



Returns Management

OneOffice Returns Management is a configurable workflow system for managing the processing of returned goods through the implementation of a structured process. Effective management of returns reduces costs, enhances customer service and provides full end-to-end visibility of the process.

Key Features at a Glance

- Workflow driven returns
- Clear visibility of status
- Easy to configure
- Customer Complaint analysis
- Supplier Performance analysis
- Integrates with web-based customer portal
- Quotation and tracking of repairs
- Fraudulent claim detection

Benefits

- Optimise use of assets
- Reduce cost of returns handling
- Faster turnaround of returns
- Enhanced customer satisfaction
- Use returns processing to gain competitive advantage

Introduction

Some proportion of the products customers order will be returned. A fast, efficient and customer friendly returns process can significantly contribute to improved inventory management, returns tracking and reduce overall costs.

Scenarios

OneOffice Returns Management provides best practise from a wide cross-section of businesses. It is easy for users to configure and re-configure the workflow to support individual scenarios, for example:

- **An online retailer** which offers a 'no quibble' exchange on every item. All

customers receive a replacement provided they hand the original item to the carrier delivering the replacement. Credit notes are rarely raised but the returned items may be sent back to their supplier if faulty (and a credit note requested) or put back into stock and optionally re-graded. Customers can review the status of a return via the e-commerce portal.

- **A manufacturing and service organisation** where most returns are for repair – free of charge if on a service contract or under warranty; on a time and materials basis if not. Occasionally items are scrapped if beyond economic repair; more often,

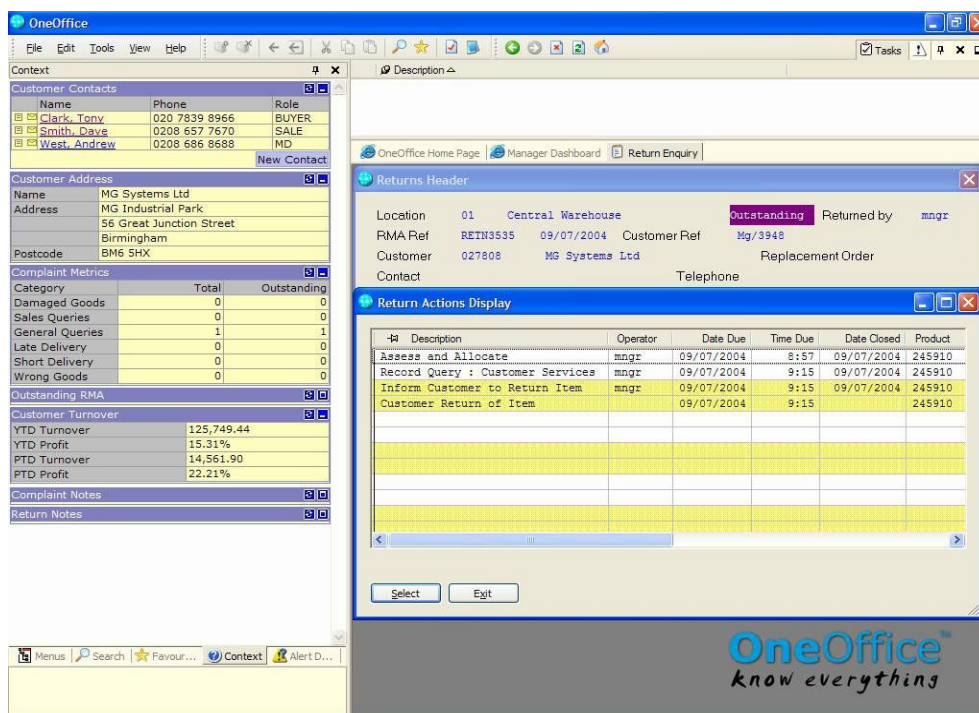


Figure 1. Using OneOffice Returns Management provides a clear, simple to customise structure for the handling and management of returns.



the return is found not to be necessary and instead a service call is logged.

- **A wholesale distributor** whose reseller customers return goods because they are not what was ordered, or are late, damaged, no longer needed or simply impossible to shift. Credits are raised in most cases (but only on receipt of a credit from the original supplier in the case of faulty goods). Occasionally customers try to return items they bought from another distributor; these cases need to be managed appropriately.

