

Complaints & Returns User Guide

Definition:

Complaints from customer as explained in presentation are handled in system based on the various scenarios.

Here let's see how standard cycles for various scenarios are run in system in this guide.

We will see one complete cycle and then move on to others

1. Subsequent Delivery Free of Charge

In this scenario customer had ordered for 2 PC of item however there was a complaint logged that only one was physically received, hence the remaining one is being sent free of charge.

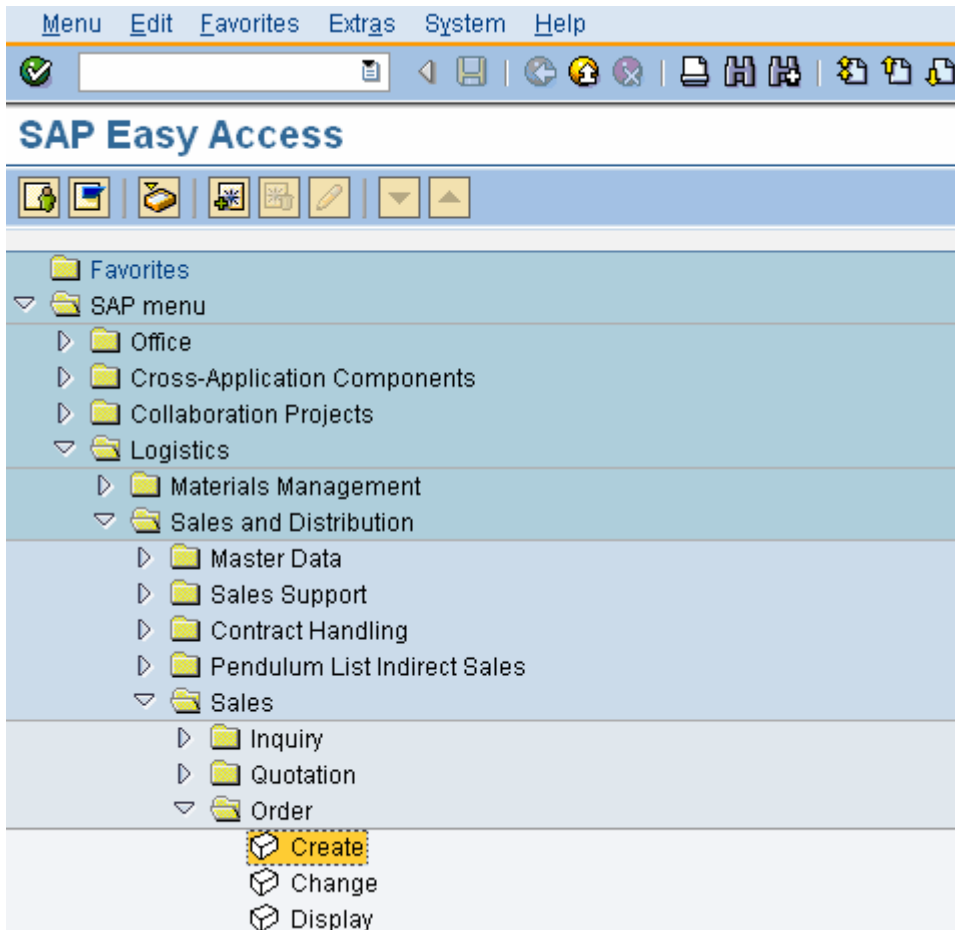
Prerequisite:

Following master data is required

1. Customer master data.
2. Material master data.
3. Pricing condition records.
4. Existing sales order to be used as reference.

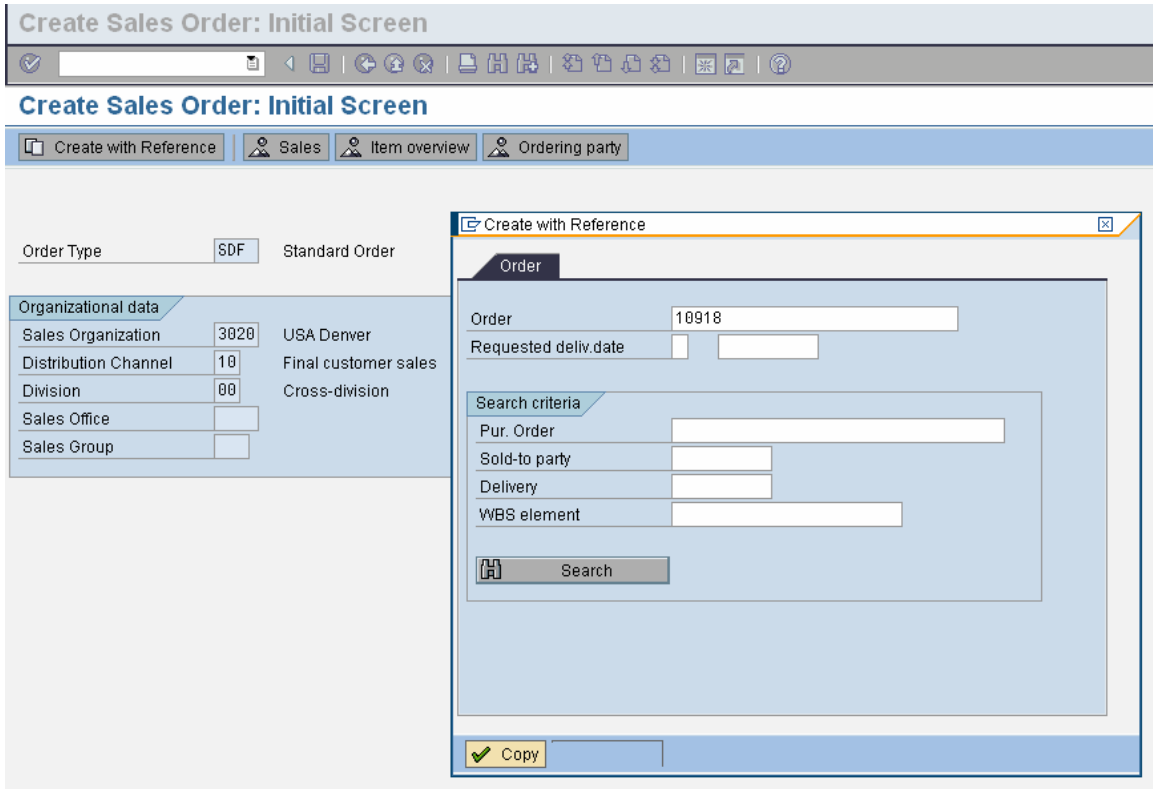
Menu Path:

