



PROCESS REPAIR ORDERS

MFG

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step guide of how to **process repair orders** in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG covers the process for processing repair orders in NCFS.

Process Repair Orders

A repair order is created when a customer requires fixing or refurbishing of an item. Repair orders can be created in two ways:

- **Referenced Repair Order:** Initiate a repair directly from an existing shipped order. Select the relevant line(s) and use the return option. Specify the quantity, return type as “**Repair and Ship**”, and (optionally) a reason. The system references the original order and updates the order type accordingly. Item prices on the repair item line need to be adjusted manually to \$0.00.
- **Unreferenced Repair Order:** If no original order is available, create a new repair order by entering customer details and adding unreferenced return lines. Specify item, quantity, return type as “**Repair and Ship**”. Item prices on the Unreferenced Repair Order for the repair item line will be automatically adjusted to \$0.00.

When processing a repair order, select the “**Repair and Ship**”. NCFS has one repair line type option:

- **Repair and Ship:** Repair items will be received for refurbishing and will be shipped back to the customer once completed
 - Once submitted, **Order Line** status updates to “**Awaiting Receiving**”

Note: To bill the customer for repair work, add a separate line for the same item or service charge item with price adjustment.

References Repair Order

To process a referenced repair, follow these steps:

- 1. Within the **Order Lines** table, select the **desired item** to return.
- 2. Click the **Return** button.

Note: If repairing all items within the order, the **Return All** option can be selected from the **Return** button drop-down list.

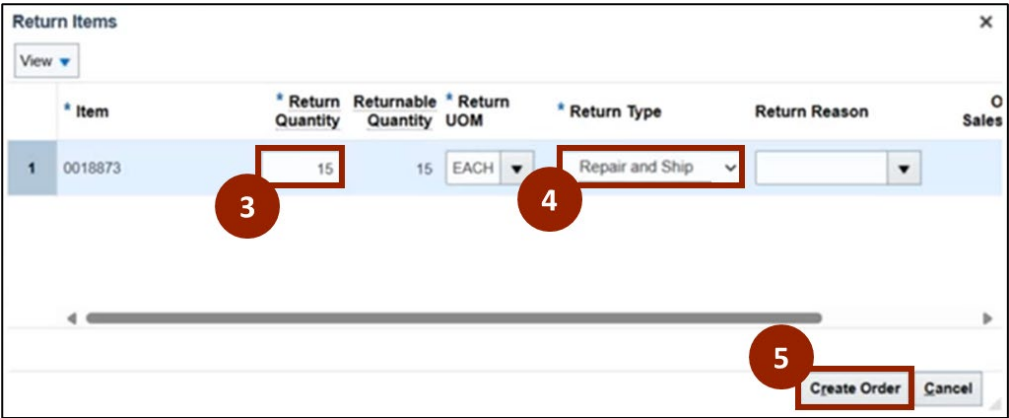


The **Return Items** pop-up window displays, all unlocked fields may be adjusted:

- 3. In the *Return Quantity* field, enter the **number of items** the customer needs repaired.
- 4. In the *Return Type* drop-down field, select **Repair and Ship**.

Note: The **Repair and Ship** option should only be selected when completing a repair order.

- 5. Click the **Create Order** button.



Note: The **Order** screen transitions to a **Create Order** screen and in the **Order Lines** section, each line item includes a link to the original order for easy reference.

Create Order: GOLDSTON FIRE DEPARTMENT ⓘ

Total: -350.00 Actions Save Submit Cancel

Currency = US Dollar

* Customer: GOLDSTON FIRE DEPARTMENT Business Unit: 5200 DEPARTMENT OF ADULT CORRECTION

Contact: 000004_AP Bill-to Customer: GOLDSTON FIRE DEPARTMENT

Contact Method: 000000 Bill-to Account: 117575

* Ordered Date: 8/8/25 10:13 AM Ship-to Customer: GOLDSTON FIRE DEPARTMENT

* Purchase Order: Ship-to Address: PO BOX 432, GOLDSTON NC, 27252, CHATHAM, US

* Order Type: Standard Sales Credits: Sales Agreement:

Order Lines ⓘ

Select Item: Add

Actions View Update Lines Freeze Detach

Item	Duration	Period	Sales Agreement	Sales Agreement Line	Sales Agreement Version	Quantity	UOM	On Hand	Your Price
0021269-AWARDS, CEDER CHEST 36X18X18 Original Order 162						1	EACH		Sale Price -350

Columns Hidden: 19

When processing a referenced repair order, item prices on the repair item line need to be adjusted manually to \$0.00.

