organization that created the return.
Seller	The Seller organization of the return.
Receipt Start Date	The start date of the receipt process.
Receiving Node	The receiving node.
Receipt Open	Indicates whether the receipt is open or closed.
Status	The return pickup request status.

Return Order Receipt Summary

You can view the receipt summary of a return in this screen.

Table 126. Return Order Receipt

View Icons	Description
Additional Attributes	Details - This icon takes you to the Return Receipt Details screen where you can view the receipt details and inspect the items.
Instructions	Instructions - This icon lets you view the "Receipt Instructions" on page 93 screen where you can add, modify or delete the instructions for the receipts.
Audit	Status Audits - This icon takes you to the Receipt Status Audit screen where you can view the audit status of the receipts.
Return Receipt History	Expected Receipt - This icon takes you to the Expected Receipt screen where you can view the expected receipt lines associated with a receipt header.
Actions	Description
Close Receipt	This action closes any of the selected receipts.

Table 126. Return Order Receipt (continued)

Report/Record Receipt	This action takes you to the Receive screen to receive any return lines in the receipt. If you do not have a receipt that is started, this action takes you to the “Start Receipt” on page 83 screen.
Fields	Description
Receipt #	The receipt number.
Shipment #	The shipment number. Click this link to view the Return Shipment Details.
Enterprise	The Enterprise associated with the shipment.
Buyer	The Buyer organization that placed the return. Click this link to view the Organization Details.
Seller	The Seller organization that is handling the return. Click this link to view the Organization Details.
Receipt Start Date	The start date of the receipt.
Receiving Node	The node that received the receipt. Click this link to view the ship node detail. For more information about this screen, see the <i>Sterling Selling and Fulfillment Foundation: Distributed Order Management User Guide</i> .
Receipt Status	The status of the receipt. Click this link to view the Receipt Status Audit.
Receipt Open	Indicates if the receipt is still open.
No Of Pallets	Indicates the number of pallets.
No Of Cartons	Indicates the number of cartons.

You can view the associated items and perform some actions on the receipt in the Items panel.

Table 127. Return Order Receipt Summary Screen, Items

Action	Description
View Details	This action takes you to the Order Receipt Container screen for viewing the container details of the receipt items.
Inspect	This action takes you to the Inspect Return Receipt Details screen for inspecting the receipt items.
Fields	Description
Item ID	The return line item's item ID.
Item Description	The description of the receipt line item.
PC	The return line item's product class.
UOM	The return line item's unit of measure.
Disposition Code	The disposition code.
Return #	The return number to which the return line belongs.
Line #	The return line number.
Release #	The release number to which the return line belongs.
Tag	The tag number is displayed in this field. Click this link to view the “Receipt Line Details” on page 97.
Net Weight	The net weight of the item.
New Weight UOM	The net weight of the unit of measure of the item.

Table 127. Return Order Receipt Summary Screen, Items (continued)

Quantity	The quantity of the receipt line.
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Return Receipt Details

You can view the receipt details associated with a return.

Table 128. Receipt

Fields	Description
Receipt #	The receipt number.
Shipment #	The shipment number. Click this link to view the Return Shipment Details.
Enterprise	The Enterprise associated with the shipment.
Buyer	The Buyer organization that placed the return. Click this link to view the Organization Details.
Seller	The Seller organization that is handling the return. Click this link to view the Organization Details.
Receipt Start Date	The start date of the receipt.
Receiving Node	The node that received the receipt. Click this link to view the ship node detail. For more information about this screen, see the <i>Sterling Selling and Fulfillment Foundation: Distributed Order Management User Guide</i> .
Receipt Status	The status of the receipt. Click this link to view the Receipt Status Audit.
Receipt Open	Indicates if the receipt is still open.
No Of Pallets	Indicates the number of pallets.
No Of Cartons	Indicates the number of cartons.

Table 129. Return Receipt Details Screen, Receipt Lines

Action	Description
View Details	This action takes you to the Order Receipt Container screen for viewing the container details of the receipt items.
Inspect	This action takes you to the Inspect Return Receipt Details screen for inspecting the receipt items.
Fields	Description
Item ID	The return line item's item ID.
Item Description	The description of the receipt line item.
PC	The return line item's product class.
UOM	The return line item's unit of measure.
Disposition Code	The disposition code.
Return #	The return number to which the return line belongs.
Line #	The return line number.
Release #	The release number to which the return line belongs.
Ship By Date	The item's expiration date.
COO	The country or region of origin.

Table 129. Return Receipt Details Screen, Receipt Lines (continued)

Serial #	The item's serial number.
Tag	The tag number is displayed in this field. Click this link to view the "Receipt Line Details" on page 97.
Quantity	The quantity of the receipt line.

Receipt Instructions

You can view the view special receipt instructions associated with a return.

Refer to the Receipt table for more information about field descriptions of the receipt header panel seen in this screen.

Table 130. Instructions Window

Action	Description
Delete Instruction	This action enables you to delete the selected instructions. Upon clicking this action, an alert window appears to confirm the deletion of instructions.
Fields	
Instruction Type	The type of instruction, such as Gift, Pick, Pack, Ship, or Other.
Text	The specific instructions to be performed on the order. Specify the instruction URL next to the Instructions URL icon.

You can also use the Instructions window for:

- **Adding an Instruction** - You can add instructions that add a customer's notes to each receipt summary. Instructions are created to inform the individual responsible for instructing the return of the Buyer's special requests. Select the **Add** icon to add the instruction lines and enter the relevant information in the fields as discussed in the Instructions table.
- **Modify an Instruction** - The information in the Receipt Instructions screen can be modified by entering the modification and selecting Save.

Receipt Status Audit

You can view the receipt status audit associated with a return.

Refer to the Receipt table for more information about field descriptions of the receipt header panel seen in this screen.

Table 131. Receipt Status Audits Screen, Status Audit List

Fields	Description
Modified By	The login ID of the person who performed the modification.
Old Status	The status prior to the modification.
Old Status Date	The date the prior status was updated.
New Status	The new status.
New Status Date	The date the new status was updated.

Table 131. Receipt Status Audits Screen, Status Audit List (continued)

Fields	Description
Reason Code	The reason code for the receipt status modification.
Reason Text	The reason text for the receipt status modification.

Expected Receipt

You can view the expected receipt lines associated with a return in this screen.

Refer to the Receipt table for more information about field descriptions of the receipt header panel seen in this screen.

Table 132. Expected Receipt Screen, Expected Receipt Lines

Fields	Description
Shipment Line	The shipment line of the receipt. If there is no shipment created for this receipt, then this field value is 0.
Return #	The return number associated with the receipt.
Release #	The release number associated with the receipt.
Item ID	The item ID.
Unit of Measure	The item's unit of measure.
Product Class	The item's product class.
Expected Quantity	The quantity that is expected to be received.
Received Quantity	The actual quantity that is received.

Order Receipt Container

You can view the item containers in this screen. You can view this screen by selecting the item details in the Return Order Receipt Summary screen.

Table 133. Order Receipt Containers Screen, Item Header

Fields	Description
Receipt #	The receipt number associated with the item.
Shipment #	The shipment number of this item.
Enterprise	The enterprise associated with the return receipt.
Receiving node	The node that is receiving the item.
Receipt status	The status of the receipt. For example Received.
Item ID	The item ID that is associated with the receipt.
Description	The description of the item.
PC	The product class of the item.
Unit of Measure	The unit of measure of the item.
Tag #	The tag number associated with the item.
Order #	The name of the order associated with the return receipt.
Line #	The order line number.
Release #	The release number of the order.

Table 134. Order Receipt Containers Screen, Item Containers

Fields	Description
Serial #	The serial number of the receipt.
Quantity	The number of containers being used in this receipt.

Inspect Return Receipt

You can enter the return receipt criteria in this screen.

Table 135. Inspect Receipt, Return Receipt

Fields	Description
Node	Select the node where the receipt has been received.
Enterprise	Select the enterprise associated with the return receipt.
Location	Enter the location where the receipt has been received. Choose lookup option to find the specific Location you want to search for.
Pallet ID	Enter the pallet LPN associated with the container.
Case ID	Enter the case LPN associated with the container.
Item ID	Enter the item ID you want to inspect associated with the receipt. Choose lookup option to find the specific Item ID you want to search for.
Product Class	Select the product class. Product class indicates the item's inventory categorization. Orders are placed for an item and product class. Typical examples are Irregular, FD (Factory Defects).
Unit Of Measure	Select the unit of measure you want to inspect.
Receipt #	Enter the return receipt number you want to inspect. Choose lookup option to find the specific Receipt Number you want to search for.
Serial #	Enter the item's serial number you want to inspect, if applicable.
Inventory Status	Select the inventory status of the receipt you want to inspect.

Click Proceed. The Inspect Return Receipt Details screen is displayed and you can view the return receipt's item details.

Inspect Return Receipt Details

Enter the inspection details for receipts that are pending for inspection. You can also view the return receipt items and receipts that are already inspected.

Table 136. Return Receipt Item

Fields	Description
Receipt #	The receipt number. Click this link to view the Return Order Receipt Summary.

Table 136. Return Receipt Item (continued)

Fields	Description
Shipment #	The shipment number. Click this link to view the Return Shipment Details.
Return #	The return number associated with this receipt.
Item ID	The receipt item's item ID.
PC	The receipt item's product class.
UOM	The receipt item's unit of measure.
Receipt Status	The status of the receipt. Click this link to view the Receipt Status Audit.
Receiving Node	The node that received the receipt. Click this link to view the ship node detail. For more information about this screen, see the <i>Sterling Selling and Fulfillment Foundation: Distributed Order Management User Guide</i> .

If you have not inspected the receipts the following panel is displayed to enter the inspection details for the receipt.

Table 137. Receipt Lines to Be Inspected

Fields	Description
Line	The receipt line number.
Serial #	The serial number.
Ship By Date	The date by which the inventory must be shipped.
Disposition	The disposition entered during accepting the return against the quantity.
Remaining Qty	The quantity against the disposition.
Comments	Comments entered, if any.
New Disposition	Select the new disposition details of the receipt.
Disposition Qty	Enter the quantity of the disposition against the receipt.
Disposition Comments	Enter the disposition comments, if any.

If you have lines that are already inspected, then the following panel is displayed providing information about the disposition history.

Table 138. Receipt Disposition History

Fields	Description
Line	The receipt line number that has already been inspected.
Serial #	The receipt serial number that has already been inspected.
Ship By Date	The date by which the inventory must be shipped.
Quantity	The receipt quantity that has already been inspected.
Disposition Code	The disposition code associated with the receipt quantity.
Inspection Date	The inspection date when the receipt was inspected.
User	The user that inspected the receipt.
Comments	The inspection comments for the receipt, if available.

Receive

If receipts are not available, the Start Receipt window appears. For more information about starting a receipt, see “Start Receipt” on page 83.

If multiple receipts are available, the Receive window appears. Select the check boxes of the applicable receipts you want to receive and choose the Proceed button.

Table 139. Receive, Receipt

Field	Description
Receipt #	The receipt number associated with the receipt.
Shipment #	The shipment number associated with the receipt.
Enterprise	The enterprise associated with the receipt.
Buyer	The buyer associated with the receipt.
Seller	The seller associated with the receipt.
Receipt Start Date	The receipt start date.
Receiving Node	The node that received the shipment.
Receipt Status	The receipt status.
Receipt Open	Indicates if the receipt is open.
No Of Pallets	The number of pallets.
No Of Cartons	The number of cartons.

Enter the relevant information and click Save to update the changes made to this screen.

Receipt Line Details

You can view the tag information for a receipt line in this screen. One of the way in which you can view this screen, is to click the Tag # field in the Return Receipt Details screen.

Table 140. Receipt Line Details Screen, Receipt Line Header

Fields	Description
Receipt #	The receipt number associated with the item.
Shipment #	The shipment number of this item.
Enterprise	The enterprise associated with the return receipt.
Receiving node	The node that is receiving the item.
Receipt status	The status of the receipt. For example Received.
Item ID	The item ID that is associated with the receipt.
Item Description	The description of the item.
PC	The product class of the item.
Unit of Measure	The unit of measure of the item.
Return #	The name of the return associated with the receipt.
Line #	The order line number.
Release #	The release number of the order.

Table 141. Receipt Line Details Screen, Tag Information

Fields	Description
Tag Identifiers	<p>Displays the unique tag identifiers you have specified for the item (for example, Lot #).</p> <ul style="list-style-type: none"> • Lot # - The Lot number associated with this tag identifier. • Batch # - The Batch number associated with this tag identifier. • Revision # - The Revision number associated with this tag identifier.
Tag Attributes	<p>Displays any descriptive identifiers you have specified (for example, Manufacture Date).</p> <ul style="list-style-type: none"> • Lot Key Reference - The Lot key reference associated with this tag attribute. • Manufacturing Date - The manufacturing date for this tag attribute. • Lot Attribute 1 - The lot attribute 1 with this tag attribute.

Pickup Request Search By All Attributes

You can search for pickup requests by all attributes in this screen.

Do not use spaces before or after any text you enter in the search fields, as this may result in inconsistent or inaccurate results.

Table 142. Return Pickup Request Search By All Attributes

Fields	Description
Document Type	Select the appropriate document type to search for, if applicable.
Enterprise	Choose the field and lookup option to find the specific Enterprise you want to use. Or choose Across Enterprises to use of all the Enterprises.
Return #	Enter the return number associated with the pickup request you are searching for, if applicable.
Buyer	Enter the Buyer associated with the return pickup requests you are searching for, if applicable.
Seller	Enter the Seller associated with the return pickup requests you are searching for, if applicable.
Item ID	Enter the item ID to search for orders containing a specific pickup service item, if applicable.
Appointment	Enter the appointment date range through which you want to search for pickup requests, if applicable.
Max Records	Enter the maximum number of pickup requests you want returned from your search.

The Pickup Request List screen is displayed as a result of this search.

Pickup Request Search By Draft Returns

You can search for draft pickup request returns in this screen.

Do not use spaces before or after any text you enter in the search fields, as this may result in inconsistent or inaccurate results.

