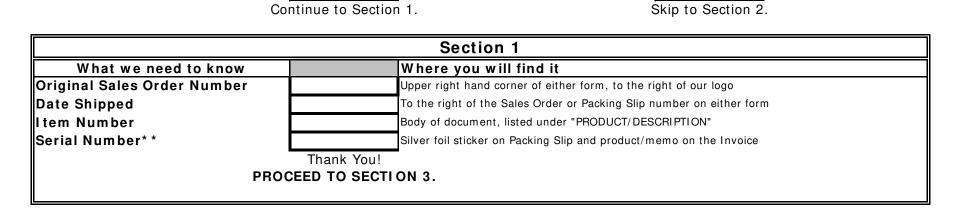## So you need a return number...

Most of the basic information needed to authorize a return can be found on the original order packing slip or the original customer invoice.  Do you have the original packing slip or invoice?

| YES |
|---|
| Continue to Section 1. |

| NO |
|---|
| Skip to Section 2. |

| Section 1 | | |
|---|---|---|
| **What we need to know** | | **Where you will find it** |
| **Original Sales Order Number** | | Upper right hand corner of either form, to the right of our logo |
| **Date Shipped** | | To the right of the Sales Order or Packing Slip number on either form |
| **Item Number** | | Body of document, listed under "PRODUCT/DESCRIPTION" |
| **Serial Number\*\*** | | Silver foil sticker on Packing Slip and product/memo on the Invoice |

Thank You!
**PROCEED TO SECTION 3.**

| Section 2 |
|---|

Let's see what else you can tell us about the order.  Minimum of two responses required.

**Who was the original purchaser?**

**What was the purchase order number?**

**What is the job name?**

**Approximately when did it ship?**   MM/DD/YY

**Who was the original consignee?**

Thank You!
**PROCEED TO SECTION 3.**

## Section 3

### More things we need to know

| Action Code | | Explanation: |
|---|---|---|
| **[C]**redit | | Apply credit to account.  No exchange or repair needed. |
| **[E]**xchange | | We send an exact replacement (must be a stocked item), with credit contingent on our inspection of the original. |
| **[R]**epair | | We repair the original and return it to you. |
| **Quantity to be returned** | | |
| **Purchase Order number*** | | |
| **How should it be shipped?*** | | |
| **Is it under warranty?** | **[Y]**es or **[N]**o | |

| | | Now about you: |
|---|---|---|
| **Your name** | | |
| **How may we contact you?** | Phone No.: | |
| | E-mail address | |
| **Your company*** | | |
| **Your address*** | | |
| **Your address** | | |
| **Your address** | | |
| **Your city, state and zip code*** | | |
| * Required if requesting an exchange or repair | | |

### What Customer Service needs to know

| | Comments: |
|---|---|
| Why are you sending it back? | |
| If defective, please describe the problem. | |
| Is it complete? | |
| Not returning complete item?  Please explain. | |
| Did you talk to anyone in technical support or one of our sales representatives about the problem? | |
| Was this helpful?  Why or why not? | |

Thanks again.

**SUBMIT**

# So the customer wants a return number...

| Terms in Avante RMT Module | Translation [aka what does that mean in English?] |
|---|---|
| **Bill to Customer** | the customer who <u>originally purchased</u> the material {must match invoice} |
| **Service Contact** | the person calling to request the RMA |
| **Telephone** | phone number for the person calling to request the RMA |
| **Original Sales Order** | the number of the original sales order on which the material was purchased |
| **(Replacement) Purchase Order** | the same PO as the original transaction (recommended), except for Depot Repairs |
| **Ship to Customer** | the original consignee, but **may be different, if**: |
| | (a) a **3rd party** is in possession of the material and is returning it |
| | (b) you need to send an **exchange** to a different location than the original order |
| | (c) you need to send the **repair** to a different location than the original |
| **Item Number** | the part number(s) of the item(s) the customer wants to return |
| **Authorized Quantity** | the quantity of the items we are receiving back from the customer |
| **Serial Number**\*\* | \*\*Optional.  I3-2000 returns require the serial number |
| **Billing Action Code** | **Exchange**--(a) if it is a stock item, and (b) you are sending them a new one in advance and (c) you will send the new one at no charge |
| | **Return for Credit**--neither an exchange nor a repair |
| | **Depot Repair**--we will repair the original and send it back |
| **Comments** | the nature of the situation--why are they sending it back |
| | What defect are we looking for when the item comes back? |
| | any special conditions or agreements concerning the credit amount |
| | expediting or special handling required |
| | full or partial warranty in effect |
| **Handy things to ask** | Is it complete? Are they returning ALL of the original components?  Explain. |
| | Did they talk to anyone in technical support or their sales rep |

## Things to know to create RMT

| | |
|---|---|
| **Price List** | be sure to select the same price list as the original transaction |
| **Comments** | any special conditions or agreements with the customer about credit amount |
| **Original Invoice** | requested by Accounting to reference on the credit memo |
| **Freight** | who pays it |

*fmiller*