Logistics → Sales and Distribution → Sales → Order → VA01 -Create



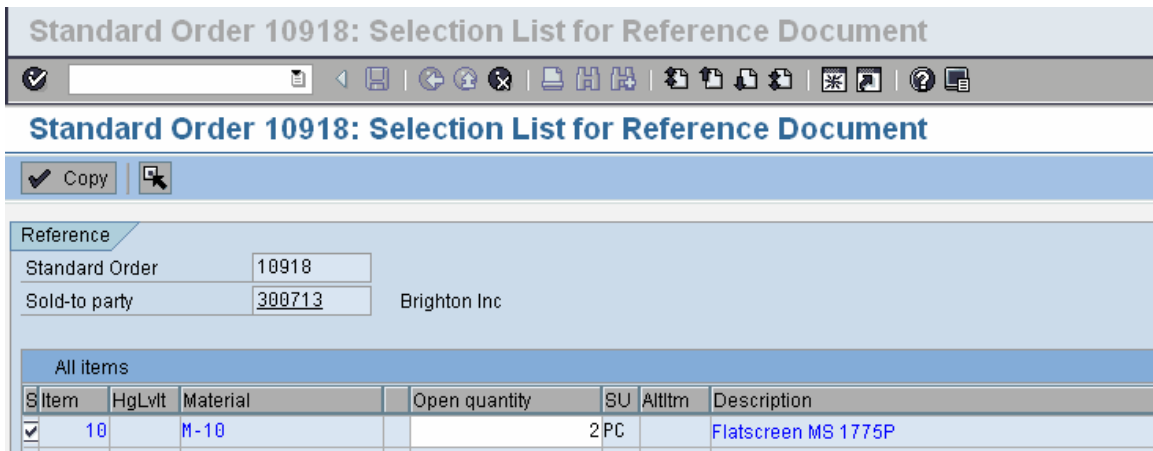
Double click 'VA01 - Create'

Enter Order type, Sales Organization, Distribution Channel & Division and click on



Sales order no 10918 was created earlier, this is used as reference

Click on **Selection list**



Change quantity to '1' and click on **Copy**

Create Subs.Div.Free of Ch.: Overview

SAP

Create Subs.Div.Free of Ch.: Overview

Subs.Div.Free of Ch. Net value USD

Sold-to party Brighton Inc / 225 SYCAMORE ROAD / VESTAL NY 13850

Ship-to party Brighton Inc / 225 SYCAMORE ROAD / VESTAL NY 13850

PO Number PO date

Sales Item overview Item detail Ordering party Procurement Shipping Configuration Reason for rejection

Req. deliv.date Deliver.Plant

Complete div. Total Weight K6

Delivery block Volume

Billing block Pricing date

Payment terms Incoterms

Order reason

Sales area USA Denver, Final customer sales, Cross-division

All items

| Item | Material | Order quantity | SU | Description | S | Customer Material Numb | ItCa | DG... | HgLvlt | First date | Plnt | Batch |
|------|----------|----------------|------|---------------------|-------------------------------------|------------------------|------|-------|--------|--------------|------|-------|
| | 10 M-10 | | 1 PC | Flatscreen MS 1775P | <input checked="" type="checkbox"/> | | KLN | | | D 21.12.2006 | 3200 | |
| | | | | | <input type="checkbox"/> | | | | | D 21.12.2006 | | |
| | | | | | <input type="checkbox"/> | | | | | D 21.12.2006 | | |
| | | | | | <input type="checkbox"/> | | | | | D 21.12.2006 | | |
| | | | | | <input type="checkbox"/> | | | | | D 21.12.2006 | | |

Data is copied on from Sales order, Enter the appropriate order reason

Select item and click on Conditions icon

Create Subs.Div.Free of Ch.: Item Data

Create Subs.Div.Free of Ch.: Item Data

Sales Document Item Item category Free of Charge Item

Material Flatscreen MS 1775P

Sales A Sales B Shipping Billing Document Conditions Account assignment Schedule lines Partners Texts Order Da