Table 143. Return Pickup Request Search by Draft Returns

Fields	Description
Document Type	Select the appropriate document type to search for, if applicable.
Enterprise	Choose the field and lookup option to find the specific Enterprise you want use. Or choose Across Enterprises to use of all the Enterprises.
Return #	Enter the draft return number you are searching for, if applicable.
Buyer	Enter the Buyer associated with the draft returns you are searching for, if applicable.
Seller	Enter the Seller associated with the draft returns you are searching for, if applicable.
Buyer Account #	Enter the Buyer account number associated with the draft returns you are searching for, if applicable.
Max Records	Enter the maximum number of draft returns you want returned from your search.

The Pickup Request List screen displays as a result of this search.

Pickup Request List

The Return Pickup Request List window displays the results of a return pickup search. You can perform actions on one or more requests by selecting the check boxes of the requests you want to perform an action on and choosing the applicable action from the action bar.

Table 144. Pickup Request List

Actions	Description
View Details	This action takes you to the Pickup Request Details screen where you can view the details of the requests and the associated order lines for the selected pickup requests.
View Instructions	This action takes you to the Pickup Request Instructions screen where you can enter instructions for the selected pickup requests.
More Addresses	This action takes you to the More Pickup Request Addresses screen where you can add, modify or view additional addresses for the selected pickup requests.
Add Line	This action lets you add a product pickup to the request. For more information refer to Additional Product Lines.
Remove Line	This action removes the selected Draft pickup requests only.
Cancel	This action can be used to remove the selected pickup requests.

Table 144. Pickup Request List (continued)

Fields	Description
Order #	The sales order associated with the pickup request.
Line #	The line number of the pickup request in the sales order. Click this link to view the Pickup Request Details screen.
Enterprise	The enterprise owner of the order.
Appointment	This field provides the appointment date and time of the pickup request.
Total Amount	The total cost involved for this pickup request.

Pickup Request Details

The Pickup Request details screen displays all product items associated with a specific pickup request.

Table 145. Pickup Request Details Screen, Pickup Request

View Icons	Description
Work Orders	View Work Order - This icon takes you to the Work Order Details screen where you can view the related work order associated with this pickup request.
Instructions	Instructions - This icon lets you view the Pickup Request Instructions screen where you can add, modify the instructions for the pickup request.
Address	More Addresses - This icon takes you to the More Pickup Request Addresses screen where you can add or modify addresses.
Shipment Data Types	Pickup Request Dates - This icon takes you to the Pickup Request Dates screen to view the requested, expected and actual date type for the given request.
Chained Orders	Related Order Lines - This icon lets you view the Related Order lines screen. For example, you can view the sales order lines created from the order console by clicking this icon.
Actions	Description
Cancel	Select this action to cancel the pickup request. It pops up a Modification Reason screen where you should enter the reason and code before cancelling the pickup request.
Add Line	This action takes you to the Additional Product Lines screen where you can add any product lines to the pickup request.
Fields	Description
Return Number	The unique identifier of the order. Click this link to view the Return Detail screen.
Item ID	The pickup service item's ID.
Description	The description of the pickup service.
Appointment	The date and time of the pickup.
Line Number	The line number of the pickup service.
UOM	The units of measure in which the pickup service is calculated.
Ship Node	The node that performs the pickup.

Table 145. Pickup Request Details Screen, Pickup Request (continued)

Status	The status of the pickup request.
Line Quantity	The quantity used to measure the pickup service.
Document Type	The document type associated with the pickup request.

Table 146. Pickup Request Details Screen, Charges and Taxes

Fields	Description
All the fields are tabulated against the overall, open and invoiced prices.	
Extended Price	The total of quantity multiplied by unit price.
Option Price	The price of any additional options associated with the item ordered.
Discount	The discount price applied to the associated line. Click the hyperlink to view the Overall Pickup Request Charges, "Overall Pickup Request Charges" on page 103 and Invoiced Pickup Request Charges.
Charges	The total charges applied to the associated line. Click the hyperlink to view the Overall Pickup Request Charges, "Overall Pickup Request Charges" on page 103 and Invoiced Pickup Request Charges.
Tax	The total taxes applied to the order line. Click the hyperlink to view the "Invoiced Pickup Request Charges" on page 104, "Invoiced Pickup Request Charges" on page 104 and Invoiced Pickup Request Taxes.
Totals	The total amount of the associated line after any charges and taxes have been applied.

Table 147. Options

Fields	Description
The Options table displays only when a pickup service has any optional services available, such as clean up or old appliance removal.	
Option ID	The option's ID
Description	The option's description.
Quantity	The quantity of the option.
Price	The option's price.

Refer to the "Return From" table for more information about viewing the return shipping address details.

Table 148. Pickup Request Details Screen, Associated Order Lines

Action	
Remove Association	This action removes the association with the return line.
Fields	Description
Line Number	The pickup item's line number. Click this link to view the Return Line Detail screen.
Item ID	The return line item ID.
PC	The item classification such as first quality, second quality, or finished good. Orders are placed for a particular classification.

Table 148. Pickup Request Details Screen, Associated Order Lines (continued)

UOM	The return line item's unit of measure.
Description	The return line item's description.
Line Quantity	The quantity of the line item returned.
Total Amount	The return line item's total amount.
Status	The current status for that part of the return line.

Additional Product Lines

You can add additional product lines to an existing pickup service request.

Table 149. Pickup Request

Fields	Description
Return Number	The unique identifier of the return. Click this link to view the Return Detail screen.
Item ID	The pickup service item's ID.
Description	The description of the pickup service.
Appointment	The date and time of the pickup.
Line Number	The line number of the pickup service.
UOM	The units of measure in which the pickup service is calculated.
Return to Node	The node that performs the pickup.
Status	The status of the pickup request.
Line Quantity	The quantity used to measure the pickup service.

Table 150. Additional Product Lines Screen, Return Lines

Action	Description
Add To Pickup Request	This action lets you add the selected order lines to the pickup request. A modification reason window pops up to confirm the reason code.
Fields	Description
Line Number	The product line's line number.
Item ID	The product line's item ID.
UOM	The product line's unit of measure.
Description	The product line's description.

Pickup Request Instructions

You can add instructions to a pickup request in this screen. Pickup request instructions enable you to provide information to the personnel who are completing the specific pickup request at hand. You can add, modify, or delete pickup request instructions at any time before the pickup has been scheduled.

Refer to the Pickup Request table for more information about the pickup request header field descriptions.

Table 151. Instructions Window

Action	Description
Delete Instruction	This action enables you to delete the selected instructions. Upon clicking this action, an alert window appears to confirm the deletion of instructions.
Fields	
Instruction Type	The type of instruction, such as Gift, Pick, Pack, Ship, or Other.
Text	The specific instructions to be performed on the order. Specify the instruction URL next to the Instructions URL icon.

You can also use the Instructions window for:

- Adding an Instruction - Select the **Add** icon to add the instruction lines and enter the relevant information in the fields as discussed in the Instructions table.
- Modify an Instruction - The information in the Instructions screen can be modified by entering the modified information and selecting Save.

Once the instructions are added, the **Instructions** icon appears in the corresponding pickup request line in the Return Detail screen.

You can view more pickup request addresses in this screen. For more information about defining additional addresses, see the *Sterling Selling and Fulfillment Foundation: Reverse Logistics Configuration Guide*.

Refer to the Pickup Request table for more information about the pickup request header field descriptions.

Pickup Request Dates

You can view any custom dates that have been configured for monitoring pickup requests in this screen. For more information about monitoring, see the *Sterling Selling and Fulfillment Foundation: Reverse Logistics Configuration Guide*.

Refer to the Pickup Request table for more information about the pickup request header field descriptions.

Table 152. New Dates

Fields	Description
Date Type	The custom date type.
Requested	The date on which the date type is requested to be met.
Expected	The date on which the date type is expected to be met.
Actual	The date on which the date type actually needs to be met.

Enter the information and click Save to update the changes.

Overall Pickup Request Charges

You can view the header level charges of a pickup request in this screen.

The pickup request header panel descriptions can be referred from the Pickup Request table.

Table 153. Charge Category

Fields	Description
Charge Category	The name of the charge category.
Charge Name	The name of the charge.
Charge Amount	The amount of charge applied at the header level.

You can use the Remaining Pickup Request Charges Detail window for adding or modifying the pickup request charges.

The pickup request header panel descriptions can be referred from the Pickup Request table.

- **Adding Remaining Pickup Request Charges** - From the Charges table, choose **Add** icon. A new row appears in the Charges table. From the Charge Category drop-down list, select the category of the new charge. This drop-down displays all pickup request charges and discount charges. Consult your system administrator to determine which charges should be used as pickup request charges and which should be used as discount charges.

Table 154. Remaining Charges

Fields	Description
Charge Category	The name of the charge category. Select the appropriate charge category from the drop-down list.
Charge Name	The name of the charge. Once you select the charge category, this field is populated with a drop-down list. Select the appropriate charge name.
Charge Amount	The amount of charge applied at the header level.

- **Modifying Remaining Pickup Request Charges** - Locate the charges you want to modify. In the charges panel, enter the amount of the charges and click Save. The Modification Reason screen appears. Enter the appropriate reason code and text, and click OK.

Invoiced Pickup Request Charges

You can view the invoice level charges of a pickup request in this screen.

This window displays all pickup request charges and discount charges against the pickup request header.

The pickup request header panel descriptions can be referred from the Pickup Request table. If you view the invoiced pickup request charges screen from the Return Invoices screen the pickup request header panel is replaced with the fields described in the Invoices table.

Table 155. Charge Category

Fields	Description
Charge Category	The name of the charge category.
Charge Name	The name of the charge.

Table 155. Charge Category (continued)

Fields	Description
Charge Amount	The amount of charge applied at the header level.

Overall Pickup Request Taxes - You can view the header level tax information associated with a pickup request.

The pickup request header panel descriptions can be referred from the Pickup Request table.

Table 156. Pickup Request Taxes Screen, Taxes

Fields	Description
Charge Category	The charge category associated with the tax. Important: You must associate a pickup request header level tax with a charge. Otherwise, it is calculated as 0. Note: You cannot apply a pickup request header level tax to a price value.
Charge Name	The charge name associated with the tax. Important: You must associate a pickup request header level tax with a charge. Otherwise, it is calculated as 0. Note: You cannot apply a pickup request header level tax to a price value.
Charge Amount	The charge amount that is taxed.
Tax Name	The name of the tax. For example, International Tax.
Tax Percentage	The percentage of tax applied to the header price.
Tax Amount	The amount of tax applied to the header level.

You can use the Remaining Pickup Request Taxes screen for adding or modifying the order taxes.

The pickup request header panel descriptions can be referred from the Pickup Request table.

- **Adding Remaining Pickup Request Taxes** - From the Taxes panel, choose the **Add** icon. A new row appears in the Taxes panel. From the Charge Category drop-down list, select the category of the new charge and from Tax category, select a new tax name. Enter the relevant information as defined in the following table.
This drop-down displays all pickup request taxes and discount taxes. Consult your system administrator to determine which charges should be used as pickup request taxes and which should be used as discount taxes.

Table 157. Remaining Taxes

Fields	Description
Charge Category	The name of the charge category. Select the appropriate charge category from the drop-down list.
Charge Name	The name of the charge. Once you select the charge category, this field is automatically populated with a drop-down list. Select the appropriate charge name from the list.
Charge Amount	The amount of charge applied at the header level.

Table 157. Remaining Taxes (continued)

Fields	Description
Tax Name	The name of the tax. For example, International Tax.
Tax Percentage	The percentage of tax applied to the header price.
Tax Amount	The amount of tax applied at the header level.

- **Modifying Remaining Pickup Request Taxes** - Locate the taxes you want to modify. In the taxes panel, enter the amount of the charges and click Save. The Modification Reason screen appears. Enter the appropriate reason code and text, and click OK.

Invoiced Pickup Request Taxes

You can view the invoice level tax information associated with an pickup request in this screen.

The pickup request header panel descriptions can be referred from the Pickup Request table. If you view the invoiced pickup request taxes screen from the Return Invoices screen, the pickup request header panel is replaced with the fields described in the Invoices table.

Table 158. Pickup Request Taxes Screen, Taxes

Fields	Description
Charge Category	The charge category associated with the tax. Important: You must associate a pickup request header level tax with a charge. Otherwise, it is calculated as 0. Note: You cannot apply a pickup request header level tax to a price value.
Charge Name	The charge name associated with the tax. Important: You must associate a pickup request header level tax with a charge. Otherwise, it is calculated as 0. Note: You cannot apply a pickup request header level tax to a price value.
Charge Amount	The charge amount that is taxed.
Tax Name	The name of the tax. For example, International Tax.
Tax Percentage	The percentage of tax applied to the header price.
Tax Amount	The amount of tax applied to the header level.

Return Service Request Search By All Attributes - You can search for service requests by all attributes in this screen.

Table 159. Return Service Request Search By All Attributes

Fields	Description
Document Type	The document type for the service request displays.
Enterprise	Choose this field and lookup option to find the specific enterprise you want to use, or choose Across Enterprises to search across all enterprises.
Return #	Enter the return number associated with the service requests for which you want to search, if applicable.

Table 159. Return Service Request Search By All Attributes (continued)

Fields	Description
Buyer	Enter the Buyer associated with the service requests for which you want to search, if applicable.
Seller	Enter the Seller associated with the service requests for which you want to search, if applicable.
Item ID	Enter the item ID to search for orders containing a specific service item, if applicable.
Appointment	Enter the appointment date range through which you want to search for service requests, if applicable.
Return Line Status	Select the status range of the service requests for which you want to search, if applicable.
Max Records	Enter the maximum number of service requests you want returned from your search.

The Service Request List screen displays as a result of this search.

Return Service Request Search By Draft Returns

Table 160. Return Service Request Search By Draft Returns

Fields	Description
Document Type	The document type for the service request displays.
Enterprise	Choose the field and lookup option to find the specific enterprise you want to use, or choose Across Enterprises to search across all enterprises.
Return #	Enter the return number associated with the service requests you want to search for, if applicable.
Buyer	Enter the Buyer associated with the service requests you want to search for, if applicable.
Seller	Enter the Seller associated with the service requests you want to search for, if applicable.
Buyer Account #	Enter the Buyer account number associated with the service requests for which you want to search, if applicable.
Max Records	Enter the maximum number of service requests you want returned from your search.

The Service Request List screen displays as a result of this search.

