RETURNS AND WARRANTY

How to handle a repair or replacement

A customer brings something back. Here's the path from the original sales order to a fulfilled repair — six steps, with two places where you pick the option that fits.

START

The original sales order

Everything starts from the order the customer bought the item on.

THE TRIGGER

The item needs to be repaired or replaced

1 Choose the sales order to work from

Either option works — pick whichever keeps your records the way you like them.

Find the original sales order

Keeps the repair attached to the original purchase.

OR

Create a new sales order

Keeps the repair as its own separate paper trail.

2 Add the item to the Return list

This is what tells inFlow the item is coming back from the customer.

3 Decide what happens to the returned item

Are you fixing this one, or sending out a different one?

REPAIRING IT

Restock the item

Restock it to a specific location if you want repairs kept apart from sellable stock.

OR

REPLACING IT

Discard the item

The old unit leaves your stock for good.

4 Add a line for the item going back to the customer

The repaired unit or its replacement — this is the item that ships out.

5 Add any service fees

Anything the customer is being charged for on top of the item.

Repair fee | Shipping | Parts | Labour

6

DONE

Fulfill the order

The item goes back out, the fees are invoiced, and your stock reflects what actually happened.

inFlow