Qty PC Net USD

Tax

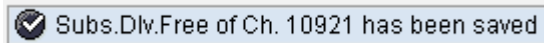
| CnTy | Name | Amount | Crcy | per | U... | Condition value | Curr. | Num... | OUn | CCon... | Un | Condition value | CdC. |
|------|--------------------------|--------|------|-----|------|-----------------|-------|--------|-----|---------|----|-----------------|------|
| | Gross | 0.00 | USD | 1 | PC | 0.00 | USD | 0 | PC | 0 | PC | 0.00 | |
| | Rebate Basis | 0.00 | USD | 1 | PC | 0.00 | USD | 0 | PC | 0 | PC | 0.00 | |
| | Net Value for Item | 0.00 | USD | 1 | PC | 0.00 | USD | 0 | PC | 0 | PC | 0.00 | |
| | Net value 2 | 0.00 | USD | 1 | PC | 0.00 | USD | 0 | PC | 0 | PC | 0.00 | |
| | Total | 0.00 | USD | 1 | PC | 0.00 | USD | 0 | PC | 0 | PC | 0.00 | |
| | Total | 0.00 | USD | 1 | PC | 0.00 | USD | 0 | PC | 0 | PC | 0.00 | |
| | VPRS Cost | 382.50 | USD | 1 | PC | 382.50 | USD | 1 | PC | 1 | PC | 0.00 | |
| | EDI1 Cust.expected price | | USD | 1 | PC | 0.00 | USD | 1 | PC | 1 | PC | 0.00 | |
| | EDI2 Cust.expected value | 0.00 | USD | | | 0.00 | USD | 0 | | 0 | | 0.00 | |

Price for item is not charged as pricing is not applicable for item category KLN.

Click on  to go back to overview screen.

Click on  to save order.

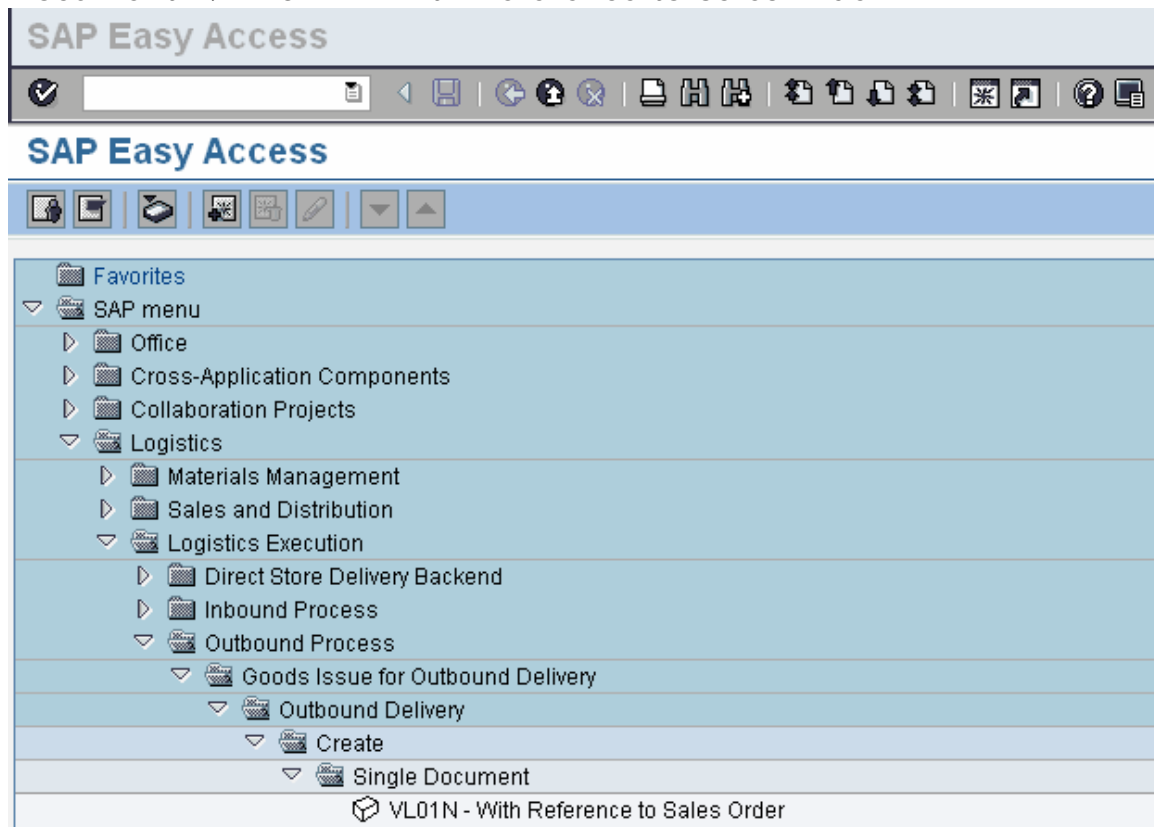
Following message is displayed.



Next step is Delivery for complaint item.

Menu Path:

Logistics → Sales and Distribution → Logistics Execution → Outbound Process → Goods Issue for Outbound delivery → Create → Single Document → VL01N – With Reference to Sales Rrder



Create Outbound Delivery with Order Reference

With Order Reference | W/o Order Reference | Post goods

Shipping point: Shipping Point Atlanta

Sales order data

Selection date:
 Order:
 From item:
 To item:

Predefine delivery type

Delivery Type:

Click 

Delivery Create: Overview

Outbound deliv.:
 Ship-to party: Brighton Inc / 225 SYCAMORE ROAD / VESTAL NY 13850

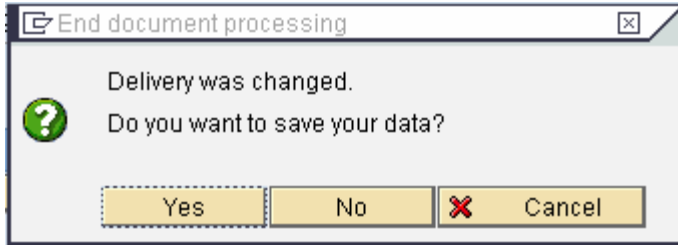
Document Date:

Item Overview | **Picking** | Loading | Transport | Status Overview | Goods Movement Data

Pick Date/Time: OvrllPickStatus: Not yet picked
 Warehouse No.: Lean warehouse Atla... OverallIVMStatus: WM Trnsf order reqd

| Item | Material | PInt | SLoc | Delivery quantity | SU | Pick quantity | SU | Batch | B... | Docu. Batc... | PV | Mat.av.dt. | Matl ... |
|------|----------|------|------|-------------------|----|---------------|----|-------|------|---------------|----|------------|----------|
| 10 | M-10 | 3200 | 0001 | 1 | PC | 0 | PC | | | | A | 21.12.2006 | 00:00... |

Click on Subsequent Functions → Create Transfer Order



Click on 'Yes'

Here delivery requires a transfer order, which will be confirmed, and then Post Goods Issue of delivery posted.