Service Request List

The Service Request List screen displays the results of a provided service search. You can perform actions on one or more requests by selecting the check boxes of the appropriate requests on which you want to perform an action by choosing the applicable action from the action bar.

Table 161. Service Request List

Actions	Description
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Table 161. Service Request List (continued)

View Details	This action takes you to the Service Request Details screen where you can view the details of the service requests and the associated order lines for the selected service requests.
View Instructions	This action takes you to the Service Request Instructions screen where you can enter instructions for the selected service requests.
More Addresses	This action takes you to the More Service Request Addresses screen where you can add, modify, or view additional addresses for the selected service requests.
Remove	This action removes only the selected draft service requests.
Fields	Description
Return #	The return number associated with the service request.
Line #	The line number of the service request in the return order. Click this link to view the Service Request Details screen.
Status	The status of the service request.
Enterprise	The enterprise associated with the return order.
Return Date	The date on which the return order was placed.
Total Amount	The total cost applicable to the service request.

Service Request Details

You can view the details of the selected service requests in this screen.

Table 162. Service Request Details Screen, Service Request

View Icons	Description
Work Orders	View Work Order - This icon takes you to the Work Order Details screen where you can view the related work order associated with the service request.
Instructions	Instructions - This icon takes you to the Service Request Instructions screen where you can add or modify the instructions of the service request.
Address	More Addresses - This icon takes you to the More Service Request Addresses screen where you can add or modify addresses.
Shipment Data Types	Service Request Dates - This icon takes you to the Service Request Dates screen where you can view the requested, expected, and actual date type for the service request.
Chained Orders	Related Order Lines - This icon takes you to the Related Order Lines screen where, for example, you can view the sales order lines created from the Order Console.
Action	Description
Cancel	Select this action to cancel the service request. In the Modification Reason screen, enter the reason code and reason text for cancelling the service request.
Fields	Description

Table 162. Service Request Details Screen, Service Request (continued)

Return #	The unique identifier of the return order. Click this link to view the order details. For more information about viewing the order details, see the <i>Sterling Selling and Fulfillment Foundation: Distributed Order Management User Guide</i> .
Line #	The line number of the service.
Status	The status of the service request.
Item ID	The unique identifier of the service item.
UOM	The unit of measure in which the service is calculated.
Line Quantity	The quantity used to measure the service.
Description	The description of the service.
Document Type	The document type associated with the service request.
Appointment	The date and time of the service.
Return to Node	The node handling the return.

Table 163. Service Request Details Screen, Charges And Taxes

Fields	Description
All fields are tabulated for the overall, open, and invoiced prices.	
Extended Price	This is calculated as the total quantity times the unit price.
Option Price	The price of any additional option associated with the item ordered.
Fees	The fees applied to the associated line. Click the corresponding hyperlink to view the Overall Service Request Charges, "Overall Service Request Charges" on page 111, or Invoiced Service Request Charges.
Charges	The total charges applied to the associated line. Click the corresponding hyperlink to view the Overall Service Request Charges, "Overall Service Request Charges" on page 111, or Invoiced Service Request Charges.
Tax	The total taxes applied to the order line. Click the corresponding hyperlink to view the "Invoiced Service Request Charges" on page 113, or Invoiced Service Request Taxes.
Totals	The total amount of the line after applying the charges and taxes.

Table 164. Service Request Details Screen, Options

Fields	Description
This Options table displays only when a provided service has optional services, such as clean up or old appliance removal.	
Option ID	The unique identifier of the option.
Description	The description of the option.
Price	The price of the option.

Table 165. Service Request Details Screen, Return From

You can view the details of the person or organization from where the product is being returned. For more information about viewing the return shipping address details, see Table 7 on page 26.
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Table 166. Service Request Details Screen, Associated Order Lines

Action	Description
View Details	This action takes you to the Order Line Detail screen where you can view the details of the selected associated order line. For more information about viewing the details of the associated order line, see the <i>Sterling Selling and Fulfillment Foundation: Distributed Order Management User Guide</i> .
Fields	Description
Line #	The line number of the return item. Click this link to view the Return Line Detail screen.
Item ID	The item identifier of the return line.
PC	The item classification such as first quality, second quality, or finished good. Orders are placed for a particular classification.
UOM	The unit of measure of the return line item.
Description	The description of the return line item.
Line Quantity	The line quantity of the item returned.
Total Amount	The total amount of the return line item.
Status	The current status of the return line.

Service Request Instructions

You can add instructions to a service request in this screen.

Table 167. Service Request Instructions Screen, Service Request

Fields	Description
Return #	The unique identifier of the return order. Click this link to view the order details. For more information about viewing the order details, see the <i>Sterling Selling and Fulfillment Foundation: Distributed Order Management User Guide</i> .
Line #	The line number of the service.
Status	The status of the service request.
Item ID	The item identifier of the service.
UOM	The unit of measure in which the service is calculated.
Line Quantity	The line quantity used to measure the service.
Description	The description of the service.
Appointment	The date and time of the appointment.
Return To Node	The node handling the return.

Table 168. Instructions Window

Action	Description
Delete Instruction	This action enables you to delete the selected instructions. Upon clicking this action, an alert window appears to confirm the deletion of instructions.
Fields	

Table 168. Instructions Window (continued)

Action	Description
Instruction Type	The type of instruction, such as Gift, Pick, Pack, Ship, or Other.
Text	The specific instructions to be performed on the order. Specify the instruction URL next to the Instructions URL icon.

You can also use the Instructions window for:

- Adding an Instruction - Select the **Add** icon to add instruction lines and enter the relevant information in the fields as discussed in the Instructions table.
- Modifying an Instruction - The information in the Instructions screen can be modified by entering the modified information and clicking Save.

Once the instructions are added, **Instructions** icon displays in the corresponding Service Request line in the Return Detail screen.

You can view more service request addresses in this screen. For more information about defining additional address types, see the *Sterling Selling and Fulfillment Foundation: Reverse Logistics Configuration Guide*.

For more information about the service request header level field descriptions, see Table 167 on page 110.

Service Request Dates

You can view any custom dates that are configured for monitoring service requests in this screen. For more information about monitoring service requests, see the *Sterling Selling and Fulfillment Foundation: Reverse Logistics Configuration Guide*.

For more information about the service request header level field descriptions, see Table 167 on page 110.

Table 169. New Dates

Fields	Description
Date Type	The custom date type.
Requested	The date on which the date type is requested to be met.
Expected	The date on which the date type is expected to be met.
Actual	The date on which the date type actually needs to be met.

Overall Service Request Charges

You can view the header level charges of a service request in this screen.

For more information about the service request header level field descriptions, see Table 167 on page 110.

Table 170. Charge Category

Fields	Description
Charge Category	The name of the charge category.
Charge Name	The name of the charge.
Charge Amount	The amount of charge applied at the header level.

Remaining Service Request Charges - You can use the Remaining Service Request Charges screen to add or modify the service request charges.

For more information about the service request header level field descriptions, see Table 167 on page 110.

Adding Remaining Service Request Charges

About this task

To add the remaining service request charges:

Procedure

1. From the Charges table, choose the **Add** icon. A new row displays in the Charges table.
2. From the Charge Category drop-down list, select the category of the new charge.

The drop-down list displays all service request charges and discount charges. Consult your system administrator to determine which charges to use as service request taxes and fee taxes.

Results

Table 171. Remaining Charges

Fields	Description
Charge Category	The name of the charge category. Select the appropriate charge category from the drop-down list.
Charge Name	The name of the charge. Once you select the charge category, this field is populated with a drop-down list. Select the appropriate charge name.
Charge Amount	The amount of charge applied at the header level.

After making changes to the Charges panel, click Save to update the remaining service request charges. The Modification Reason screen displays. Enter the appropriate reason code and text, and click OK.

Modifying Remaining Service Request Charges

About this task

To modify the remaining service request charges:

Procedure

1. Search for the charges you want to modify.
2. In the Charges panel, enter the amount of the charges and click Save.
3. In the Modification Reason screen, enter the appropriate reason code and text, and click OK.

Invoiced Service Request Charges

You can view the invoice level charges of a service request in this screen.

This window displays all service request charges and discount charges against the service request header.

For more information about the service request header level field descriptions, see Table 167 on page 110.

If you view the invoiced service request charges screen from the Return Invoices screen, the service request header panel is replaced with the fields described in Table 20 on page 34.

Table 172. Charge Category

Fields	Description
Charge Category	The name of the charge category.
Charge Name	The name of the charge.
Charge Amount	The amount of charge applied at the header level.

Overall Service Request Taxes - You can view the header level tax information associated with a service request.

For more information about the service request header level field descriptions, see Table 167 on page 110.

Table 173. Service Request Taxes Screen, Taxes

Fields	Description
Charge Category	The charge category associated with the tax. Important: You must associate a service request header level tax with a charge. Otherwise, it is calculated as 0. Note: You cannot apply a service request header level tax to a price value.
Charge Name	The charge name associated with the tax. Important: You must associate a service request header level tax with a charge. Otherwise, it is calculated as 0. Note: You cannot apply a service request header level tax to a price value.
Charge Amount	The charge amount that is taxed.
Tax Name	The name of the tax. For example, International Tax.
Tax Percentage	The percentage of tax applied to the header price.
Tax Amount	The amount of tax applied at the header level.

Remaining Service Request Taxes - You can use the Remaining Service Request Taxes screen to add or modify the order taxes.

For more information about the service request header level field descriptions, see Table 167 on page 110.

Adding Remaining Service Request Taxes

About this task

To add the remaining service request taxes:

Procedure

1. From the Taxes panel, choose the **Add** icon.. A new row displays in the Taxes panel.
2. From the Charge Category drop-down list, select the category of the new charge.
3. From Tax Category, select a new tax name.
4. Enter information in the applicable fields. For the field value descriptions, see The drop-down list displays all service request taxes and discount taxes. Consult your system administrator to determine which charges to use as service request taxes and fee taxes.

Results

Table 174. Remaining Taxes

Fields	Description
Charge Category	The name of the charge category. Select the appropriate charge category from the drop-down list.
Charge Name	The name of the charge. Once you select the charge category, this field is automatically populated with a drop-down list. Select the appropriate charge name from the list.
Charge Amount	The amount of charge applied at the header level.
Tax Name	The name of the tax. For example, International Tax.
Tax Percentage	The percentage of tax applied to the header price.
Tax Amount	The amount of tax applied at the header level.

After making changes in the Taxes panel, click Save to update the remaining service request taxes. In the Modification Reason screen, enter the appropriate reason code and text, and click OK.

Modifying Remaining Service Request Taxes

About this task

To modify the remaining service request taxes:

Procedure

1. Search for the taxes you want to modify.
2. In the taxes panel, enter the amount of the charges and click Save.
3. In the Modification Reason screen that pops up enter the appropriate reason code and text and click OK.

Invoiced Service Request Taxes

About this task

You can view the invoice level tax information associated with a service request in this screen.

For more information about the service request header level field descriptions, see Table 167 on page 110.

If you view the invoiced service request taxes screen from the Return Invoices screen, the service request header panel is replaced with the fields described in Table 20 on page 34.

Table 175. Service Request Taxes Screen, Taxes

Fields	Description
Charge Category	The charge category associated with the tax. Important: You must associate a service request header level tax with a charge. Otherwise, it is calculated as 0. Note: You cannot apply a service request header level tax to a price value.
Charge Name	The charge name associated with the tax. Important: You must associate a service request header level tax with a charge. Otherwise, it is calculated as 0. Note: You cannot apply a service request header level tax to a price value.
Charge Amount	The charge amount that is taxed.
Tax Name	The name of the tax. For example, International Tax.
Tax Percentage	The percentage of tax applied to the header price.
Tax Amount	The amount of tax applied at the header level.

To view history return details:

Procedure

1. From the navigation bar, select Reverse Logistics.
2. Choose the Return Console. The Return Search window appears.
3. Search for the applicable history return orders.
4. From the list, select the check boxes of the applicable history return orders.
5. From the action bar, choose View Details. The History Return Detail window appears.

All actions that result in the return modification or status change are not allowed for history returns. Modifications to a return are only allowed after restoring a history return.

Organization Details

You can view an organization's details in this screen.

Table 176. Organization Details

Field	Description
Organization Information	
Organization Code	The code that identifies the organization.
Organization Name	The name of the organization.
DUNS Number	The unique nine-digit identification sequence which provides unique identifiers of single business entities. Sterling Selling and Fulfillment Foundation does not associate any logic with the DUNS number.
Account Number With Hub	If the organization is not the Hub, the account number that the organization has with the Hub.
Primary Enterprise	The primary enterprise of the organization.
Primary URL	Enter the URL of the organization's Internet address, if applicable.
Primary Contact Address	
This inner panel displays the current primary contact address for this organization. Click the Address Details icon to view the Primary Contact Address Details. For more information about the Primary Contact Address Details window, refer to Organization Address Details Screen.	
Corporate Address	
This inner panel displays the current corporate address for this organization. Click the Address Details icon to view the Corporate Address Details. For more information about the Corporate Address Details window, see Organization Address Details Screen.	

Organization Address Details Screen

Table 177. Address Details

Fields	Description
First Name	The first name.
Middle Name	The middle name.
Last Name	The surname.
Company	The company.
Day Time Phone	The day time phone number.
Evening Phone	The evening phone number.
Mobile Phone	The mobile phone number.
Fax	The fax number.
E-Mail	The e-mail address.
Address Line 1	The first address line.
Address Line 2	The second address line, if applicable.
Address Line 3	The third address line, if applicable.
Address Line 4	The fourth address line, if applicable.
Address Line 5	The fifth address line, if applicable.

Table 177. Address Details (continued)

Fields	Description
Address Line 6	The sixth address line, if applicable.
City	The city.
State	The state.
Postal Code	The postal code.
Country/Region	The country or region.

Enter the relevant information and click Save to update the changes. The return modification reason window pops up. Enter the reason code and text and click OK.

Return Modification Reason

When you modify any information in the return console screen and click Save, the return modification reason window pops open for you to select the reason code and enter a reason text. The reason code is specified in the modification reasons tree in Reverse Logistics node of the Applications Manager. For more information about specifying the reason codes, see the *Sterling Selling and Fulfillment Foundation: Reverse Logistics Configuration Guide*.