To adjust the item prices, follow these steps:

6. Click the **Pencil** icon.

Create Order: GOLDSTON FIRE DEPARTMENT ⓘ

Total: -350.00 Actions Save Submit Cancel

Currency = US Dollar

* Customer: GOLDSTON FIRE DEPARTMENT Business Unit: 5200 DEPARTMENT OF ADULT CORRECTION

Contact: 000004_AP Bill-to Customer: GOLDSTON FIRE DEPARTMENT

Contact Method: 000000 Bill-to Account: 117575

* Ordered Date: 8/8/25 10:13 AM Ship-to Customer: GOLDSTON FIRE DEPARTMENT

* Purchase Order: Ship-to Address: PO BOX 432, GOLDSTON NC, 27252, CHATHAM, US

* Order Type: Standard Sales Credits: Sales Agreement:

Order Lines ⓘ

Select Item: Add

Actions View Update Lines Freeze Detach

Item	Duration	Period	Sales Agreement	Sales Agreement Line	Sales Agreement Version	Quantity	UOM	On Hand	Your Price
0021269-AWARDS, CEDER CHEST 36X18X18 Original Order 162						1	EACH		Sale Price -350

Callout: Your Price -350

7. In the **Price Adjustments Line** of the **Edit Sale Price** window, enter **information related to the adjustment** (e.g., Price override, 0, Other).

Note: Once these fields are populated the **Adjustments** table displays below the Price Adjustment line.

8. Click the **Save and Close** button.

Edit Sale Price: Line 1

Price Adjustments

	* Type	* Amount	* Basis	* Reason	Adjustment
1	Price override	0		Other	350

List Price -350
Automatic Adjustments 0
Manual Adjustments 350
Net Price 0

Save and Close **Cancel**

Note: Adjustments have been applied, and the price adjustment is reflected in the *Total* amount displayed at the top of the **Create Order** screen.

9. In the *Purchase Order* field, enter a **purchase order identifier**.

10. Click the **Save** button.

Create Order: GOLDSTON FIRE DEPARTMENT

Total: 0.00 Actions **Save** **Submit** **Cancel**

Currency = US Dollar

* Customer: GOLDSTON FIRE DEPARTMENT
Contact: 000004_AP
Contact Method: 000000
* Ordered Date: 8/8/25 10:13 AM
* Purchase Order
* Order Type: Standard

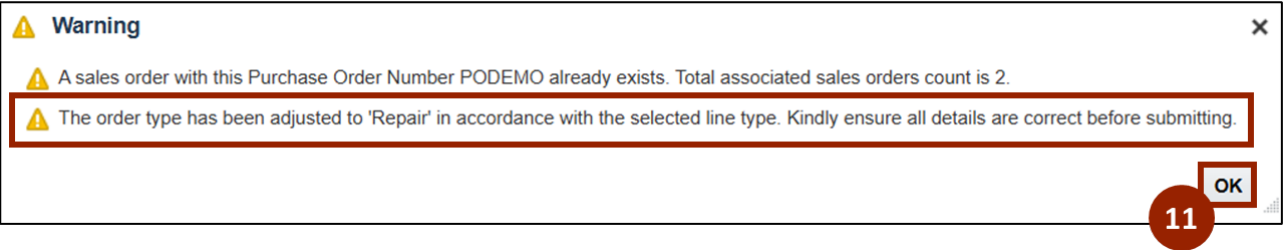
Business Unit: 5200 DEPARTMENT OF ADULT CORRECTION
Bill-to Customer: GOLDSTON FIRE DEPARTMENT
Bill-to Account: 117575
Ship-to Customer: GOLDSTON FIRE DEPARTMENT
Ship-to Address: PO BOX 432, GOLDSTONNC, 27252, CHATHAM, US
Sales Credits
Sales Agreement

Order Lines

Item	Duration	Period	Sales Agreement	Sales Agreement Line	Sales Agreement Version	Quantity	UOM	On Hand	Your Price
0021269- AWARDS, CEDER CHEST 36X18X18 Original Order 152						1	EACH		0