There is no Billing document generated in this case as complaint item is delivered on basis of delivery document.

2. Returns

In this scenario customer complains that goods sent were faulty and sends back the goods. A return order is created with reference to original billing document and investigated. Return delivery is created and goods are taken back in block stock.

A credit memo is created with reference to Return order and customer is credited.

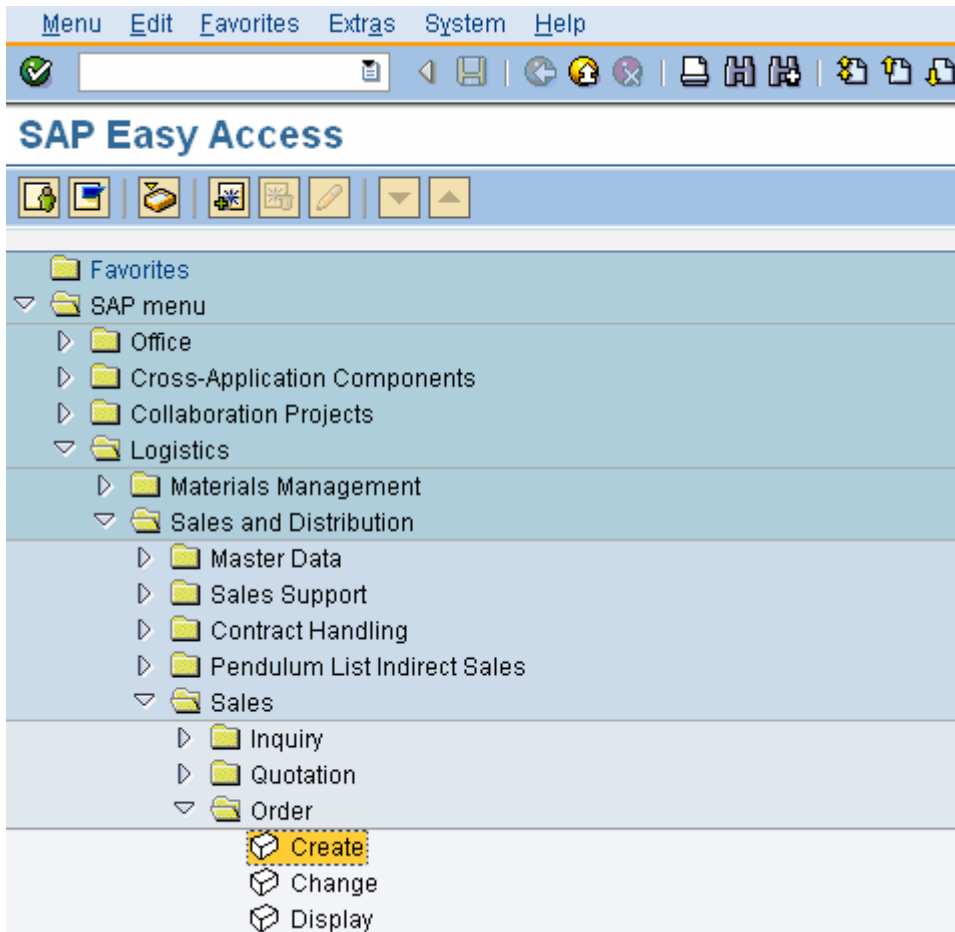
Prerequisite:

Following master data is required


1. Customer master data.
2. Material master data.
3. Pricing condition records.
4. Existing billing document to be used as reference.

Menu Path:

Logistics → Sales and Distribution → Sales → Order → VA01 -Create



Double click 'VA01 - Create'

Enter Order type 'RE" and click on  Create with Reference

Create Sales Order: Initial Screen

Order Type: RE

Organizational data

- Sales Organization
- Distribution Channel
- Division
- Sales Office
- Sales Group

Create with Reference

BillIDoc

Billing Document: 90035185

Copy Selection list

Click on **Selection list**

Create with Reference

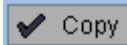
Copy Position

Ref. Invoice: 90035185

All items

| Item | Description | Open quantity | Billing date | Billed quantity |
|------|---------------------|---------------|--------------|-----------------|
| 10 | Flatscreen MS 1775P | 2 | 21.12.2006 | 2 |

Click on



Create Returns: Overview

Net value 1,334.00 USD

Sold-to party 300713 Brighton Inc / 225 SYCAMORE ROAD / VESTAL NY 13850

Ship-to party 300713 Brighton Inc / 225 SYCAMORE ROAD / VESTAL NY 13850

PO Number 90035185 PO date

Req. deliv. date D 21.12.2006

Complete div. Total Weight 41.00 KG

Delivery block Volume 0.000

Billing block 08 Check credit memo Pricing date 21.12.2006

Payment terms ZB01 14 Days 3%, 30/2... Incoterms FOB From the Plant


Order reason 102 Damaged in transit

Sales area 3020 / 10 / 00 USA Denver, Final customer sales, Cross-division

| Item | Material | Order quantity | SU | Description | S | Customer Material Numb | ItCa | DG... | HgLvIt | First date |
|------|----------|----------------|-----|---------------------|--------------------------|------------------------|------|-------|--------|-------------|
| | 10M-10 | | 2PC | Flatscreen MS 1775P | <input type="checkbox"/> | | REN | | | 021.12.2006 |
| | | | | | <input type="checkbox"/> | | | | | 021.12.2006 |
| | | | | | <input type="checkbox"/> | | | | | 021.12.2006 |
| | | | | | <input type="checkbox"/> | | | | | 021.12.2006 |
| | | | | | <input type="checkbox"/> | | | | | 021.12.2006 |

Enter the PO number for reference and Order reason

Click on  to save the return order.