Table 178. Return Modification Reason

Fields	Description
Reason Code	Select the reason code for the modification. The reason code can be specified in the Applications Manager. For more information, refer to the <i>Sterling Selling and Fulfillment Foundation: Reverse Logistics Configuration Guide</i> .
Reason Text	Enter the reason text for the modification.

Modification Reason

When you modify any information in the return console screen and click Save, the return modification reason window pops open for you to select the reason code and enter a reason text. The reason code is specified in the modification reasons tree in Reverse Logistics node of the Applications Manager. For more information about specifying the reason codes, see the *Sterling Selling and Fulfillment Foundation: Reverse Logistics Configuration Guide*.

Table 179. Return Modification Reason

Fields	Description
Reason Code	Select the reason code for the modification. The reason code can be specified in the Applications Manager. For more information, see the <i>Sterling Selling and Fulfillment Foundation: Reverse Logistics Configuration Guide</i> .
Reason Text	Enter the reason text for the modification.

Configured Questions

The address or permit questions and answer options displayed on this screen are configured. For more information about configuring questions and answer options, refer to the *Sterling Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.

Once you have selected or entered your necessary answers, click Save.

Modify Return From Address

You can modify the ship to address in this screen.

Table 180. Modify Return From Address

Fields	Description
Address Line 1	The return from address line 1.
Address Line 2	The return from address line 2.
Address Line 3	The return from address line 3.
Address Line 4	The return from address line 4.
Address Line 5	The return from address line 5.
Address Line 6	The return from address line 6.
City	The city.
State	The state to which the city belongs to.
Postal Code	The postal code of the city.
Country/Region	The country or region.
First Name	The vendor's first name.
Middle Name	The vendor's middle name.
Last Name	The vendor's last name.
Company	The company name of the vendor.
Day Time Phone	The vendor's day time phone number.
Evening Phone	The vendor's evening time phone number.
Mobile Phone	The vendor's mobile number.
Fax	The fax number.
E-mail	The vendor's e-mail address.
Additional Address and / or Permit Questions have been answered for this address.	This field is shown when additional address and/or permit questions have been answered for this address. Selecting the Retain Existing Answers radio button saves the answers for this address. Selecting Clear Answers clears all answers for this address.

Click Save to update any modifications in the screen.

Chapter 9. Create Return Console

The Create Return Console enables a user to manually enter a blind return. A blind return occurs when items are returned without any advanced notification, such as a Return Merchandise Authorization (RMA).

Return Entry

Table 181. Return Entry Screen

Fields	Description
Document Type	The document type associated with the return.
Enterprise	Select the Enterprise that is to handle the order.
Buyer	Enter the Buyer returning the order.
Seller	Enter the Seller that the order is being returned to.
Return #	Enter the return number.
Return Date	Enter the date the return is placed.
Return Type	This field can be customized as needed.
Currency	Select the currency with which any refunds are to be handled in.
Return Against Order	No" indicates that the return is not derived from an order; it is a blind return.
Return To Node	Enter the node the return is sent to.
Return By Gift Recipient	Check this if items are being returned by the gift recipient of the original order.

The Create Return action creates a return order in the Draft status. Changes can be made to a return at any time while it is in Draft status. A Draft return does not enter Created status until it is confirmed.

Note: If you try to add an item that is configured as non-returnable, a warning is displayed. However, the system does let you create a return for a non-returnable item.

Returnable Order Lines

About this task

If a return must be created for an order that was shipped through Sterling Selling and Fulfillment Foundation, you can create a return against the order through the Order Console. For returns on inbound orders shipped through Sterling Selling and Fulfillment Foundation, use the Inbound Order Console.

To create a return against an order:

Procedure

1. From the navigation bar, select Order for orders or Supply for inbound orders.

2. Choose Order Console for orders or Inbound Order Console for inbound orders. The search window appears.
3. Search for the applicable orders.
4. From the list, select the check boxes of the applicable orders. purchase orders. returns.
5. From the action bar, choose Create Return. The Returnable Order Lines window appears.

Table 182. Returnable Order Lines Screen, Return

Fields	Description
Document Type	The document type associated with the return.
Enterprise	The Enterprise that is to handle the order.
Buyer	The Buyer returning the order.
Seller	The Seller that the order is being returned to.
Return #	Enter the return number.
Return Date	Enter the date the return is placed.
Return Type	This field can be customized as needed.
Currency	The currency with which any refunds are to be handled in.
Return Against Order	Yes indicates that the return is derived from an order.
Return To Node	Enter the node the return is sent to.
Return By Gift Recipient	Check this if items are being returned by the gift recipient of the original order.

Table 183. Returnable Order Lines Screen, Returnable Order Lines

Fields	Description
Line	The return line number being authorized.
Item ID	The the item ID of the return item being authorized.
PC	The return item's product class.
UOM	The return item's unit of measure.
Description	The return item's description.
Tag #	This column displays only if the item is tag-controlled. The column label that displays is the name of the unique identifier you have defined (for example, Lot #). If you have defined more than one unique identifier, the label that displays is Tag #. To view the details associated with the inventory batch number the return line belongs to, click the hypertext link.
Ship By Date	The date the return item should be shipped by.
Available To Return	The quantity of the return item available to be returned.
Return Qty	Enter the quantity of the item being returned in the return line.
Line Type	From the drop-down, select the line type.
Reason Code	From the drop-down, select the reason for the item being returned.
Return To Node	Enter the node handling the return line.

Chapter 10. Create Return Shipment Entry Console

The Create Return Shipment entry console is used to manually create shipments from fax, email or telephone conversations or when a trailer arrives with no prior notice.

Return Shipment Entry

You can create return shipments with supervisory overrides in this screen.

Table 184. Return Shipment Entry

Action	Description
Supervisory Overrides	This action takes you to the "Shipment Supervisory Overrides" on page 122 screen where you can specify the shipment overrides.
Fields	Description
Document Type	Select the document type associated with the shipment you are creating for. Valid value is 'Return Order'.
Receiving Node	Select node where the receipt is being performed. This is automatically defaulted by the system based on the user profile.
Enterprise	Select the enterprise associated with the shipment you are creating for, if applicable.
Shipment #	Enter the shipment number for the shipment you are creating, if applicable. A unique number is automatically generated by the system, if number is not specified.
Return From Node	Enter the return node associated with the shipment.
Buyer	Enter the buyer associated with the shipment you want to create, if applicable.
Seller	Enter the seller associated with the shipment you want to create.
Return #	Enter the return number.
Release#	Enter the release number of the order against which the shipment is being created, if applicable.
Pro#	Enter the PRO number assigned by the carrier to track the shipment you are creating, if applicable.
Service	Select the carrier service availed for transporting the shipment, if applicable.
BOL#	Enter the bill of lading number of the shipment you are creating, if applicable.
Trailer#	Enter the trailer number of the shipment you are creating, if applicable.

After entering the necessary details select Create Shipment to create the shipment and you are taken to the Return Shipment Details screen.

Shipment Supervisory Overrides

In this screen you can check the shipment overrides.

Table 185. Shipment Supervisory Overrides

Fields	Description
Override Shipment Entry	Select this to allow shipment entry.
Do not verify Pallet Content	Select this to skip pallet content verification for this shipment.
Do not verify Case Content	Select this to skip case content verification for this shipment.
Allow Overage	Select this to allow overage for this shipment.
Order not Available on System	Select this to verify the order is not available on the system for this shipment.

Chapter 11. Return Shipment Console

The Return Shipment Console provides access to information about returned shipments and returned containers.

Return Shipment Search By Status

You can search for return shipments by their status with the help of this screen.

Do not use spaces before or after any text you enter in the search fields, as this may result in inconsistent or inaccurate results.

Table 186. Return Shipment Search by Status

Fields	Description
Document Type	Select the appropriate document type to search for, if applicable.
Enterprise	Select the enterprise you are searching for.
Across Enterprises	Select this option if you are searching across all enterprises.
Shipment #	Enter the shipment number to search for, if applicable.
Return #	Enter the return number you are searching for, if applicable.
Plan #	Enter the plan number the return shipment you are searching for belongs to, if applicable.
Origin Node	Enter the origin node you want to search for return shipments under, if applicable.
Destination Node	Enter the destination node you want to search for return shipments under, if applicable.
Status	Select the status range of the return shipments you want to search for, if applicable.
Closed Shipments Only	Select this if you only want to search for return shipments that have been closed, if applicable.
Held Shipments With Hold Type	Check this box if you want to search for return shipments that are held.
Max Records	Enter the maximum number of returns you want returned from your search.

Enter the relevant information and click Search. The Return Shipment List screen is displayed.

Return Shipment Search By Date

You can search for return shipments by their shipment dates with the help of this screen.

Do not use spaces before or after any text you enter in the search fields, as this may result in inconsistent or inaccurate results.

Table 187. Return Shipment Search by Date

Fields	Description
Document Type	Select the appropriate document type to search for, if applicable.
Enterprise	Select the enterprise you are searching for.
Across Enterprises	Select this option if you are searching across all enterprises.
Shipment #	Enter the return shipment's number you want to search for, if applicable.
Return #	Enter the draft return number you are searching for, if applicable.
Expected Ship Date	Enter the expected ship date range you want to search for returns through, if applicable.
Expected Delivery Date	Enter the expected delivery date range you want to search for returns through, if applicable.
Actual Ship Date	Enter the actual ship date range you want to search for returns through, if applicable.
Actual Delivery Date	Enter the actual delivery date you want to search for returns through, if applicable.
Max Records	Enter the maximum number of draft returns you want returned from your search.

Enter the relevant information and click Search. The Return Shipment List screen is displayed.

Return Shipment Search By Item

You can search for return shipments by the shipment items with the help of this screen.

Do not use spaces before or after any text you enter in the search fields, as this may result in inconsistent or inaccurate results.

Table 188. Return Shipment Search by Item

Fields	Description
Document Type	Select the appropriate document type to search for, if applicable.
Enterprise	Select the enterprise you are searching for.
Across Enterprises	Select this option if you are searching across all enterprises.
Shipment #	Enter the return shipment's number you want to search for, if applicable.
Item ID	Enter the item's ID you want to search for, if applicable.
Buyer	Enter the Buyer's ID you want to search for, if applicable.
Seller	Enter the Seller's ID you want to search for, if applicable.
Max Records	Enter the maximum number of returns you want returned from your search.

Enter the relevant information and click Search. The Return Shipment List screen is displayed.

Return Shipment List

The return shipment list displays the results of a return search. You can perform actions on a single return or multiple returns by selecting the check boxes of the returns you want to perform an action on and choosing the applicable action from the action bar.

Table 189. Return Shipment List

Actions	Description
View Details	This action takes you to the Return Shipment Details screen for selected shipments. In this screen, you can view the container details, start and record receipts.
Delete Shipment	Click this action if you want to delete the selected shipments. Upon clicking, an alert screen is displayed to confirm the deletion.
Start Receipt	This action takes you to the "Start Receipt" on page 83 screen where you can enter the necessary information required for creating a receipt.
Receive	This action takes you the Receive Details screen. For more information about this screen, see the <i>Sterling Selling and Fulfillment Foundation: Warehouse Management System User Guide</i> .
Report/Record Receipt	This action takes you to the Receive screen where you can report or record the receipt.
View Holds	This action takes you to the View Holds screen where you can view the holds applied to the return shipment.
Fields	Description
Shipment #	The return shipment's number.
Status	The current status of the return shipment.
Expected Ship Date	The return shipment's expected ship date.
Actual Ship Date	The return shipment's actual ship date.
Expected Delivery Date	The return shipment's expected delivery date.
Actual Delivery Date	The return shipment's actual delivery date.
Origin	The return shipment's origin.
Destination	The return shipment's destination.
Mode	The return shipment's mode.

Return Shipment Details

Table 190. Return Shipment Details, Shipment

View Icons	Description
Load	Loads - This action takes you to the "Shipment Loads" on page 129 screen where you can view the loads associated with this shipment.
Containers	Containers - This action takes you to the "Shipment Containers" on page 130 list screen where you can perform certain actions for viewing the details of the containers or delete the container.

Table 190. Return Shipment Details, Shipment (continued)

Instructions	Instructions - This icon lets you view the “Shipment Instructions” on page 130 screen where you can add, modify or delete the instructions for the return shipments.
Audit	Shipment Audits - This icon takes you to the Shipment Audits screen where you can view the list of audits performed on the shipments.
Shipment Data Types	Shipment Dates - This icon takes you to the Shipment Dates screen to view the requested, expected and actual date type for the given shipments.
Alert	Alerts - This icon takes you to the “Shipment Alerts” on page 134 screen where you can view the alerts for the order.
Return Receipt	Receipts - This icon takes you to the Return Shipment Console: Return Receipt List screen where you can view the related receipts for this shipment and perform associated actions.
Additional Attributes	Additional Attributes - This icon takes you to the Return Shipment Console: Return Receipt List screen where you can specify additional attributes for Identification, Shipping and Financials.
Activity Demand	This icon takes you to the “Shipment Activity Demand” on page 135 screen which displays the activity demand details for the selected shipment.
Actions	Description
Confirm Shipment	This action lets you confirm the shipments.
Record Container Details	This action takes you to the Pack Container screen where you can enter details about the unpacked container items. For more information, refer to the <i>Sterling Selling and Fulfillment Foundation: Warehouse Management System User Guide</i> .
Start Receipt	This action takes you to the “Start Receipt” on page 83 screen where you can enter details on starting a receipt for receiving the returns.
Receive	This action takes you to the Receive details screen. For more information, refer to the <i>Sterling Selling and Fulfillment Foundation: Warehouse Management System User Guide</i> .
Report/Record Receipt	This action takes you to the Receive screen where you can report or record a receipt for the return shipments.
View Holds	This action takes you to the View Holds screen where you can view the holds applied to the return shipment.
Fields	Description
Shipment #	The return shipment number.
Shipper's Ref. #	The return shipment reference number.
Plan #	The delivery plan number the return shipment is associated with, if applicable.
Enterprise	The enterprise associated with the return shipment.
Buyer	The buyer's ID.
Seller	The seller's ID.
Return From Node	The return from node.
Return To Node	The return to node.

