Sales Return Flow

Overview

If products are returned by customers, the sales return process can be initiated on the shop floor with the Sales Return Flow on the Mobile Client.

Important Note:
The Sales Return Flow is designed to handle inventory items.

Currently, the Sales BoM parent item is not managed during the Sales Return Flow and the parent item of the SALES BoMs will not be added to the new document. After the Return document is created, the non-inventory lines will remain open on the Return Request.

The components of the Sales BoM can be returned using a Return Document.

Configuration

1. If a reason must be selected when the item is returned, open the Item Master Data window and go to Produmex tab > Sales tab and enable the *Enter Reason for Sales Return* option.

2. Define the default quality status for the returned item. Open the Organizational Structure and on the Defaults tab define the quality status in the Quality Status Sales Return drop-down menu.

If a different quality status must be defined for a a given item, open the Item Master Data window and go to Produmex tab > Sales tab and enable the *Default Quality Status for Sales Return* option.

3. Define the batch number format and settings on the Batch number generator for sales return controller.

4. If multiple items or batches are not allowed on a returned logistic unit, enable the *Force Mono Lot Pallet?* option on the Sales Return Generator. In this case a new logistic unit must be created for each item during the Sales Return Flow and separate Sales Return documents are created for the different logistic units.
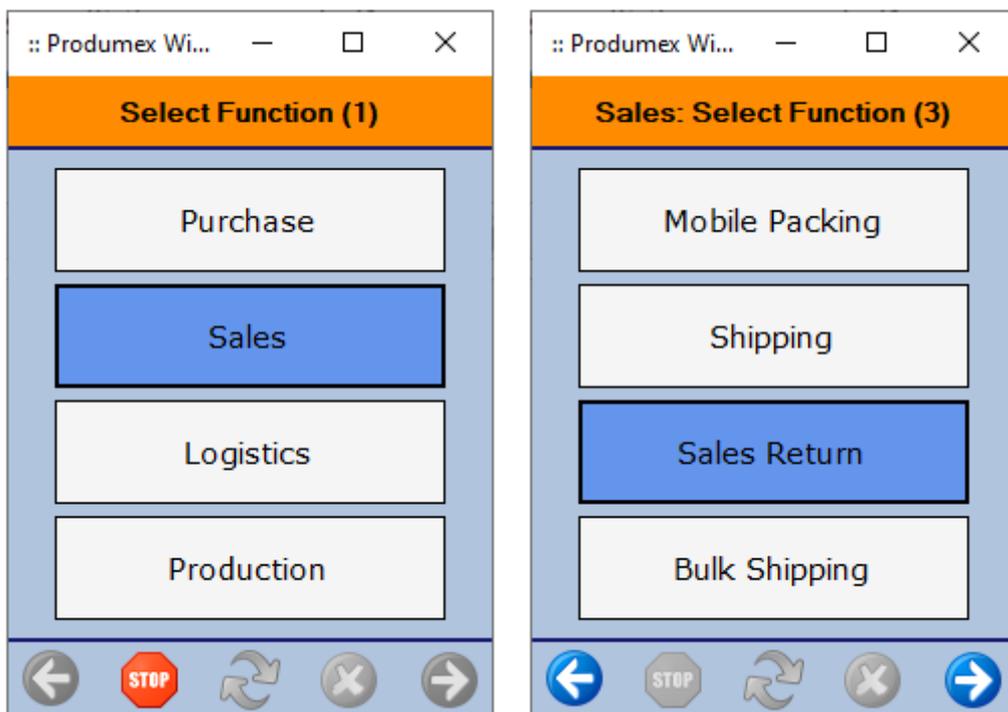
Sales Return Flow steps