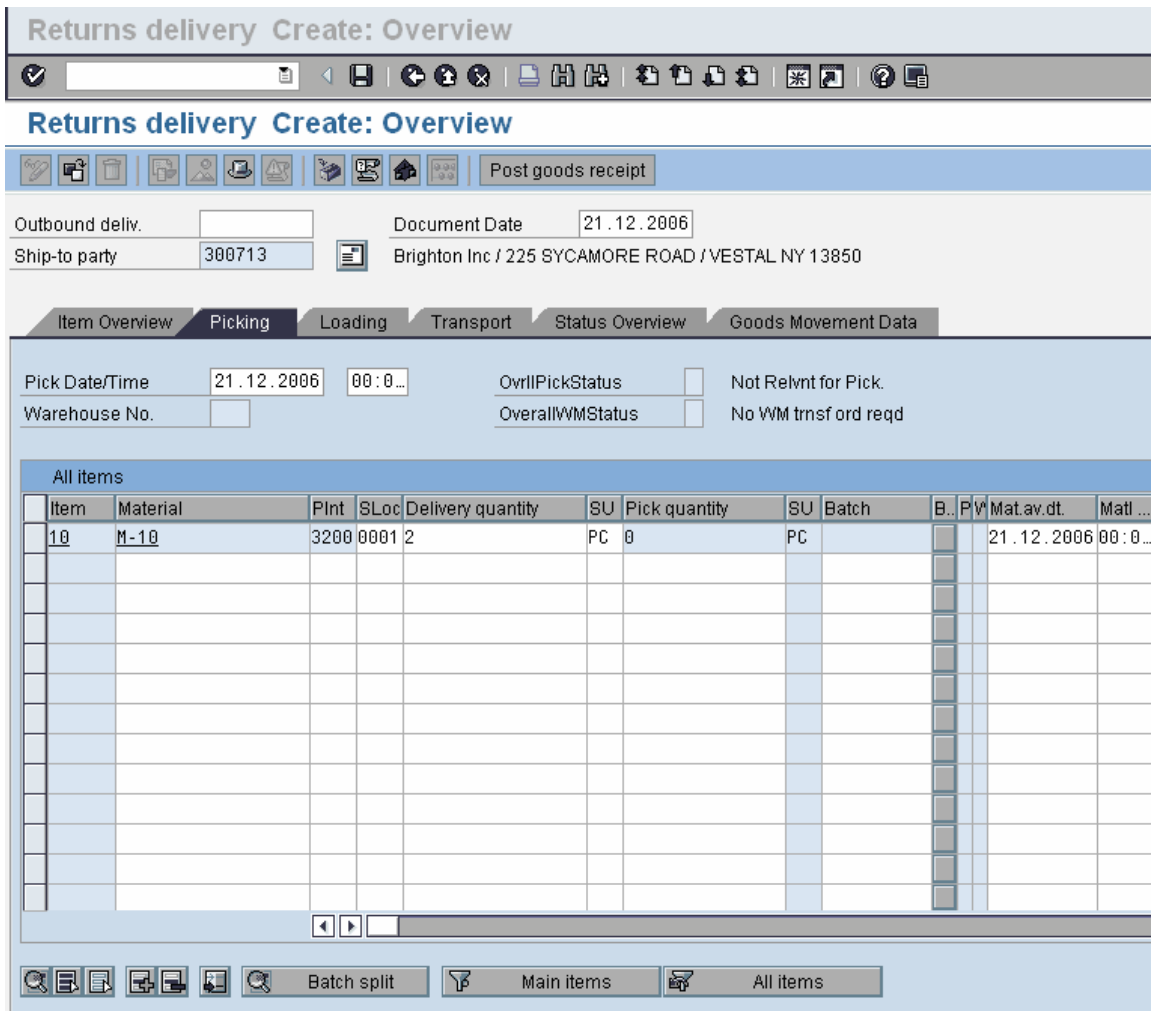
 Returns 60000091 has been saved

Next Step is to create the return delivery to take material in stock

Menu Path:

Logistics → Sales and Distribution → Logistics Execution → Outbound Process → Goods Issue for Outbound delivery → Create → Single Document → VL01N – With Reference to Sales order

Click 



The screenshot shows the SAP 'Returns delivery Create: Overview' screen. At the top, there is a title bar and a toolbar. Below that, the main header area contains the following information:

- Outbound deliv.:
- Document Date: 21.12.2006
- Ship-to party: 300713
- Address: Brighton Inc / 225 SYCAMORE ROAD / VESTAL NY 13850

Below the header, there are several tabs: 'Item Overview', 'Picking', 'Loading', 'Transport', 'Status Overview', and 'Goods Movement Data'. The 'Picking' tab is currently selected.