Table 190. Return Shipment Details, Shipment (continued)

Status	The return shipment status. Click the Work Order Hold icon to go to the View Holds screen where you can view holds that are applied to the load.
Has Hazardous Items	Indicates if the shipment contains any hazardous item.

Table 191. Return To

View Icon	Description
Address Details	Address Details - Choose this icon to view or modify the Return To addresses. For more information about the screen that is displayed, refer to Organization Address Details Screen.
The name and address of the person or organization where the order is to be returned.	

Table 192. Return From

View Icon	Description
Address Details	Address Details - Choose this icon to view or modify the Return From addresses. For more information about the screen that is displayed, refer to Organization Address Details Screen.
The name and address of the person or organization from where the product is being returned.	

Table 193. Return Shipment Details Screen, Total

Fields	Description
Weight	The total weight of the return shipment. This field can be modified.
Volume	The total volume of the return shipment. This field can be modified.
No. of Containers	The number of packed containers in a return shipment.

The following table is displayed if the return is associated with a shipment carrier.

Table 194. Return Shipment Details Screen, Carrier Info

Fields	Description
Delivery Method	The delivery method "Shipping" indicates this return is shipped by the carrier.
Ship Mode	The mode of return shipment. For example, truckload, less-than truckload, and parcel.
Service	The carrier service used to ship the return shipment. This field can be modified.
Trailer #	The trailer number.
BOL #	The bill of lading number.
Seal #	The seal number.
PRO #	The PRO number.
Routing Source	Indicates if routing was pre-assigned by the system or specified through an external system.
Load #	The return shipment's load number.

Table 194. Return Shipment Details Screen, Carrier Info (continued)

Fields	Description
Routing Error Code	The routing error code is automatically displayed by the system, if applicable.
Requested Carrier Service	The requested carrier service for the return shipment.
Airway Bill #	Indicates the airway bill number for tracking the shipment. The airway bill is a document of carriage which is issued by airlines to shippers of cargo. The airway bill number: <ul style="list-style-type: none"> • Is an evidence of a contract of carriage. • Proves receipt of goods for shipment. • Is a freight bill.

The following table is displayed if the return is associated with a delivery carrier. From this table you can also confirm a return delivery request appointment.

Table 195. Return Shipment Details Screen, Carrier Info (Delivery)

Fields	Description
Delivery Method	The delivery method "DEL" indicates this return is delivered by the carrier.
Associated Delivery Request	The line on return associated with the return delivery request.
Item ID	The item ID of the return delivery service item.
Description	The description of the return delivery service item.
Appointment	The appointment scheduled for the delivery.

Table 196. Return Shipment Details Screen, Charges

Fields	Description
Carrier Account #	The account number of the carrier which is to be charged.
Freight Terms	The freight terms associated with this carrier.
COD Payment Method	Select the COD payment type for the carrier.
Estimated Shipment Charges	The estimated charge for shipping the return shipment.
Actual Shipment Charges	The actual charge for shipping the return shipment.
Freight Charge	The charge applied by the Carrier for shipping the return shipment.

Table 197. Return Shipment Details Screen, Shipment Lines

Actions	Description
View Details	This action takes you to the line screen where you can view the details of the shipment line.
Add Release	Click this option to add releases for the selected shipments. The Return Release Search By Status screen appears. Enter the relevant search details and click Search. The Return Release List screen is displayed. Select the releases and click Add to Shipment.
Remove Line	This action removes the selected shipment lines.
Fields	Description

Table 197. Return Shipment Details Screen, Shipment Lines (continued)

Shipment Line #	The return shipment line number. Click this link to go to the Shipment Line Details screen where you can view the shipment line attributes for the selected shipment line number.
Return #	Enter the return number.
Line #	Enter the return shipment line number.
Release #	Enter the order release number to which the return shipment line belongs.
Item ID	Enter the return item ID.
Description	A brief description of the item.
PC	Select the item's product class.
UOM	Select the item's unit of measure.
Requested Serial #	The requested serial number for the order. Editable if the order is not available on the system.
Mark For	The mark for address associated with the item.
Quantity	Enter the shipment line's expected quantity. If the Receipt is made against an order, Quantity is displayed as 0.
Shortage Quantity	Indicates the shortage quantity received for the item in this shipment.
Received Quantity	Indicates the quantity received for the item in this shipment. If the receipt is against an order, it indicates the quantity received for the order.

Shipment Loads

You can view the return shipment loads in this screen.

Table 198. Shipment

Fields	Description
Shipment #	The return shipment number.
Shipper's Ref. #	The return shipment reference number.
Plan #	The delivery plan number the return shipment is associated with, if applicable.
Enterprise	The Enterprise associated with the shipment.
Buyer	The Buyer's ID.
Seller	The Seller's ID.
Ship Node	The node from where the receipt ships. Click this link to go to the "Ship Node Detail" screen to view the node details for the shipment. For more information about this screen, refer to the <i>Sterling Selling and Fulfillment Foundation: Distributed Order Management User Guide</i> .
Destination	The return order's shipment destination.
Status	The return shipment status.

Table 198. Shipment (continued)

Fields	Description
Order #	The order number associated with the return order shipment.

Table 199. Return Shipment Loads Screen, Loads

Field	Description
Load #	The load number the return shipment belongs to.
Load Type	The load type as per your business practices.
Carrier/Service	The Carrier and Carrier service transporting the load.
Origin	The load's origin location.
Destination	The load's destination location.
Status	The load status.

Shipment Containers

Refer to “Shipment Loads” on page 129 table for field descriptions of the shipment header panel seen in this screen.

Table 200. Return Shipment Containers Screen, Containers.

Fields	Description
Container #	The container number.
Tracking #	The container's tracking number used to track the status and location of the container.
Container SCM	The shipment container marking.
Net Weight	The container's content's weight.
Net Weight UOM	The net weight unit of measure associated with the shipment.
Gross Weight	The weight of the container plus its contents.
Gross Weight UOM	The gross weight unit of measure.
Freight Charge	The charge applied by the Carrier for shipping the container.
Received	Indicates whether the shipment was received or not.

Shipment Instructions

You can specify instructions on the shipments in this screen.

Refer to “Shipment Loads” on page 129 table for field descriptions of the shipment header panel seen in this screen.

Table 201. Instructions Window

Action	Description
Delete Instruction	This action enables you to delete the selected instructions. Upon clicking this action, an alert window appears to confirm the deletion of instructions.
Fields	

Table 201. Instructions Window (continued)

Action	Description
Instruction Type	The type of instruction, such as Gift, Pick, Pack, Ship, or Other.
Text	The specific instructions to be performed on the order. Specify the instruction URL next to the Instruction URL icon.

You can also use the Instructions window for:

- Adding an Instruction - Select the **Add** icon to add the instruction lines and enter the relevant information in the fields as discussed in the Shipment Instructions table.
- Modify an Instruction - The information in the Shipment Instructions screen can be modified by entering the modified information and selecting Save.

Shipment Audits

You can view the shipment audits associated with a return in this screen.

Table 202. Shipment Audits, Shipment

Fields	Description
Shipment #	The receipt's shipment number.
Shipper's Ref. #	The receipt's shipment reference number.
Plan #	The delivery plan number with which the return shipment is associated, if applicable.
Enterprise	The Enterprise associated with the receipt.
Buyer	The Buyer's ID. Click this link to go to the Organization Details screen where you can view the buyer organization details.
Seller	The Seller's ID. Click this link to go to the Organization Details screen where you can view the seller organization details.
Ship Node	The node from where the receipt ships. Click this link to go to the "Ship Node Detail" screen to view the node details for the shipment. For more information about this screen, refer to the <i>Sterling Selling and Fulfillment Foundation: Distributed Order Management User Guide</i> .
Receiving Node	The node that is receiving the receipt.
Status	The return shipment status. Click this link to go to the Shipment Status Audits screen where you can view the shipment status audits.
Has Hazardous Item	Indicates if the receipt has any hazardous item.

Table 203. Shipment Audits, Shipment Audits

Fields	Description
Date	The date and time on which the shipment was modified associated with the receipt.
Modified By	The user who performed the modification.
Context	The modifications carried out against the return shipment.

Table 203. Shipment Audits, Shipment Audits (continued)

Fields	Description
Modification	The attribute that was modified for the return shipment.
Old Value	The attribute value before making the modifications.
New Value	The attribute value after it was modified.
Reason Code	The reason for the modification.
Reason Text	Additional information as to why the modification was made.

Table 204. Shipment, Shipment Line Audits

Fields	Description
Date	The date and time on which the return shipment line was modified.
Modified By	The user who performed the modification.
Context	The modifications carried out against the return shipment line.
Line #	The return shipment line number that was modified.
Modification	The attribute that was modified for the return shipment line.
Old Value	The attribute value before making the modifications.
New Value	The attribute value after it was modified.
Reason Code	The reason for the modification.
Reason Text	Additional information as to why the modification was made.

Shipment Status Audits

You can view the audits for the changes in the shipment status with the help of this screen.

Table 205. Shipment Status Audits, Shipment

Fields	Description
Shipment #	The receipt's shipment number.
Shipper's Ref. #	The receipt's shipment reference number.
Plan #	The delivery plan number with which the return shipment is associated, if applicable.
Enterprise	The Enterprise associated with the receipt.
Buyer	The Buyer's ID. Click this link to go to the Organization Details screen where you can view the buyer organization details.
Seller	The Seller's ID. Click this link to go to the Organization Details screen where you can view the seller organization details.
Ship Node	The node from where the receipt ships. The node from where the receipt ships. Click this link to go to the "Ship Node Detail" screen to view the node details for the shipment. For more information about this screen, refer to the <i>Sterling Selling and Fulfillment Foundation: Distributed Order Management User Guide</i> .
Receiving Node	The node that is receiving the receipt.

Table 205. Shipment Status Audits, Shipment (continued)

Fields	Description
Status	The return shipment status. Click this link to go to the Shipment Status Audits screen where you can view the shipment status audits.
Has Hazardous Item	Indicates if the receipt has any hazardous item.

Table 206. Shipment Status Audits

Fields	Description
Modified By	The user who performed the modification.
Old Status	The return shipment status before the status modification.
Old Status Date	The date the return shipment entered the old status.
New Status	The return shipment status after the status modification.
New Status Date	The date and time of the status modification.
Reason Code	The reason for the modification.
Reason Text	Additional information for the reason for modification.

Shipment Dates

You can specify system dates and new dates for the shipment in this screen.

Refer to “Shipment Loads” on page 129 table for field descriptions of the shipment header panel seen in this screen.

The system dates table displays date-related information applicable either to shipments or deliveries. It does not display both shipments and deliveries together.

Table 207. Shipment Dates Screen, System Dates

Fields	Description
Requested Shipment Date	The requested shipment date associated with the shipment.
Expected Shipment Date or Optimized Appt From Date	For shipments, Expected Shipment Date displays the expected shipment date. For deliveries, Optimized Appt From Date displays the optimized date.
Actual Shipment Date	The actual shipment date associated with the shipment.
Requested Delivery Date	The requested shipment date associated with the shipment.
Expected Delivery Date or Optimized Appt To Date	For shipments, Expected Delivery Date displays the expected delivery date. For deliveries, Optimized Appt To Date displays the optimized date.
Actual Delivery Date	The actual delivery date associated with the shipment.

Table 208. Shipment Dates Screen, New Dates

Fields	Description
Date Type	The date type. For example, Shipment or Delivery.
Requested	The Buyer requested date for the date type. This field can be modified.
Expected	The expected date for the date type. This field can be modified.

Table 208. Shipment Dates Screen, New Dates (continued)

Fields	Description
Actual	The actual date for the date type. This field can be modified.

Enter the new information and click Save to update the changes made in this screen.

Shipment Alerts

You can view the alerts associated with the return shipments in this screen.

Refer to “Shipment Loads” on page 129 table for field descriptions of the shipment header panel seen in this screen.

Table 209. Shipment Alerts Screen, Alert List

Action	Description
View Details	This action lets you view the details of the alerts that were raised. For more information about this screen, see the <i>Sterling Selling and Fulfillment Foundation: Application Platform User Guide</i> .
Fields	Description
Alert ID	The alert ID. Click this link to view the alert details.
Type	The type of alert raised. For example, ON_FAILURE or FAILED_AUTH. For more information about types of alerts, see the <i>Sterling Selling and Fulfillment Foundation: Application Platform User Guide</i> .
Description	A brief description of the alert.
Queue	The queue the alert has been assigned to.
Priority	The alert priority.
Owner	The user who is handling the alert.
Raised On	The date the alert was raised.

Return Shipment Console: Return Receipt List

This screen lets you view the return receipts

Table 210. Return Release List

Actions	Description
View Summary	This action takes you to the Return Order Receipt Summary screen to view the summary of the selected return receipts.
View Details	This action takes you to the Return Receipt Details screen where you can view the details of the selected return receipts.
Close Prereceipt	This action closes the prereceipts of the selected return receipts.
Receive	This action takes you to the Receive Details screen. For more information about this screen, see the <i>Sterling Selling and Fulfillment Foundation: Warehouse Management System User Guide</i> .

Table 210. Return Release List (continued)

Close Receipt	This action closes the receipt for the selected returns.
Fields	Description
Receipt #	The receipt number.
Shipment #	The shipment number associated with the receipt.
Return #	The return number associated with the receipt.
Enterprise	The Enterprise associated with the receipt.
Buyer	The Buyer associated with the receipt.
Seller	The Seller associated with the receipt.
Receipt Start Date	The receipt start date.
Receiving Node	The receiving node associated with the node.
Receipt Open	Indicates whether or not the receipt is open or closed.
Receipt Status	The receipt status.

Additional Attributes

You can view the additional attributes associated with a return shipment.

Refer to the “Shipment Loads” on page 129 table for field descriptions of the shipment header panel seen in this screen.

Table 211. Additional Attributes Screen

Fields	Description
Overage Allowed	Indicates whether or not additional quantity can be received against the expected return shipment quantity.
Manually Entered	Indicates if the return shipment was created manually or automatically generated from an order.
Order Available On System	Indicates if the order the return shipment is associated with exists in the system.
Case Content Verification Required	Indicates if the contents of cases must be verified at the time of receipt.
Pallet Content Verification Not Required	Indicates if the contents of pallets must be verified at the time of receipt.
Shipment Entry Overridden	Indicates if information input at the time of shipment entry has been overridden.