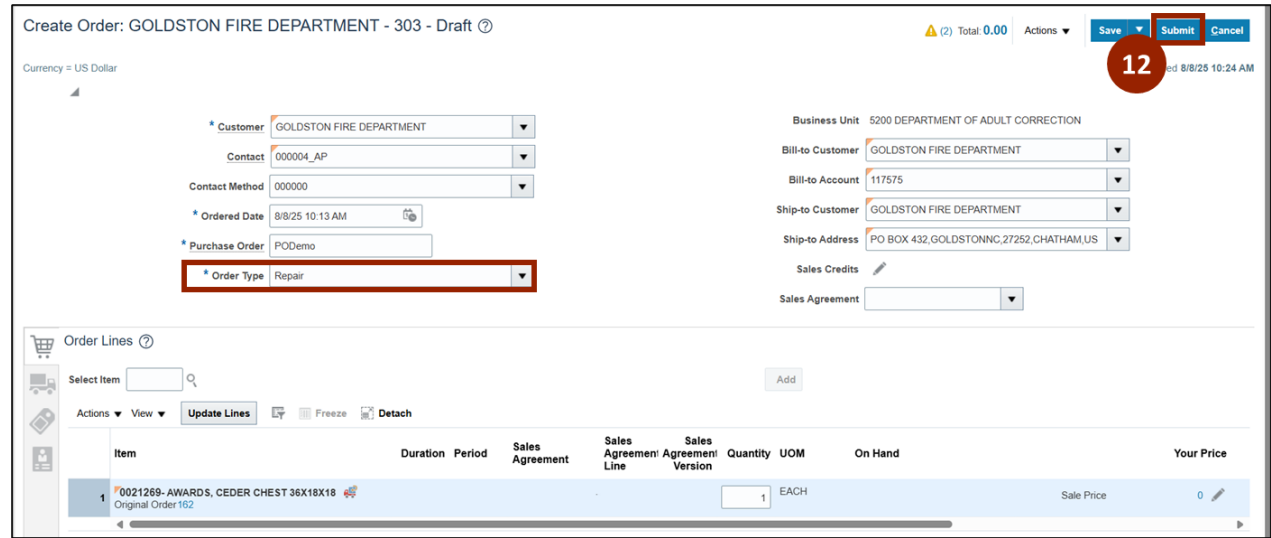
Note: A **Warning** pop-up window may appear with the message along with specific details related to the order selections. The notification states that the order type has been adjusted to **Repair** and to ensure all details are correct before submitting.

11. Click **OK**.

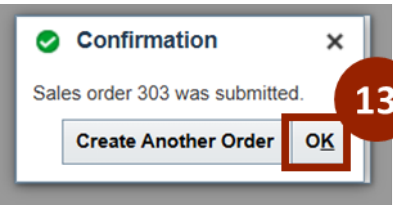


Note: NCFS automatically changes the *Order Type* field to the appropriate selection.

12. Once all information has been verified, click **Submit**.



13. On the **Confirmation** pop-up window, click **OK**.



Note: The *Create Order* screen transitions to an *Order* screen and a **Truck** icon displays, indicating that a return has been initiated and the status of the return is reflected in the **Status** column.

Order: GOLDSTON FIRE DEPARTMENT - 303 - Processing ⓘ

Total: 0.00 Actions Refresh Done

Currency = US Dollar

Customer: GOLDSTON FIRE DEPARTMENT (561611)
Contact: 000004_AP
Contact Method: 000000
Ordered Date: 8/9/25 10:13 AM
Purchase Order: PODemo
Order Type: Repair

Business Unit: 5200 DEPARTMENT OF ADULT CORRECTION
Bill-to Customer: GOLDSTON FIRE DEPARTMENT
Bill-to Account: 117575
Ship-to Customer: GOLDSTON FIRE DEPARTMENT
Ship-to Address: PO BOX 432, GOLDSTON NC, 27252, CHATHAM, US
Sales Credits
Sales Agreement

Order Lines ⓘ

Apply Hold Return Show All View Freeze Detach

	Item	Status	Duration	Period	Quantity	Sales Agreement	Sales Agreement Line	Sales Agreement Version	UOM	
1	0021269 - AWARDS, CEDER CHEST 36X18X18 Original Order 162	Not Started			1				EACH	Sale f