Under the 'Picking' tab, there are several input fields and checkboxes:

- Pick Date/Time: 21.12.2006 00:00...
- Warehouse No.:
- OvrllPickStatus: Not Relvnt for Pick.
- OverallWMStatus: No WM trnsf ord reqd


The main area of the screen is a table titled 'All items'. The table has the following columns: Item, Material, Plnt, SLoc, Delivery quantity, SU, Pick quantity, SU, Batch, B., P, W, Mat.av.dt, and Matl... The first row of data is:

| Item | Material | Plnt | SLoc | Delivery quantity | SU | Pick quantity | SU | Batch | B. | P | W | Mat.av.dt | Matl... |
|------|----------|------|------|-------------------|----|---------------|----|-------|----|---|---|------------|----------|
| 10 | M-10 | 3200 | 0001 | 2 | PC | 0 | PC | | | | | 21.12.2006 | 00:00... |

At the bottom of the screen, there is a toolbar with several icons and buttons: 'Batch split', 'Main items', and 'All items'.

As seen above the material would be taken in Plant 3200, Storage Location 0001. Click on **Post goods receipt**

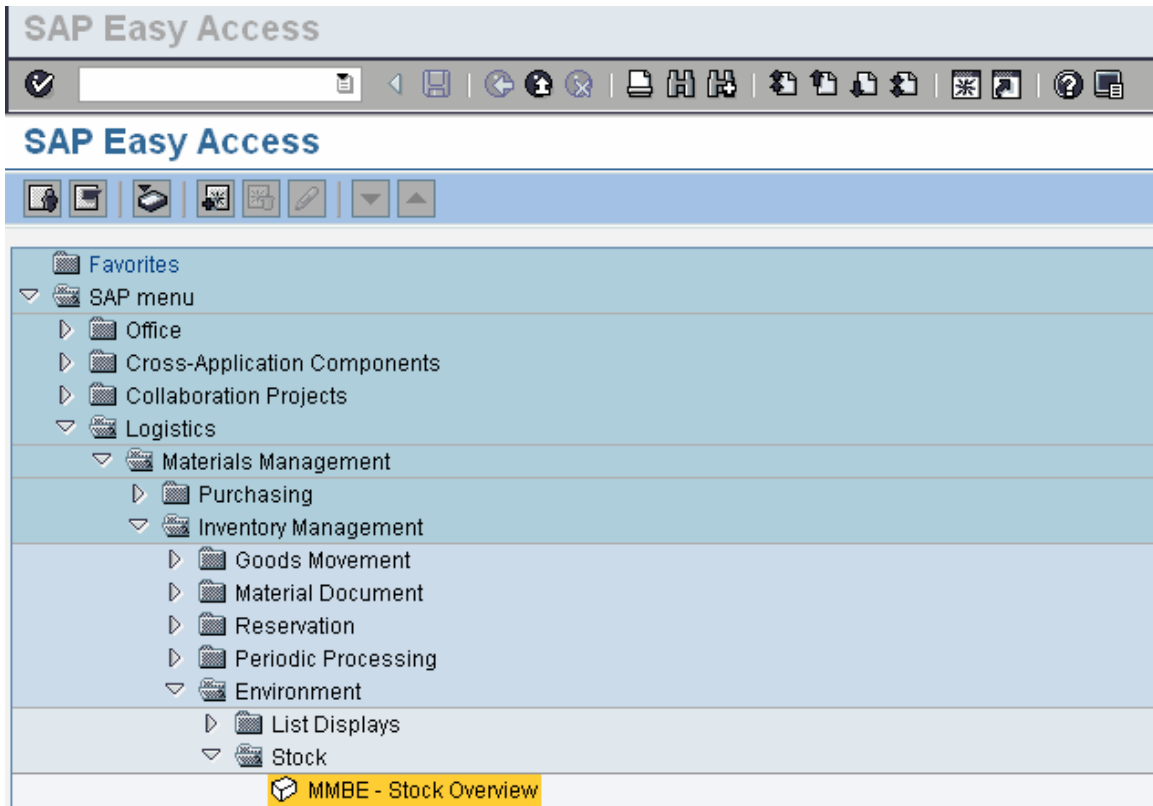
Delivery of type 'LR- Returns delivery' is saved.

 Returns delivery 84000033 has been saved

The stock can be checked as follows:

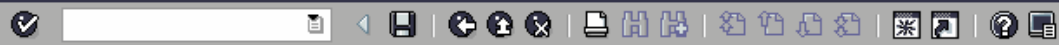
Menu Path:

Logistics → Materials Management → Inventory Management → Environment → Stock → MMBE – Stock Overview.



Double click 'MMBE – Stock Overview'

Stock Overview: Company Code/Plant/Storage Location/Batch



Stock Overview: Company Code/Plant/Storage Location/Batch



Database selections

| | | | | |
|------------------|------|----|--|--|
| Material | M-10 | | | |
| Plant | 3200 | to | | |
| Storage location | 0001 | to | | |
| Batch | | to | | |

Stock Type Selection

- Also Select Special Stocks
- Also Select Stock Commitments

List Display

| | | | | |
|-------------------------|---|----|--|--|
| Special Stock Indicator | | to | | |
| Display Version | 1 | | | |
| Display Unit of Measure | | | | |

- No Zero Stock Lines
- Decimal Place as per Unit

Selection of Display Levels

- Company Code
- Plant
- Storage Location
- Batch
- Special Stock

Click on

Stock Overview: Basic List

Selection

| | | |
|---------------|------|-----------------------|
| Material | M-10 | Flatscreen MS 1775P |
| Matl Type | HAWA | Trading goods |
| Unit of Meas. | PC | Base Unit of Meas. PC |

Stock Overview

Detailed Display

| Client/Company Code/Plant/Storage Location/Batch/Special Stock | Transfer (SLoc) | GR blocked stock | Schd.for delivery | Returns |
|--|-----------------|------------------|-------------------|---------|
| ▼ Total | | | 68.000 | 2.000 |
| ▼ 3000 IDES US INC | | | 68.000 | 2.000 |
| ▼ 3200 Atlanta | | | 68.000 | 2.000 |
| 0001 Warehouse 0001 | | | 68.000 | 2.000 |

The display shows returns quantity of 2 PC. The following options exist for material

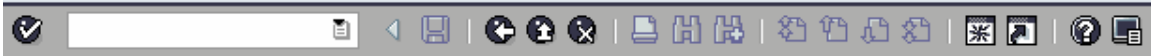
1. If Stock is inspected and found ok, it is taken back in 'Unrestricted Use' via material movement in transaction MB1B.
2. If Stock is inspected and found damaged it can be scrapped or kept in Blocked stock for scrapping later.