Shipment Activity Demand

This screen provides shipment's activity demand details.

Refer to the “Shipment Loads” on page 129 table for field descriptions of the shipment header panel seen in this screen.

Table 212. Shipment Activity Demand, Product Demand

Fields	Description
Location ID	The item location in the node.

Table 212. Shipment Activity Demand, Product Demand (continued)

Activity Code	The activity to be performed on items belonging to the work order.
Item ID	A brief description of the item.
PC	The item's product class.
UOM	The item's unit of measure.
Priority	The priority of the demand.
Demand Quantity	The current demand for the item.
Satisfied Quantity	The extent to which the demand is satisfied.
Demand Satisfied	Indicates whether the demand is satisfied or not.

Table 213. Shipment Activity Demand, Container Demand

Fields	Description
Location ID	The item location in the node.
Activity Code	The activity to be performed on items belonging to the work order.
Pallet ID	The pallet LPN that belong to the work order.
Case ID	The case LPN that belong to the work order.
Priority	The priority of the demand.
Demand Satisfied	Indicates whether the demand is satisfied or not.

Return Container Search By All Attributes

You can use the Return Container Search window to perform a return container search by all attributes.

Do not use spaces before or after any text you enter in the search fields, as this may result in inconsistent or inaccurate results.

Table 214. Return Container Search by All Attributes

Fields	Description
Document Type	The document type is automatically displayed.
Return #	Enter the return number you are searching for, if applicable.
Shipment #	Enter the return number you are searching for, if applicable.
Container #	Enter the container number you are searching for, if applicable.
Container Type	Enter the type of containers you are searching for, if applicable.
Tracking #	Enter the tracking number you want to search for containers under, if applicable.
Item ID	Enter the item ID included in the containers you are searching for, if applicable.
Container SCM	Enter the container SCM you are searching for, if applicable.
Containers With Logical Kits Only	Select the check box to search for containers only with logical kits, if applicable.

Table 214. Return Container Search by All Attributes (continued)

Fields	Description
Max Records	Enter the maximum number of returns you want returned from your search.

Enter the relevant information and click Search. The Return Container List screen is displayed.

Return Container List

The Return Container List window displays the results of a return search. You can perform actions on a single return or multiple returns by selecting the check boxes of the returns you want to perform an action on and choosing the applicable action from the action bar.

Table 215. Return Container List

Actions	Description
View Details	This action takes you to the Container Details screen where you can view the details of the shipment container and perform some activities.
Pack/Unpack	This action lets you pack or unpack the container. But the node must be a WMS ship node. For more information, refer to the <i>Sterling Selling and Fulfillment Foundation: Warehouse Management System User Guide</i> .
Print	This action takes you to the "Print" on page 139 screen where you can enter the printer name and specify the number of copies required.
Delete	This action takes you to the "Delete Selected Containers" on page 141 screen where you can specify options before deleting the container.
Fields	Description
Container #	The return container's container number.
Shipment #	The return container's shipment number.
Status	The current status of the return container's shipment
Manifested	Indicates whether or not a this return container is included on a shipment manifest.
Container Type	The return container's container type.
Tracking #	The return container's tracking number.
Container SCM	The unique shipping container marking that identifies the shipper of this return container.
Ship Date	The return container's ship date.

You can perform any of the actions described above for selected containers.

Container Details

Table 216. Container Details

View Icon	Description
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Table 216. Container Details (continued)

Audit	Status Audits - This icon takes you to the Shipment Status Audits screen where you can view the list of audits performed for the shipment containers.
Actions	Description
Print	This action takes you to the "Print" on page 139 screen where you can enter the printer name and specify the number of copies required.
Void Tracking #	Click this action if you want to void the tracking number. An alert screen is displayed to confirm the deletion.
Fields	Description
Container ID	The container ID.
Container #	The container number.
Shipment #	The shipment to which the container belongs.
Container Type	The type of container used. For example, Carton or Pallet.
Ship Date	The date the container must ship by.
Container Group	The group belonging to the container.

Table 217. Container Details Screen, Container Info

Fields	Description
Carrier/Service	The Carrier and Carrier service shipping the container.
Tracking #	The container's tracking number used to track the container's status and location.
Pallet/Carton SCM	The shipment container marking number of the pallet or carton.
Declared Value	The value used to calculate customs charges. This field is only applicable to international shipments.
Weight	The weight of the container.
Height	The height of the container.
Length	The length of the container.
Width	The width of the container.

Table 218. Container Details Screen, Container Line Details

Fields	Description
Tag Details	Note: This column displays only if the item is tag-controlled. The column label that displays is the name of the unique identifier you have defined (for example, Lot #). If you have defined more than one unique identifier, the label that displays is Tag #. To view the details associated with the unpacked items, click the hypertext link.
Order #	The order number to which the line item packaged in the container belongs.
Line #	The container line number and the order line number of the line item packaged in the container.
Release #	The order release number to which the line item packaged in the container belongs.
Item ID	The item ID of the line item packaged in the container.

Table 218. Container Details Screen, Container Line Details (continued)

Fields	Description
PC	The product class of the line item packaged in the container.
UOM	The unit of measure of the line item packaged in the container.
Ship By Date	The date the container line must be shipped by.
Quantity	The quantity of the line item packaged in the container.

Print

You can print the label to apply to the container for a return shipment.

Table 219. Print

Fields	Description
Print Service Name	Select the print service name such as PrintShippingLabel.
Printer Name	Select the printer name.
No. of Copies	Enter the number of copies you want to print.

Enter the relevant information and click OK to print the labels.

Return Container Status Audits

About this task

You can view any status modifications performed against a return container.

To view return container's status audits:

Procedure

1. From the navigation bar, choose Reverse Logistics.
2. Choose Return Shipment. The Return Shipment Search window appears.
3. Search for the applicable return containers.
4. From the return container list, select the check boxes of the applicable containers.
5. From the action bar, choose View Details. The Container Details window appears.
6. From the Container action bar, choose the **Audit** icon. The Container Status Audits window appears. For more information, see the *Sterling Selling and Fulfillment Foundation: Logistics Management User Guide*.

Return Container Serial Details

About this task

To view return container's serial details:

Procedure

1. From the navigation bar, choose Reverse Logistics.
2. Choose Return Shipment. The Return Shipment Search window appears.

3. Search for the applicable return containers.
4. From the return container list, select the check boxes of the applicable containers.
5. From the action bar, choose View Details. The Container Details window appears.
6. In Container Line Details panel, click on the **Plus** icon to expand the Tag Details field. The tag control information that pertains to this container displays.
7. Click on the Serial# link. The Serial Details window appears. For more information, see the *Sterling Selling and Fulfillment Foundation: Logistics Management User Guide*.

Charges

Refer to “Shipment Loads” on page 129 for field descriptions of the shipment header panel seen in this screen.

Table 220. Charges Screen, Shipment Charges

Fields	Description
Charge Category/Charge Name	The category or name of the charge. For example, Gift Card.
Estimated Charge	The estimated charge for shipping the return shipment.
Actual Charge	The actual charge for shipping the return shipment.

Table 221. Charges Screen, Container Charges

Fields	Description
Container #	The return container's container number.
Actual Freight Charge	The Carrier's freight charge for shipping the container.

- **Adding a Return Shipment Charge** - From the Shipment Charges table, choose the **Add** icon. Enter the appropriate fields and click Save.
- **Modifying a Return Shipment Charge** - From the Shipment Charges table, locate the charge you want to modify. In Estimated Charge, enter the estimated charge for the shipment. In Actual Charge, enter the actual charge for the return shipment and choose Save.

Shipment Line Details

You can view the shipment line details in this screen.

Table 222. Shipment Line Details Screen, Shipment Lines

Fields	Description
Shipment Line #	The shipment line number.
Shipment #	The shipment number associated with the return shipment.
Enterprise	The Enterprise associated with the return shipment.
Return #	The return number associated with the return shipment.
Order Line #	The order line number associated with the return shipment.
Release #	The release number associated with the return shipment.

Table 222. Shipment Line Details Screen, Shipment Lines (continued)

Fields	Description
Item ID	The item ID associated with the return shipment.
Description	The description of the item.
Product Class	The shipment line item's product class.
Unit of Measure	The shipment line item's unit of measure.
Expected Serial #	The serial number requested in the order.
Quantity	The shipment line's expected quantity. If the Receipt is made against an order, Quantity is displayed as 0.
Received Quantity	Indicates the quantity received for the item in this shipment. If the receipt is against an order, it indicates the quantity received for the order.
Original Qty	Indicates the original quantity on the order for the item.

Table 223. Shipment Line Details Screen, Additional Attributes

Field	Description
Ship By Date	Any additional shipment dates associated with the return shipment.
Serial #	The serial number associated with the return shipment's additional attributes.
Quantity	The quantity associated with the return shipment's additional attributes.

Delete Selected Containers

This screen lets you delete the selected containers from the Return Container List screen based on some constraints.

Table 224. Delete Selected Containers

Fields	Description
Backorder Removed Quantity	Select this checkbox if you want to backorder the quantity that is being deleted.
Remove Quantity from shipment line	Select this checkbox if you want to remove the quantity being deleted from the shipment lines.

Click OK to confirm the deletion of the containers.

View Holds

You can view holds that are applied to the return shipments in this screen.

Table 225.

Fields	Description
Shipment #	The return shipment number.
Shipper's Ref. #	The return shipment reference number.

Table 225. (continued)

Fields	Description
Plan #	The delivery plan number the return shipment is associated with.
Enterprise	The enterprise associated with the return shipment.
Buyer	The identifier for the buyer.
Seller	The identifier for the seller.
Ship Node	The node from where the return shipment is shipped.
Receiving Node	The node that is receiving the return shipment.
Status	The return shipment status.
Release #	The order release number to which the return shipment line belongs.
Has Hazardous Items	Indicates if the inbound shipment contains hazardous items.
Merge Node	If you have order lines coming from multiple nodes and want to consolidate them into one load, enter a node at which you want all of the dependent order lines to be consolidated with the parent order line. Note: Merge Node is only relevant in a Deliver Together dependency.

Table 226.

Actions	Description
Add Holds	This action takes you to the Add Holds screen where you can add holds to the selected return shipment.
Fields	Description
Hold Description	A brief description of the hold.
Hold Status	The current status of the hold.
Hold Comment	Any additional comments for the hold.
Action	Select the action that you want to apply to the hold from the drop-down list.
Reason	Enter the reason for the hold.

Table 227.

Fields	Description
Hold Description	A brief description of the hold.
Reason	The reason for changing this hold to resolved status.

Add Holds

You can add holds to the inbound shipment on this screen.

Table 228.

Fields	Description
Hold Type	Select the hold type associated with the return shipment from the drop-down list.
Reason	Enter the reason for the hold.

Chapter 12. Service Work Order Console Screens

The Work Order Console provides details on service requests such as provided and delivery services.

Work Order Search By All Attributes

You can search for work orders by all attributes in this screen.

Do not use spaces before or after any text you enter in the search fields, as this may result in inconsistent or inaccurate results.

Table 229. Work Order Search By All Attributes

Fields	Description
Node	Select the node you want to search for, if applicable.
Across Nodes	Select this option if you want to search for work orders across all nodes.
Enterprise	Choose the field and lookup option to find the specific Enterprise you want use.
Across Enterprises	Select this option if you want to search for work orders across all enterprises.
Work Order #	Enter the work order number associated with the work order for which you want to search.
Order #	Select the order number associated with the work order for which you want to search.
Work Order Status	Select the work order status range for which you want to search.
Appointment Date Range	Enter the appointment date range you want to search for, if applicable.
Pre-call Status	Select the pre-call status associated with the work order you want to search for, if applicable.
Open Work Orders Only	Select the check box if you want to search for open work orders, if applicable.
Resource Pool	Enter the resource pool of the work order you want to search for, if applicable.
Service Complexity Level	Select the service complexity level of the work order you want to search for, if applicable.
Max Records	Enter the maximum number of work orders you want returned from your search.

The search results are displayed in the Work Order List screen.

Work Order List

The Work Order List window displays the results of a work order search. You can perform actions on a single work order or multiple work orders by selecting the check box(es) of the work order(s) you want to perform an action on and choosing the applicable action from the action bar.

Table 230. Work Order List

Actions	Description
View Details	Select this action to view the work order details of the selected work orders. For more information see Work Order Details screen.
Plan Appointment	Select the work order(s) for which you want to plan the appointment. This action can be performed only on work orders containing single appointments. For more information see Plan Work Order Appointment screen.
Record Completion	This action takes you to the Record Completion screen to confirm an appointment for the selected work orders.
Record Service Failure	This action takes you to the Record Service Failure screen to enter the reasons for the appointment service failure for the selected work orders.
Cancel	This action pops up the Cancel Work Order screen to provide the code and reason to cancel the work order.
Service Tools	This action takes you to the Service Tools screen to add or remove the service tools associated with the selected work orders.
Work Order #	The work order number associated with the work order. Click this link to view work order details.
Node	The node associated with the work order.
Enterprise	The Enterprise associated with the work order.
Status	The status of the work order namely, Created, Cancelled and Completed.
Multiple Appointments	A flag Y is specified if the work order has multiple appointments, else the flag is set to N.
Appointment	The current appointment schedule associated with the work order.
Pre Call Status	The current pre-call status associated with the work order.

Work Order Details

You can view the details of an work order in this screen. This screen lets you perform certain actions and enables you to view some of the associated screens.

Table 231. Work Order Details Screen, Primary Information

View Icons	Description
Alert	This icon takes you to the Work Order Alerts screen to view the alerts associated with the work order.
Audit	This icon takes you to the Work Order Status Audits screen to view the work order status audits.