Returns Workflow

You can configure OneOffice Returns Management to handle these and many other scenarios by defining - for each return type that needs to be managed - a process flowchart which lays down the actions to be carried out and decisions to be made, who should carry them out, when and in what order, and what system activities are entailed. The required actions, decision choices and departmental structures are entirely user-definable.

As well as promoting greater operational efficiency, by recording the sequence of processes as they occur Returns Management enables your company to monitor, control and report on the progress of returns, both individual cases and in general.

Functional Scope

Strategix Returns Management handles the following returns-related functions:

- Product identification and validation (is this one of ours, is it under warranty etc?)
- Returns authorisation - this can be dependent on item value
- The issuing of RMA numbers - for individual or multiple items
- Printing of returns labels
- Recording reasons for return in terms of broad category and detailed issue, both from the customer perspective and 'internal view'
- Collection of returns - including choice of carrier and return location
- Exchanges - where a replacement is provided subject to return of the original
- Receipt of returns, with special handling of those cases where the quantity received does not match what was expected
- Product inspection
- Converting a potential return to the logging of a service call
- Returning an item to stock, optionally re-graded, re-valued and re-priced
- Returning an item to the original supplier, including raising a request for credit
- Repairs under service contract or warranty
- Quotations for repair and subsequent orders and invoices
- Returning items to the customer
- Scrapping of items
- Raising credit notes, with the option to vary the amount actually credited
- Adjusting sales analysis
- Supplier performance monitoring



Integration

Returns Management integrates closely with other OneOffice modules, ensuring:

- All necessary (and balancing) accounting entries are made automatically
- Multiple sales, stock, return and repair locations can be used
- That when Returns Management is used alongside the OneOffice Customer Portal, customers and field based users can view the status of returns over the internet using a web browser.

who should perform it and when, can be reviewed by management and reported to the customer as required.

Managers have the further option to view all current returns across departments and process stages.

Extensive enquiries and reports are provided including:

- Returns report (by Customer/by Product/by Reason Code)
- Outstanding Returns by Status
- Returns Statistics Analysis
- Returns Manifest Report
- Period Credit & Return to Stock Report
- Period Credit & Scrap Report

Management Facilities

At every stage, an item's current status and location, the next required action, and

The screenshot displays the OneOffice software interface. On the left is a 'Favourites' sidebar with folders for Customer Service, Marketing, Reports, Purchasing, Warehouse, Enquiries, Finance, and Service/Repairs. The main window shows a 'Supervisor Progression' window with a table of return items. The table has columns for Reference, Actdesc, Userid, Duedate, and Duetime. The data is as follows:

Reference	Actdesc	Userid	Duedate	Duetime
RETN3535	Customer Return of Item	mike	09/07/2004	9:15
COMP3545	Perform workshop test	paul	27/07/2004	8:30
RETN3481	Produce Customer Credit Note	mngr	30/07/2004	11:00
RETN3486	Quarantine and Inspect	mike	30/07/2004	11:00
RETN3492	Quarantine and Inspect	gary	30/07/2004	11:00
RETN3502	Produce Customer Credit Note	mike	30/07/2004	11:00
RETN3511	Despatch to Customer	paul	30/07/2004	11:00
RETN3519	Despatch to Customer	mark	30/07/2004	11:00
RETN3526	Perform workshop test	paul	30/07/2004	11:01
RETN3527	Produce Customer Credit Note	gary	30/07/2004	11:01
RETN3516	Regrade and Return to Stock	mngr	30/07/2004	11:02

At the bottom of the window are buttons for 'Select', 'Return', and 'Exit'. The OneOffice logo and tagline 'know everything' are visible in the bottom right corner of the interface.

Figure 2. Returns are easy to manage and track through every step of their life cycle. This ensures that returns can be resolved as quickly and effectively as possible.



Key Features and Benefits

- Highly configurable, workflow-driven returns processing
- Clear visibility of current status, next action and team/person responsible
- Faster turnaround, reduced administration costs and 'lost' items
- Enhanced customer satisfaction and retention
- Bulk or individual product handling
- Detection of fraudulent claims
- Supplier performance analysis, customer complaint analysis and 'internal' analysis
- Warranty visibility and price verification
- Management overview of processes and trends
- Automatic generation of required accounting entries, stock updates, sales analysis adjustments and documents

strategis

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