Next step is to Issue Credit memo to Customer.

Menu Path:

Logistics → Sales and Distribution → Sales → Order → VA02 - Change

Change Sales Order: Initial Screen



Change Sales Order: Initial Screen



Order

Search Criteria


Purchase Order No.


Sold-to party

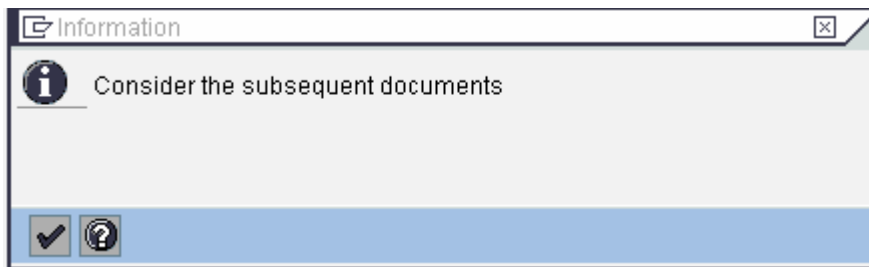
Delivery


Billing Document

WBS Element

 Search

Enter Return Order number and Click 



Click on 

Change Returns 60000091: Overview

Change Returns 60000091: Overview

Orders

Returns 60000091 Net value 1,334.00 USD

Sold-to party 300713 Brighton Inc / 225 SYCAMORE ROAD / VESTAL NY 13850

Ship-to party 300713 Brighton Inc / 225 SYCAMORE ROAD / VESTAL NY 13850

PO Number 90035185 PO date

Sales Item overview Item detail Ordering party Procurement Shipping Configuration Reason for rejection

Req. deliv.date D 21.12.2006

Complete delv. Total Weight 41.00 KG

Delivery block Volume 0.000

Billing block 08 Check credit memo Pricing date 21.12.2006


Payment terms ZB01 14 Days 3%, 30/2... Incoterms FOB From the Plant

Order reason 102 Damaged in transit

Sales area 3020 / 10 / 00 USA Denver, Final customer sales, Cross-division

All items

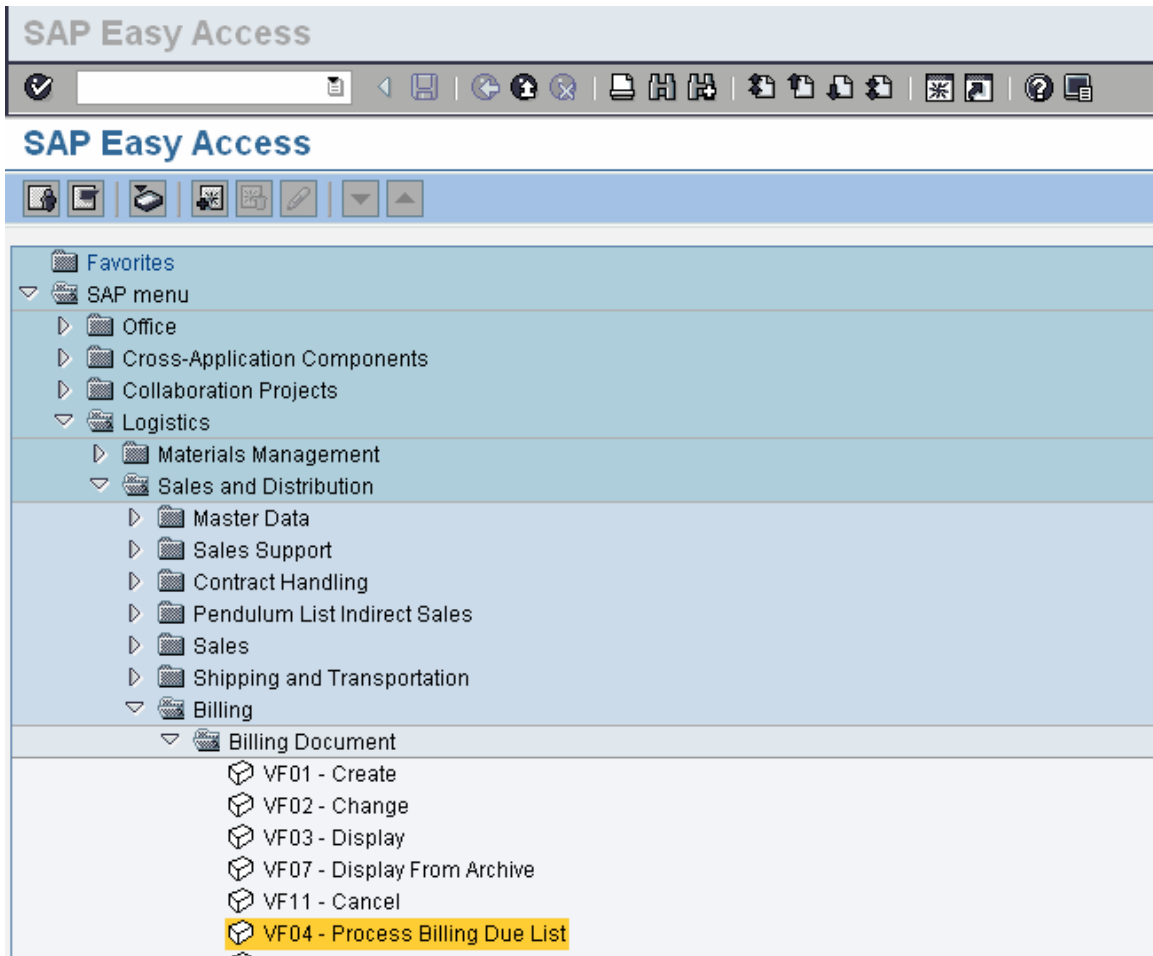
| Item | Material | Order quantity | SU | Description | S | Customer Material Numb | ItCa | DG... | HgLvt |
|------|----------|----------------|----|---------------------|--------------------------|------------------------|------|-------|-------|
| | 10M-10 | 2 | PC | Flatscreen MS 1775P | <input type="checkbox"/> | | REN | | 0 |