- Sales Return Flow
- Select a customer

- Select a task
- Scan a barcode
- Scan a product
- Identify batch number / BBD
- Enter the quantity
- Add more products
- Scan destination location / SSCC
- Returned item is added
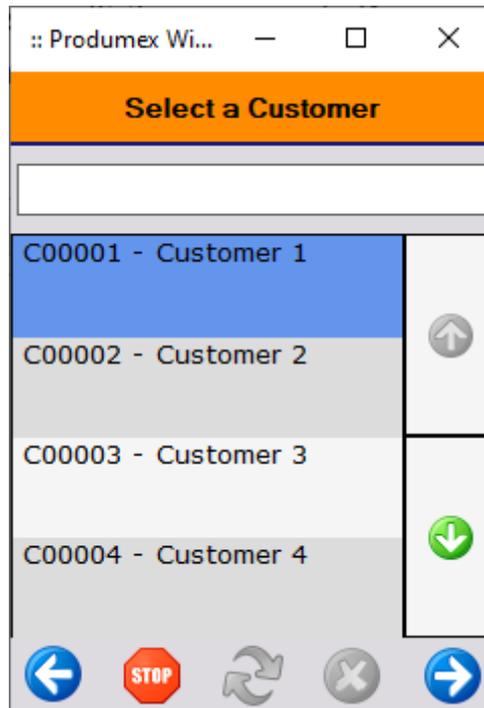- Add more products

1. Start the flow

On the Mobile Client select Sales > Sales Return.

2. Select a customer

Select the customer. On the screen every Business Partner with *Customer* type is listed.

3. Select a task

Select a task from the following options:

- Select a return request: Tap the `Select a return request` button to receive returned items based on a Return Request. On the next screen select the return request. Every open and approved return request for the selected customer is listed on the screen. Produmex WMS supports standalone Return Requests and Return Requests created based on Delivery documents. Return Requests based on A/R Invoices are not supported. However, there are workarounds for this (see below).

- Select a delivery: Tap the `Select a Delivery` button to receive returned items based on an open delivery. On the next screen select the delivery. Every open delivery for the selected customer is listed.

- No delivery: Tap the `No Delivery` button to receive the returned items without a delivery and continue with step 4. Scan a barcode.

> **There are options to return goods linked to an A/R invoice:**
>
> - Book a sales return on the Mobile Client with the No delivery task. Returned stocks are received, but the sales return document are not linked to the A/R invoice.
> - Book a credit note/credit memo document in SAP Business One. It is not supported by Produmex WMS.
> - Return-Drafts based on a Return Request without a linked document will also work as a workaround.
> - When using Return Request for an A/R invoice and conducting the return with WMS on the Mobile Client, the return Request should not be linked to the A/R invoice, instead a standalone Return Request should be created.

4. Scan a barcode

Scan the barcode of the returned item. The delivery information of the item is retrieved from the barcode.

If there is no logistic label, tap the `No label on logistic unit` button.

5. Scan a product

Scan the item or tap the `Select a product` button and select it from the list.

- If the logistic label contains only one item, the system automatically proceeds with the item and skips this screen.
- If the return is executed based on a delivery, only items from the delivery document can be scanned or selected.
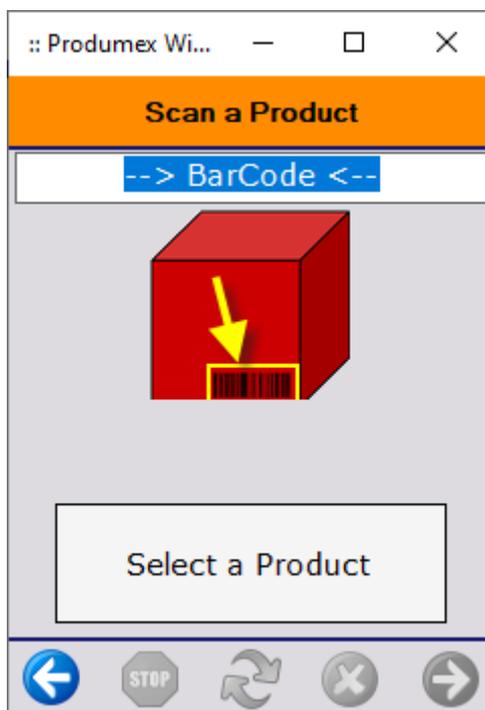

6. Identify batch number / best before date

If the item is managed by batch numbers and/or has a best before date and this information is not included in the barcode, specify the batch attributes and the best before date as well. For more information please see: Screens for entering additional information.

The default batch number is generated based on the settings of the Batch number generator for sales return.

When receiving the returned items based on a Delivery or a Return Request that is linked to the delivery (or based on an invoice linked to a delivery), only batch numbers linked to the delivery document can be returned.