Table 231. Work Order Details Screen, Primary Information (continued)

View Icons	Description
Instructions	This icon takes you to the Work Order Instructions screen to add or modify the instructions created for the work order.
Notes	This icon takes you to the Work Order Notes screen to add notes or contact information associated with the work order. If notes have been added, the Notes Check icon is displayed instead.
Service Tools	This icon takes you to the Service Tools screen to add or remove the service tools associated with the work order.
Action	
View Holds	This action lets you view and manage order holds. For more information refer to View Holds screen for field level descriptions of the screen.
Cancel	This action pops up the Cancel Work Order screen to provide the code and reason to cancel the work order.
Fields	
Work Order #	The work order number associated with the work order.
Enterprise	The Enterprise associated with the work order.
Node	The node associated with the work order.
Order #	The order number associated with the work order. Click this link to view order details.
Provider Organization	The provider organization associated with the order.
Service Item Group	The service item group code associated with the order. For example, Provided Service represents that the work order performs a Provided Service If the work order is designated as both a Provided Service and a Delivery Service, the priority goes to the Provided Service.
Status	The current status of the work order. The valid statuses are <ul style="list-style-type: none"> • Work Order Created • Work Order Completed • Work Order Cancelled
Service Complexity Level	The service complexity level for this work order.
Supervisor ID	The identifier of the service supervisor associated with this work order.

The service location address can be specified in the Service Location panel of the work order details screen. For more information refer to the Service Location screen details.

Table 232. Work Order Details Screen, Capacity Information

Fields	Description
Preferred Resource Pool ID	The preferred resource pool for the work order. If the work order contains both a Provided Service and a Delivery Service, only the Provided Service resource pool is able to be selected as a Preferred Resource Pool ID.
Preferred Resource ID	The resource ID associated with the preferred resource pool, if applicable.
Override Requested Capacity	This box is checked if the requested capacity is overridden.
Requested Capacity	The requested capacity for the work order.
Allocated Capacity	The allocated capacity for the work order. This also represents the blocked capacity when planning appointments.
Total Weight	The total capacity in terms of weight.
Total Volume	The total capacity in terms of volume.

Table 233. Work Order Details Screen, Execution Details

Fields	Description
Pre Call Status	The pre-call status associated with the work order.
Planning Complete	To indicate whether the work order planning is complete.
Multiple Appointments	To indicate whether the work order has multiple appointments.
Cancelled/Failed Appointments	The number of appointments that are cancelled or have failed. Click this link if you want to view the appointment details of cancelled or failed appointments. For more information see Work Order Appointments.

The Open Appointments panel have different actions for single and multiple appointments as described in the following table:

Table 234. Work Order Details Screen, Open Appointments

Actions	Description
Plan Appointment	This action takes you to the Plan Work Order Appointment screen if you did NOT select the Multiple Appointments checkbox when creating a work order. Note: This action is available only for single appointments.
Add	This action takes you to the Plan Work Order Appointment screen if you have selected Multiple Appointments checkbox when creating a work order. Note: This action is available only for multiple appointments.
Change	This action takes you to the Plan Work Order Appointment screen to modify an existing appointment for a work order. Note: This action is available only for multiple appointments.
Record Completion	This action takes you to the Record Completion screen to complete the appointment.
Record Failure	This action takes you to the Record Service Failure screen to enter the service failure reasons for the appointment.

Table 234. Work Order Details Screen, Open Appointments (continued)

Actions	Description
Cancel	This action pops up a Modify Work Order screen to cancel the selected appointment.
View Execution Details	This action lets you view the Execution Details screen for completed appointments.
Fields	
Sequence No.	The sequence number of the appointments.
Appointment	The current appointment date and time.
Appointment Overridden	Specifies whether the appointment is overridden.
Allocated Capacity	Specifies the allocated capacity for the appointment.
Resource Pool ID	The associated resource pool ID of the appointment.
Resource ID	The associated resource ID of the appointment.
Appointment Status	The current status of the appointment. The valid statuses are: <ul style="list-style-type: none"> • Open • Failed • Cancelled • Completed

You can add or remove service lines from a work order in the Service Lines panel.

Table 235. Work Order Details Screen, Service Lines

Actions	Description
Add Line	This action takes you to the Add Service Lines screen to add service lines to the work order.
Remove Line	This action removes the selected service lines by popping up the Modify Work Order screen. Enter the relevant information and select OK. The selected service lines are removed.
Fields	
Item Related Info	The item name and the description is provided. Click this link to view service request details.
Item Group Code	The group code of the service item is specified. For example, if the service is a Provided Service then the item group code is Provided Service.
Required Quantity	The quantity of the service items required.

You can add or remove the products that are to be delivered as part of the work order.

Table 236. Work Order Details Screen, Products Being Delivered

Actions	Description
Add Line	This action takes you to the Add Products Being Delivered screen if you want to add a product with a delivery service.
Remove Line	This action removes the selected product lines by popping up the Modify Work Order screen. Enter the relevant information and select OK. The selected product lines are removed.

Table 236. Work Order Details Screen, Products Being Delivered (continued)

Actions	Description
Fields	
Item Related Info	The item name and description is provided. Click this link to view service request details.
PC	The item's product class.
UOM	The item's unit of measure.
Required Quantity	The requested quantity by the service.
Delivered Quantity	The quantity to be delivered.

The work order is confirmed once the appointment and associated service lines are completed.

Work Order Alerts

A list of alerts raised for a work order can be viewed in this screen. From the Alerts table, find the alert you want to view and click on the Alert ID link. The Alert Console appears. For more information about using the Alert Console, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

Table 237. Primary Information

Fields	Description
Work Order #	The work order number associated with the work order.
Enterprise	The Enterprise associated with the work order.
Node	The node associated with the work order.
Order #	The order number associated with the work order. Click this link to view order details.
Provider Organization	The provider organization associated with the order.
Service Item Group	The service item group code associated with the order. For example, Provided Service represents service group code for Provided Service
Status	The current status of the work order. The valid statuses are <ul style="list-style-type: none"> • Work Order Created • Work Order Completed • Work Order Cancelled
Service Complexity Level	The service complexity level for this work order.
Supervisor ID	The identifier of the service supervisor associated with this work order.

Table 238. Alerts

Actions	Description
View Details	This action takes you to the alert detail screen for the selected alert ID. For more information about viewing the alert details, see the <i>Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide</i> .

Table 238. Alerts (continued)

Actions	Description
Fields	
Alert ID	The alert ID. Click this link to view the alert details.
Type	The type of alert raised. For example, ON_FAILURE or FAILED_AUTH.
Description	A brief description of the alert.
Queue	The queue the alert has been assigned to.
Priority	The alert priority.
Owner	The user who is handling the alert.
Raised On	The date the alert was raised.

Work Order Status Audits

You can view any status modifications performed against a work order in the Work Order Details screen.

Table 239. Primary Information

Fields	Description
Work Order #	The work order number associated with the work order.
Enterprise	The Enterprise associated with the work order.
Node	The node associated with the work order.
Order #	The order number associated with the work order. Click this link to view order details.
Provider Organization	The provider organization associated with the order.
Service Item Group	The service item group code associated with the order. For example, Provided Service represents service group code for Provided Service
Status	The current status of the work order. The valid statuses are <ul style="list-style-type: none"> • Work Order Created • Work Order Completed • Work Order Cancelled
Service Complexity Level	The service complexity level for this work order.
Supervisor ID	The identifier of the service supervisor associated with this work order.

Table 240. Work Order Status Audits Screen, Status Audits

Fields	Description
Sequence #	The sequence number associated with the work order. Click on the Plus icon to view and hide sequence details. The fields that can be viewed when expanded are explained below: <ul style="list-style-type: none"> • Attribute -he name of the modified field. • Old Value - The old value of that field before modification. • New Value - The new value of that field after modification.

Table 240. Work Order Status Audits Screen, Status Audits (continued)

Fields	Description
Audit Time	The time the work order was audited.
Action	The action performed on the work order.
Modified By	The user that performed the modification.
Reason	The reason for the modification.
Comments	Additional information as to why the modification was made.

Work Order Instructions

You can view or modify instructions for a work order in this screen.

Table 241. Instructions Window

Action	Description
Delete Instruction	This action enables you to delete the selected instructions. Upon clicking this action, an alert window appears to confirm the deletion of instructions.
Fields	
Instruction Type	The type of instruction, such as Gift, Pick, Pack, Ship, or Other.
Text	The specific instructions to be performed on the order. Specify the instruction URL next to the Instructions URL icon.

Work Order Notes

Miscellaneous information may need to be stored on a work order. For example, the contact information of the individual to whom a product is being delivered, or for whom a service is being provided, may need to be entered and stored. Various execution details may also need to be entered while the work order is being planned or completed, like notes.

Service Tools

You can add tools on a work order that can be used to perform the necessary services, for instance a latter, or a tool kit.

Table 242. Service Tools Screen, Service Tools

Action	Description
Remove	This action removes the selected service tools from the list.
Fields	
Service Tool ID	The identifier of the service tool.
UOM	The unit of measure for the service tool.
Short Description	The short description of the service tool.
Required Quantity	The quantity of the service tool that is required to perform this work order.

Table 242. Service Tools Screen, Service Tools (continued)

Action	Description
Comments	Any additional comment.

View Holds

Work orders can be placed on hold, preventing them from being processed by certain transactions, and preventing certain modification types from being applied. Using the Applications Manager, you can configure which transactions and modification types are disallowed for a work order on a particular hold type. Additionally, hold types can be configured to be applied automatically, for instance on work order creation, or upon resolution of another hold. For more information about defining and configuring hold types, see the *Sterling Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.

Table 243. Work Order Holds Screen, Work Order Holds

View Icons	Description
View History	This icon takes you to the View History screen, where you can view the hold's history.
Action	
Add Holds	This action takes you to the Add Holds screen, where you can add holds to an order.
Fields	
Hold Description	The description of the hold.
Hold Status	The status of the hold. Holds can either be in created, resolved, or rejected status.
Hold Comment	The reason for applying this hold to the order, or changing the status of the hold.
Action	Select from the drop-down list the status to which you want to move this hold.
Reason	Enter the reason for changing the status of this hold.

Table 244. Work Order Holds Screen, Resolved Holds

View Icons	Description
View History	This icon takes you to the View History screen, where you can view the hold's history.
Fields	
Hold Type	The description of the hold.
Reason	The reason for changing this hold to resolved status.

Click Save to update the changes made in the screen, and close it.

Add Holds

You can add a hold to a work order, if that hold is not already being applied to the work order in created or rejected status. If you add a hold that was previously applied and now in resolved status, it removes that hold from the list of approved holds, and reset its status to created. That hold maintains its previous history records for that work order, and further status modifications is added on to that history.

Table 245. Add Holds Screen, Work Order Holds

Fields	Description
Hold Type	Select the hold type you want to apply to the order from the drop-down list.
Reason	Select the reason for adding this hold to the order.

Click Save to close this screen and apply the selected hold to the work order.

View History

Every time the status of a work order hold changes, useful information regarding the status change is recorded in Sterling Selling and Fulfillment Foundation. You can view, in this screen, the history of a work order hold.

Table 246. Hold History Screen, Work Order Holds

Fields	Description
Hold Type	The hold type for which the history is being displayed.
Date/Time	The date and time when the hold's status changed.
User ID	The user who performed the change on the hold.
Status	The status that the hold was moved to.
Comment	The reason for the hold's creation or status change, if applicable.
Hold Transaction	The transaction responsible for the hold's status change.

Service Location

Table 247. Service Location Screen, Address

View Icons	Description
Address Details	Address Details - Choose this icon to modify or add a service location address in the Service Location panel of the Work Order Details screen.
Additional Questions	Additional Address Questions - Choose this icon to view or modify answers to address questions for this ship to address. If any questions have already been answered, a Additional Questions Check icon is displayed. For more information about the screen that is displayed, see the Questions screen.

Table 247. Service Location Screen, Address (continued)

View Icons	Description
Permit Questions	<p>Permit Questions - Choose this icon to view or modify answers to permit questions for this ship to address.</p> <p>If any questions have already been answered, a Permit Questions Check icon is displayed.</p> <p>For more information about the screen that is displayed, see the Questions screen.</p> <p>This icon is only available at the order level.</p>
Fields	
Address Line 1	The ship to address line 1.
Address Line 2	The ship to address line 2.
Address Line 3	The ship to address line 3.
Address Line 4	The ship to address line 4.
Address Line 5	The ship to address line 5.
Address Line 6	The ship to address line 6.
City	The city where the service has to be performed.
State	The state to which the city belongs to.
Postal Code	The postal code of the city.
Country/Region	The country or region where the service has to be performed.
First Name	The vendor's first name.
Middle Name	The vendor's middle name.
Last Name	The vendor's last name.
Company	The company name of the vendor.
Day Time Phone	The vendor's day time phone number.
Evening Phone	The vendor's evening time phone number.
Mobile Phone	The vendor's mobile number.
Fax	The fax number.
E-mail	The vendor's e-mail address.
Additional Address and / or Permit Questions have been answered for this address.	<p>This field is shown when additional address and/or permit questions have been answered for this address.</p> <p>Selecting the Retain Existing Answers radio button saves the answers for this address. Selecting Clear Answers clears all answers for this address.</p>

Click Save to update any modifications in the screen.

Plan Work Order Appointment

You can take work order appointments in this screen. If you are planning a single appointment work order select Plan Appointment in the Work Order Details screen. Instead if the work order consists of multiple appointments you can choose Add in the Open Appointments panel of the Work Order Details screen or Change to modify an existing work order.

Table 248. Plan Work Order Appointment Screen, Work Order

Action	Description
Save AppointmentS	The work order appointment is saved with the help of this action. Upon clicking Save Appointment the Modify Work Order screen appears. Enter the relevant information and click OK.
Fields	
Work Order #	The work order number associated with the work order.
Enterprise	The Enterprise associated with the work order.
Node	The node associated with the work order.
Order #	The order number associated with the work order. Click this link to view order details.
Provider Organization	The provider organization associated with the order.
Service Item Group	The service item group code associated with the order. For example, Provided Service represents service group code for Provided Service
Status	The current status of the work order. The valid statuses are <ul style="list-style-type: none"> • Work Order Created • Work Order Completed • Work Order Cancelled
Service Complexity Level	The service complexity level for this work order
Supervisor ID	The supervisor on this work order.

Table 249. Plan Work Order Appointment Screen, Constraints

Action	Description
Product Availability	The availability of the product can be found by selecting this action. This action takes you to the Product Availability screen where you can view the available products necessary to fulfill the appointment.
Fields	
Waiting for Sequence Line	This flag is set to inform if there is any wait for sequence line completion before scheduling the appointment.
All Product Lines Available	This flag is set to Y if all products are available.
Constraints window	Mentions if there are any constraints applicable for the work order.