Remove the Billing block '08 – Check credit memo' and click on 

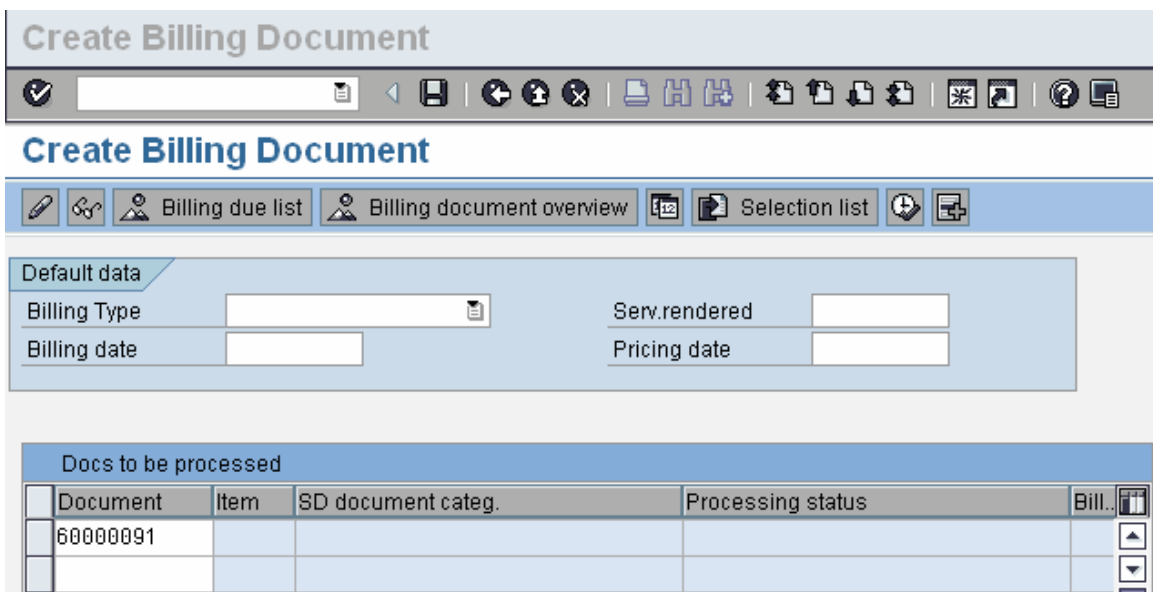
Next is creation of Credit Memo

Menu Path:

Logistics → Sales and Distribution → Billing → Billing Document → VF01 – Create



Double click 'VF01 – Create'



Display Billing Document

Display Billing Document

Billing items Accounting

Billing document 90035187

More Search Criteria

| | |
|-----------------|----------------------|
| Document Number | <input type="text"/> |
| Company Code | <input type="text"/> |
| Fiscal Year | <input type="text"/> |
| Reference | <input type="text"/> |

Search

Click on Accounting

List of Documents in Accounting

Documents in Accounting

| Object type text | Doc. Number |
|----------------------|-------------|
| Accounting document | 0100000009 |
| Profit center doc. | 0000270827 |
| Spec. purpose ledger | 1000269941 |
| Controlling Document | 0200062653 |
| Profitab. Analysis | 0100046769 |

Original document

Click on Accounting Document number '0100000009' and click on 

Document Overview - Display

Document Overview - Display

Doc.type : RV (Billing doc.transfer) Normal document

Doc. Number 100000009 Company code 3000 Fiscal year 2006
 Doc. date 21.12.2006 Posting date 21.12.2006 Period 12
 Ref.doc. 0090035185
 Doc.currency USD

| Itm | PK | CoCd | Account | Account short text | Amount in LC | LCurr | Amount | Crcy | LC2 amount | LCur2 | Cost Ctr |
|-----|----|------|---------|----------------------|--------------|-------|-----------|------|------------|-------|----------|
| 1 | 11 | 3000 | 300713 | Brighton Inc | 1,334.00- | USD | 1,334.00- | USD | | | |
| 2 | 40 | 3000 | 800000 | Sales revenues - dom | 1,334.00 | USD | 1,334.00 | USD | | | |
| * | | 3000 | | | | | 0.00 | USD | | | |
| ** | | | | | | | 0.00 | USD | | | |

Here as seen above Customer account is credited and Sales revenue is debited.

The cycle for Credit Memo request & Debit Memo request is similar to Returns minus the step for Return delivery creation.

The Standard order type used for Credit Memo request is 'CR' and for Debit Memo request is 'DR'.