Select the batch number / best before date from the list. If there is only one batch linked to the Delivery document, the system automatically selects that batch number and skips this screen.
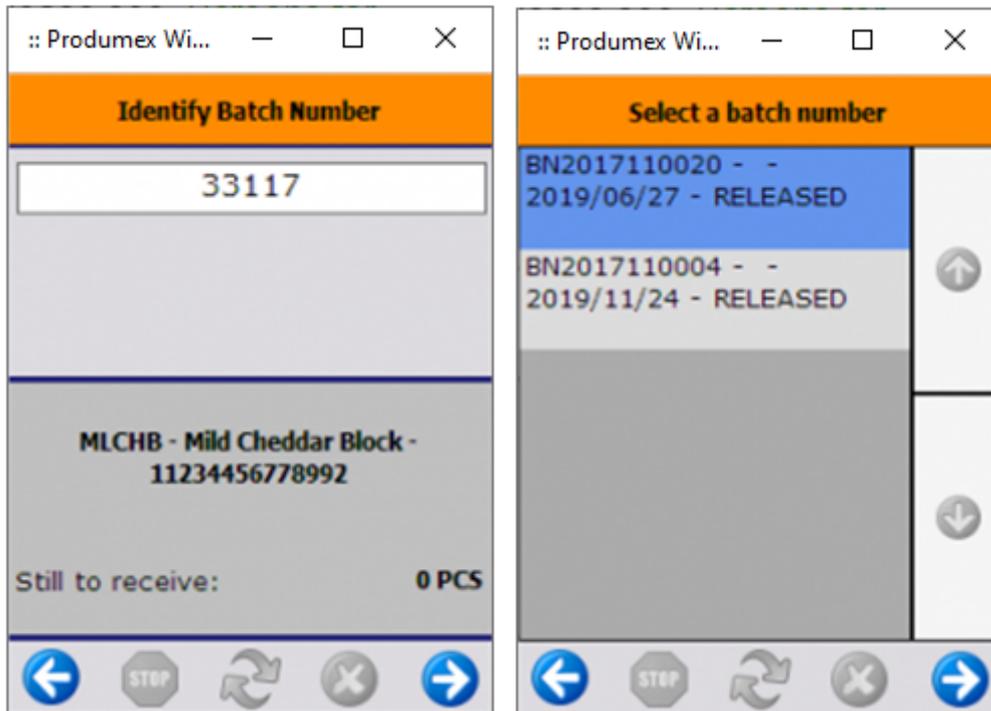
7. Enter the quantity

Add the number of the returned items. For more information about adding quantity see Screens for entering additional information.

When receiving returned items based on a delivery, the number of the returned products cannot exceed the open quantity on the delivery document.


If the Enter reason for sales return option is enabled on the Produmex Sales tab of the Item Master data of the returned item,the system displays the Enter Reason screen. Select a reason from the list. Every reason that can be used for sales return is listed.

8. Add more products

Specify whether there are additional items to return.

If you tap Yes, the system goes to the Scan barcodes GS1 label screen. An additional Add the Returns button is displayed on the screen. Tap the button to receive the returned item.