14. Click the **Refresh** button to update the *Order* screen.

Actions Refresh Done

14

Order Lines ⓘ

Apply Hold Return Show All View Freeze Detach

	Item	Status	Duration	Period	Quantity	Sales Agreement	Sales Agreement Line	Sales Agreement Version	UOM	
1	0021269 - AWARDS, CEDER CHEST 36X18X18 Original Order 162	Awaiting Receiving			1				EACH	Sale f

Rows Selected 1 Columns Hidden 15

Unreferenced Repair Order

To create an unreferenced repair order, from the *Create Order* screen, follow these steps:

1. Enter the appropriate information into the *Header Detail* fields such as **Customer** and **Purchase Order Number**.
2. In the *Order Type* field, select **Repair**.
3. Click the **Actions** button.

4. Select **Add Unreferenced Return Lines**.

Create Order: GOLDSTON FIRE DEPARTMENT ⓘ

Currency = US Dollar

1 * Customer GOLDSTON FIRE DEPARTMENT

Contact 000004_AP

Contact Method 000000

* Ordered Date 8/7/25 8:59 PM

* Purchase Order PODemo

* Order Type Repair

2

3 Order Lines ⓘ

Select Item ⓘ

4 Actions View Update Lines Freeze Detach

Release Holds

Add Unreferenced Return Lines

Quantity UOM On Hand

5. In the *Return Quantity* field, enter the **number of items** the customer needs to return.
6. In the *Return Type* drop-down field, select the **Repair and Ship** option.
7. Click the **Add** button.

Add Unreferenced Return Lines

Actions View Format + - Freeze Detach

* Item	* Covered Item	* Return Quantity	* UOM	* Return Type	Duration	Period	Cancellation Effective Date
0020771		1	EACH	Repair and Ship			

Columns Hidden 4

7 Add Cancel

8. Click the **Submit** button.

8 Save Submit Cancel

9. In the **Warning** pop-up window, click **OK**.

Warning

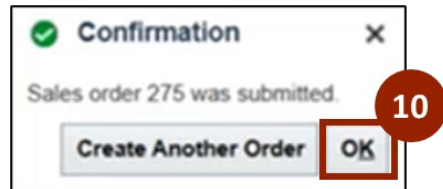
⚠ A sales order with this Purchase Order Number PODEMO already exists. Total associated sales orders count is 2.

⚠ The order type has been adjusted to 'Repair' in accordance with the selected line type. Kindly ensure all details are correct before submitting.

9 OK

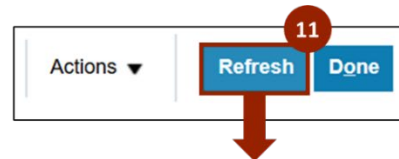
10. On the **Confirmation** pop-up window, click **OK**.

Note: The **Create Order** screen transitions to an **Order** screen and a **Truck** icon displays, indicating that a return has been initiated with no reference to the original order. Item prices on the Unreferenced Repair Order for the repair item line are automatically adjusted to \$0.00. To bill the customer for repair work, add a separate line manually of the same item or Service Charge item with price adjusted to reflect repair charge.



Order Lines									
Select Item Add									
Actions View Update Lines Freeze Detach									
Item	Quantity	UOM	On Hand	Line Type	Your Price	Amount	Duration		
1 0020771- DESK, ADJ HT, GRAPHITE TOP, L SHAPE, 72X72, BL BASE, RR Original Order: No reference	1	EACH		Repair and Ship	0	0.00			
2 0020771- DESK, ADJ HT, GRAPHITE TOP, L SHAPE, 72X72, BL BASE, RR	1	EACH	Out of Stock	Buy	2,000	2,000.00			

11. Click the **Refresh** button to update the **Order** screen.



Order Lines

Apply Hold

Return

Show

All

View

Freeze

Detach

		Status	Duration	Period
1	J. TRASH CAN HOLDER, ST FRAME, 2"X4" 100% RECY PLSTC SHELL, 37"H	Awaiting Receiving		

Rows Selected 1

Wrap-Up

NCFS users can **process repair orders** by following the steps outlined above.

Additional Resources

Instructor Led Training (ILT)

- MFG114 – Manages Sales Order 2