Table 250. Plan Work Order Appointment Screen, Override

Action	Description
Resource Availability	The resource pool details can be obtained by selecting this action. This action takes you to the Resource Availability screen where you can view the available resources necessary to fulfill the appointment.
Fields	
Consider Supplemental Capacity	Check this option if you want to consider supplemental capacity when looking for available resources for this appointment.

Table 250. Plan Work Order Appointment Screen, Override (continued)

Action	Description
Resource Pool	Select the resource pool applicable for overrides, if applicable.
Ignore Product Availability	Check this option if you want to ignore product availability during the capacity inquiry.
Resource ID	Select the resource ID applicable for overrides, if applicable.
Ignore Node Notification Time	Check this option if you want to ignore the node's requested minimum notification time during appointment inquiry and update.

Table 251. Plan Service Appointment Screen, Available Slots

Fields	
Currently Chosen Appointment Slot	By default, the first available date and time displays. If overridden, it updates to reflect the values you choose.
Start Date	The first day displayed in the available slots table. Choose the Calendar lookup to change the date.
Number of Days to Consider	Enter the number of days beyond the start date that display in the available slot table. If the date for which you would like to schedule the service appointment does not appear within the available slots panels, you can increase this value to see available slots past what is currently displayed. To refresh the available slots table to new dates, enter a value and choose Go.
Requested Capacity	The capacity requested to plan the appointment duration. This field cannot be modified for single appointment work orders since the entire requested capacity is assumed. For multiple appointment work orders, the entire requested capacity minus the allocated capacity appears in this field. This number can be adjusted based on your needs. The chosen appointment is planned with this amount of capacity. If you intend to change the requested capacity, the GO button must be clicked before an appointment can be taken. This is to make sure that there is sufficient capacity available in the chosen slot to accommodate the new requested capacity value. The requested capacity can be zero but cannot be negative.
Slot (Start Time - End Time)	The name of time slot and the range of time each time slot spans. There is one row for each time slot. Time slots do not overlap.

Table 251. Plan Service Appointment Screen, Available Slots (continued)

Fields	
Available Slots Calendar	<p>The first available time slot is automatically highlighted. Select this to choose the first time slot. Time slot availability is indicated by:</p> <ul style="list-style-type: none"> • Add icon - The time slot has sufficient capacity. Select to make this the Currently Chosen Appointment Date. • Delete icon on a white or blue background - The time slot does not have sufficient capacity. • Add Preferred icon - The time slot is the preferred time slot for this customer. • Delete icon on a gray background - The region is not serviced for the time slot. • A gray background - The time slot is never serviced.

The Available Slots inner panel on this screen does not display the days graph or the calendar when there is no available capacity for the resource pool.

Product Availability

The availability of the products can be viewed in this screen to make appointment changes.

Table 252. Product Availability Screen, Product Availability

Actions	Description
ATP Options	The item or items availability to promise options can be viewed by selecting this action. For more information about ATP options, see the <i>Sterling Selling and Fulfillment Foundation: Global Inventory Visibility User Guide</i> .
Changes Nodes	This action takes you to the Change Nodes screen, when you can change the Ship Node or Procurement Node for this item.
Fields	
Item ID	The product item ID.
PC	Product class of the item.
UOM	The unit of measure of the item.
Item Description	The item description.
Ship Node	The item's ship node.
Procure From Node	The item's procurement node. A Warning Indicator icon indicates that the item is awaiting acceptance from a store or node.
Available Quantity	The available quantity of the item's inventory.
Available Date	The item's available date for shipping or performing the work order.
Future Availability Date	The future availability date as indicated by a user.
Comments	Comments as indicated by a user.

Click Save to update any changes made to this screen.

Change Nodes

Table 253. Change Nodes

Fields	Description
Order #	The order number.
Line #	The line number.
Item ID	The item identifier.
Unit of Measure	The unit of measure for this item.
Product Class	The product class for this item.
Ship Node	The ship node for this item. To change the ship node, enter a new ship node or select the Lookup icon which takes you to the node lookup screen.
Procure From Node	The procurement node for this item. To change the procurement node, enter a new procurement node or select the Lookup icon which takes you to the node lookup screen.

Click Save to save changes.

Resource Availability

The availability of the resources can be viewed in this screen.

Table 254. Resource Availability Screen, Resource Pool

Fields	Description
Resource Pool	The name of the resource pool associated with the work order.
Resource Pool Description	The description of the resource pool.
Node	The ship node of the resource pool.
Capacity Organization	The organization of the capacity node.
Supervisor ID	

Table 255. Resource Availability Screen, Resource Availability

Fields	Description
Start Date	The first day displayed in the available slots table. Choose the Calendar lookup to change the date.
Number of Days To Display	Enter the number of days beyond the start date that display in the available slot table. If the date for which you would like to view the capacity details does not appear within the available slots panels, you can increase this value to see available slots past what is currently displayed. To refresh the available slots table to new dates, enter a value and choose Go.
Resource ID	The identification of the resource associated with the appointment.

Record Completion

The appointment record can be completed by entering the information in the Execution Information panel and by selecting the associated service and product lines.

Table 256. Record Completion Screen, Team Members

Fields	
User ID	The identifier of a team member associated with this appointment.
User Name	The name of a team member associated with this appointment.

The list of team members gets automatically populated by Sterling Selling and Fulfillment Foundation if a resource ID is selected on the appointment, and if team members have been assigned to that resource in the Applications Manager. For more information about assigning team members to a resource, refer to the *IBM Sterling Global Inventory Visibility: Configuration Guide*.

Table 257. Record Completion Screen, Service Lines

Fields	Description
Item Related Info	The item name and the description is provided.
Item Group Code	The group code of the service item is specified. For example, if the service is a Provided Service then the item group code is Provided Service.
Required Quantity	The quantity of the service items required.

Table 258. Record Completion Screen, Products Being Delivered

Fields	Description
Item Related Info	The item name and description is provided.
PC	The item's product class.
UOM	The item's unit of measure.
Quantity To Be Delivered	The requested quantity to be delivered by the service.
Actual Delivered Quantity	The quantity that was actually delivered by the service.

Click the Complete button to record the service completion once the details are entered in the fields.

Record Service Failure

You can record reasons for service failure from the Work Order Details screen or from the Work Order List screen by selecting single appointments only. For multiple appointments the failure reasons can be recorded only from the work order details screen.

Table 259. Record Completion Screen, Team Members

Fields	
User ID	The identifier of a team member associated with this appointment.
User Name	The name of a team member associated with this appointment.

The list of team members gets automatically populated by Sterling Selling and Fulfillment Foundation if a resource ID is selected on the appointment, and if team members have been assigned to that resource in the Applications Manager. For more information about assigning team members to a resource, see the *IBM Sterling Global Inventory Visibility: Configuration Guide*.

Click Save after entering the relevant information for the service failure.

Work Order Appointments

You can view cancelled or failed appointments by selecting the link for Cancelled/Failed Appointments in the Work Order Details screen Execution Details panel.

Table 260. Work Order Appointments Screen, Closed Appointments

Actions	Description
View Details	This action takes you to the Execution Details screen where you can view the details of failed appointments. Note: You cannot view the details of the cancelled appointment.
Fields	
Sequence No.	The line sequence number. Click this link to view the Execution Details screen.
Appointment	The confirmed or cancelled appointment date and time.
Appointment Overridden	Specifies the value of appointment overridden flag.
Allocated Capacity	The allocated capacity of the appointment line.
Resource Pool ID	The identification of the resource pool associated with the appointment.
Resource ID	The identification of the resource associated with the appointment.
Appointment Status	Specifies the current status of the appointment. The valid statuses are: <ul style="list-style-type: none"> • Open • Failed • Cancelled • Completed

Execution Details

You can view the execution details of an appointment by selecting the View Execution Details action in the Work Order Details screen, Open Appointment panel.

You cannot view the details for the cancelled appointments.

Table 261. Record Completion Screen, Team Members

Actions	Description
Remove	This action removes the selected team members from the list of team members associated with this appointment.
Fields	
User ID	The identifier of a team member associated with this appointment.
User Name	The name of a team member associated with this appointment.

The list of team members gets automatically populated by the Sterling Selling and Fulfillment Foundation if a resource ID is selected on the appointment, and if team members have been assigned to that resource in the Applications Manager. You can add team members by clicking the **Add** icon. For more information about assigning team members to a resource, see the *IBM Sterling Global Inventory Visibility: Configuration Guide*.

Add Service Lines

You can add service lines to the work order details with the help of this screen.

Table 262. Add Service Lines Screen, Provided Services

Fields	Description
Item ID	The provided service item ID.
Description	The provided service item description.
Ship Node	The shipping node associated with the service
Line Qty	The service item quantity.

Table 263. Add Service Lines Screen, Delivery Services

Fields	Description
Item ID	The delivery service item ID.
Description	The delivery service item description.
Ship Node	The shipping node associated with the delivery.
Line Qty	The delivery item quantity.

Click Save after selecting the relevant provided services and delivery services.

Add Products Being Delivered

The products being delivered is added to the work order using this screen.

Table 264. Adding Products Being Delivered Screen, Products Being Delivered

Fields	Description
Item ID	The item ID to be delivered.
PC	Product class of the item.
UOM	The unit of measure of the item.
Description	The item description.
Ship Node	The item's ship node.
Delivery Date	The requested delivery date of the product on the order line.
Required Qty	The item's required quantity.

Click Save once the relevant products are added.

Modify Work Order

The modify work order window appears when you make modifications to the work order details or work order appointment screens.

Table 265. Modifying a Work Order

Field	Descriptions
Reason Code	Select the reason code for work order modification.
Comments	Additional information about why the work order was modified.

Cancel Work Order

You can provide a cancellation code and reason for cancelling a work order.

Work order cancellation depends on the status of the service lines. If the work order contains any service lines that are completed and any products that are delivered, the work order status is marked as Completed and any remaining open appointments are Cancelled and their allocated capacity is removed from the associated resource pool.

Table 266. Cancel Work Order

Field	Descriptions
Reason Code	Select the reason code for work order cancellation.
Comments	Additional information about why the work order was cancelled.

Questions

The address or permit questions and answer options displayed on this screen are preconfigured. For more information about configuring questions and answer options, refer to the *Sterling Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.

Once you have selected or entered your necessary answers, click Save.

Chapter 13. Serviced Area Search Screens

The serviced area search console allows you to check whether an enterprise services a particular postal zip code through a seller organization for a given service type. Sterling Selling and Fulfillment Foundation looks for available resources and capacity across all the resource pools for the user's enterprise.

Serviced Area Search

This search screen determines whether or not the requested service type is serviced for the a given enterprise, seller organization and postal code, and whether capacity is currently available for each time slot of each day.

If no zip code is entered in the search screen, Sterling Selling and Fulfillment Foundation behaves in one of the following ways:

- If a region or set of regions is not defined by a set of zip codes, Sterling Selling and Fulfillment Foundation returns the service availability for that region or set of regions.
- If all the regions are defined by postal zip codes, Sterling Selling and Fulfillment Foundation returns no service availability.

Table 267. Serviced Area Search

Fields	Description
Enterprise	From the drop-down list, select the enterprise that is responsible for the services.
Seller	From the drop-down list, select the seller organization that provides the services.
Country/Region	This field is defaulted to the country or region of the user that is logged in.
Service Type	From the drop-down list, select the service type that you want to search for. This field is mandatory.
Postal code	Enter the postal code that you want to search for.

The Serviced Area List screen is displayed as a result of this search.

Serviced Area List

This list screen displays whether or not the service type for the requested postal code is serviced for each time slot, and for each day.

Table 268. Serviced Area List Screen, Available Slots

Fields	Description
Slot (Start Time- End Time)	Indicates the time slots associated with this region.

Table 268. Serviced Area List Screen, Available Slots (continued)

Fields	Description
Days of Week	<p>If the requested postal code is serviced for the day of the week and capacity is available, a green checkmark appears.</p> <p>If the requested postal code is serviced for the day the week but capacity is not available, a red cross appears.</p> <p>If the requested postal code is not ever serviced for the day of the week, a grey background appears, with no icon on top of it.</p>

Chapter 14. Route Entry Screens

The route entry console allows you to plan the route of a node's resources throughout the day. For example, a resource that has 4 appointments in a given day may want to sequence them in the most efficient possible way by specifying stop numbers, and expected start time for each appointment.

Work Order Appointments Search

This screen looks for open appointments in a time range for a given node. A resource pool and a resource can be specified to narrow down the search. Otherwise, all appointments within the specified time range for all the resource pools and resources for a node is returned.

Table 269. Work Order Appointments Search

Fields	Description
Node	Enter the node from which the provided or delivery services are being performed.
Delivery Service	Check this if you want to look for delivery service appointments.
Provided Service	Check this if you want to search for provided service appointments.
Resource Pool	From the drop-down list, select the resource pool whose appointments you want to search for.
Resource	From the drop-down list, select the resource whose appointments you want to search for.
Appointment Start Date	Select the start date of the appointments you are searching for.

The Route Entry screen is displayed as a result of this search.

Route Entry

This screen displays the list of appointments, grouped by resource pool.

Table 270. Route Entry Screen, Work Order Appointments

Actions	Description
Override Team Members	This action takes you to the Override Team Members screen, where you can override the default team members for all the selected appointments.
Fields	
Work Order # / Appt #	The appointment number, and work order number in which that appointment is defined.
Promised Appointment	The date and time of the appointment.
Resource	From the drop-down list, select the resource responsible for completing the appointment.

Table 270. Route Entry Screen, Work Order Appointments (continued)

Actions	Description
Stop #	Enter which stop number this appointment corresponds to in your resource's route.
Expected Start Time	Enter the expected start time of the appointment.
Expected End Time	Enter the expected end time of the appointment.

Click Save to update the routing information for the modified appointments.

Override Team Members

This screen allows you to override the list of assigned team members to an appointment. Overriding team members resets the list of team members for an appointment, and replace it anew.

Table 271. Override Team Members Screen, Team Members

Fields	Description
User ID	The identifier of the team member to be associated with the selected appointments.
User Name	The name of the team member to be associated with the selected appointments.

Use the **Add** icon to add new team members, and click Save once you are done.

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