With the No button you can finish the return process. If the Force mono lot pallet? option is enabled on the Sales return generator, this screen is automatically skipped because different items/batches must be received onto separate logistic units.
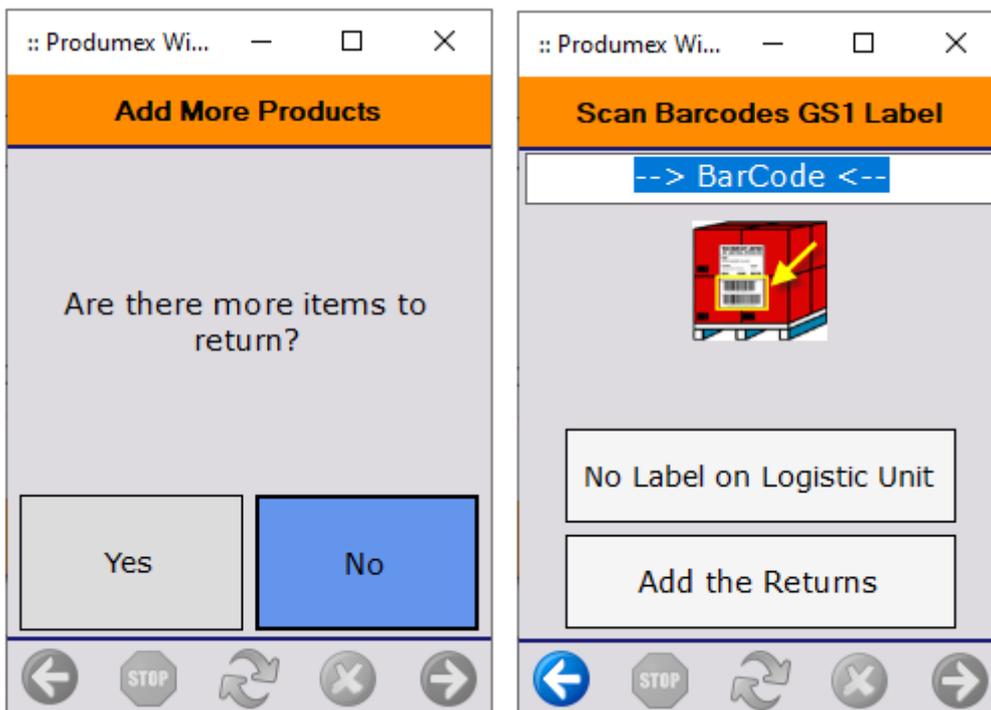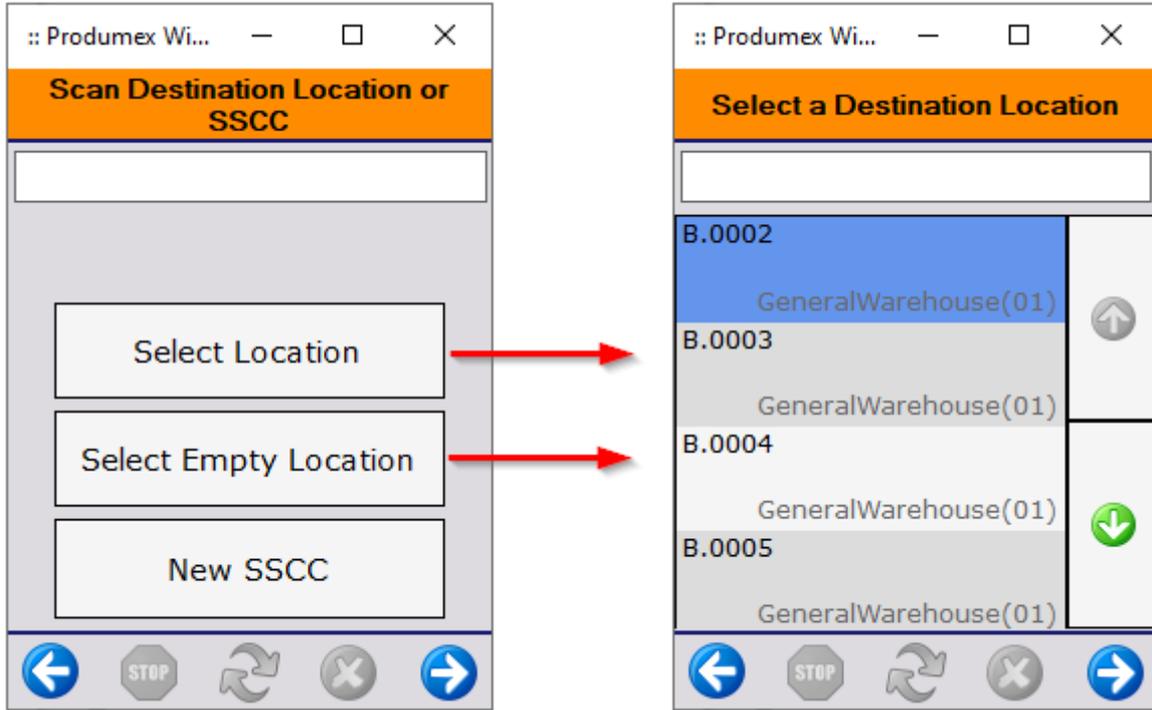
9. Scan destination location / SSCC

If there is no more item, the system displays the Scan Destination Location or SSCC screen.

To add the returned items onto an existing logistic unit, scan the SSCC of that logistic unit. If the scanned SSCC is not in stock, identify the destination location on the next screen.

To add the returned items without a logistic unit, scan the destination location or tap the Select location or the Select empty location button and select it from a list.

- Select location button: Every active location is listed from the warehouses defined for the scanner.
- Select empty location button: The system lists only the empty locations of the warehouse(s).

To create a new logistic unit, tap the New SSCC button. On the next screen scan the destination location or tap either the Select location or the Select empty location button and select it from a list.
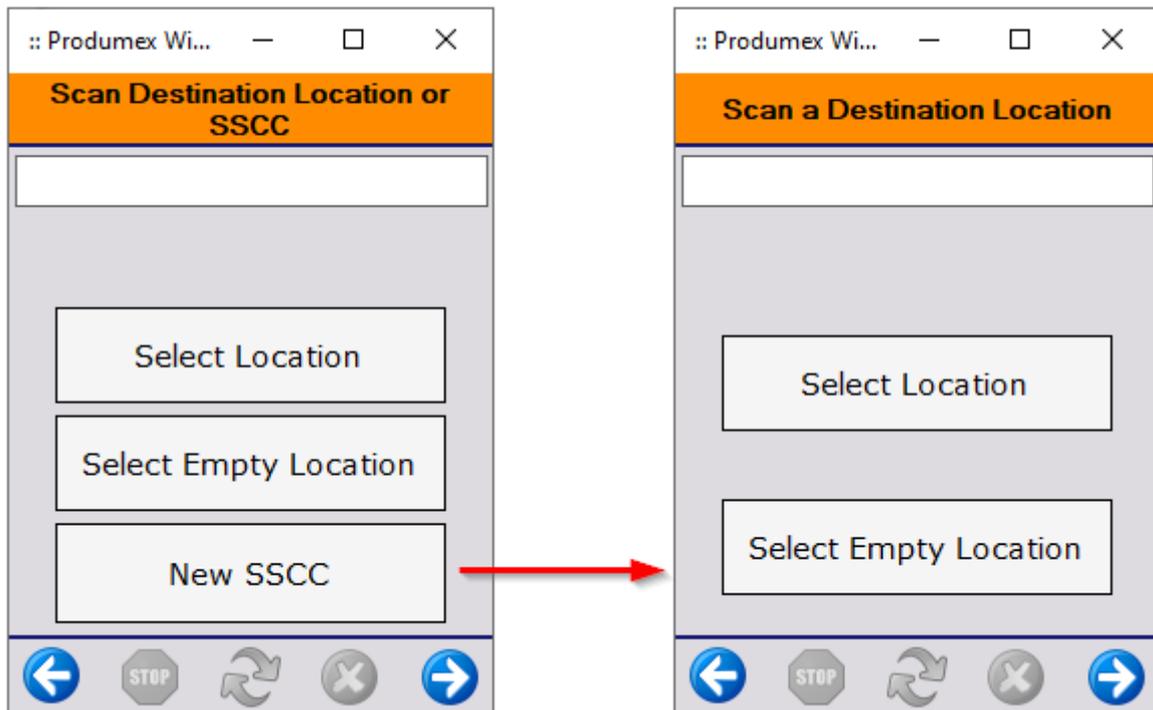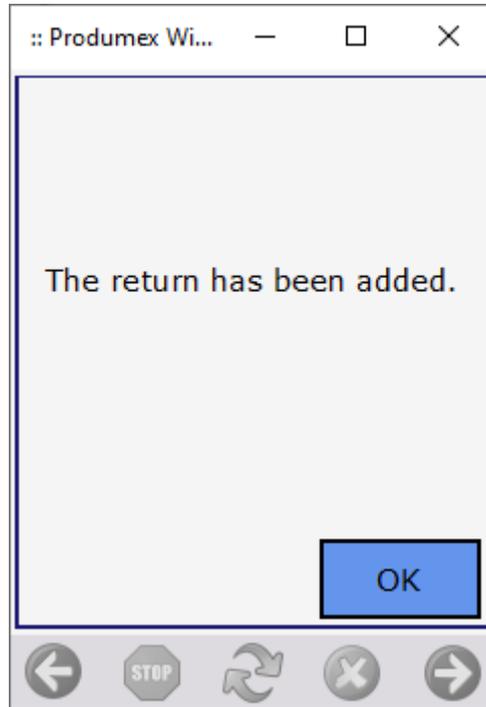
10. Returned item is added

The returned items are added to the selected location. Tap OK and the system goes back to the Select a customer screen.

A Sales Return document is created in SAP Business One.

- If the return has been created based on a Delivery, the corresponding lines of the Delivery document are closed.
- If the return has been created based on a Return Request, the corresponding lines of the Return Request document are closed.

If a new SSCC has been created, the *Warehouse: a new LU has been created (700)* print event is triggered after the return had been added.