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**"

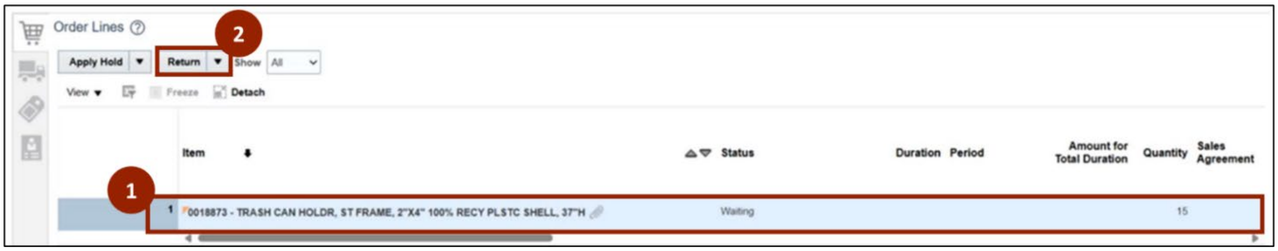
Note: To bill the customer for repair work, add a separate line for the same item or service charge item with price adjustment.

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.

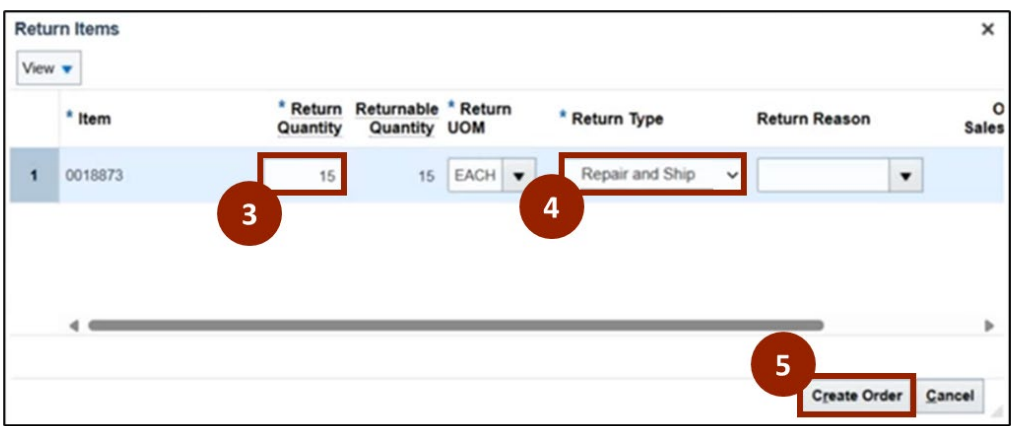


The ***Return Items*** pop-up window displays, all unlocked fields may be adjusted:

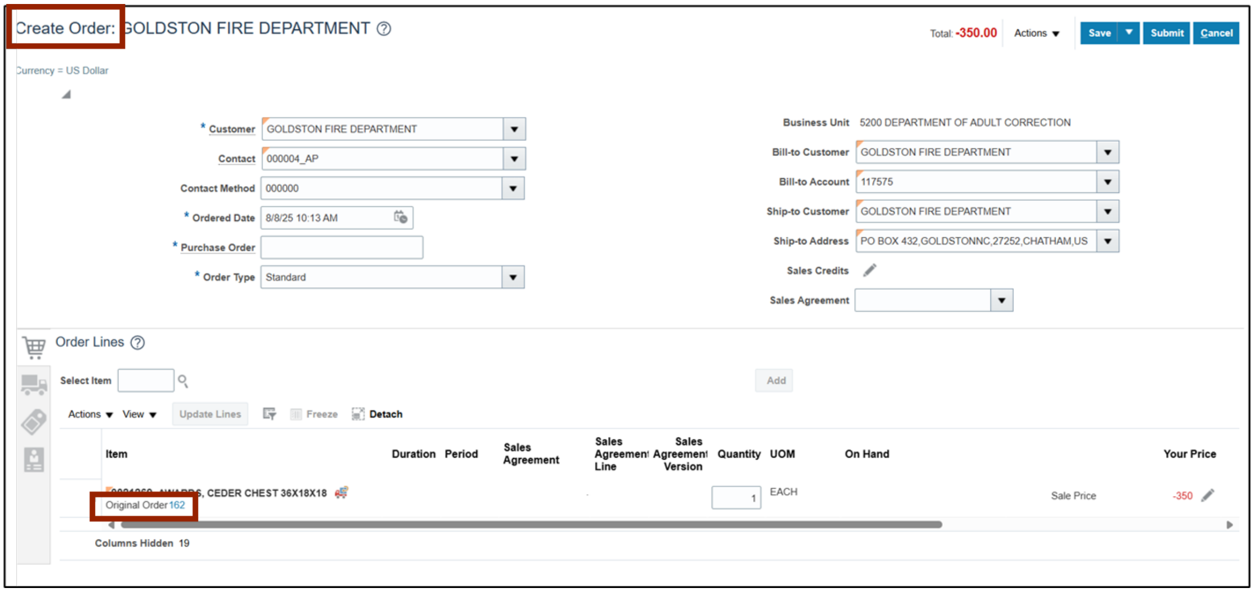
3. In the *Return Quantity* field, enter the **number of items** the customer needs repaired.
4. In the *Return Type* drop-down field, select **Repair and Ship.**

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

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



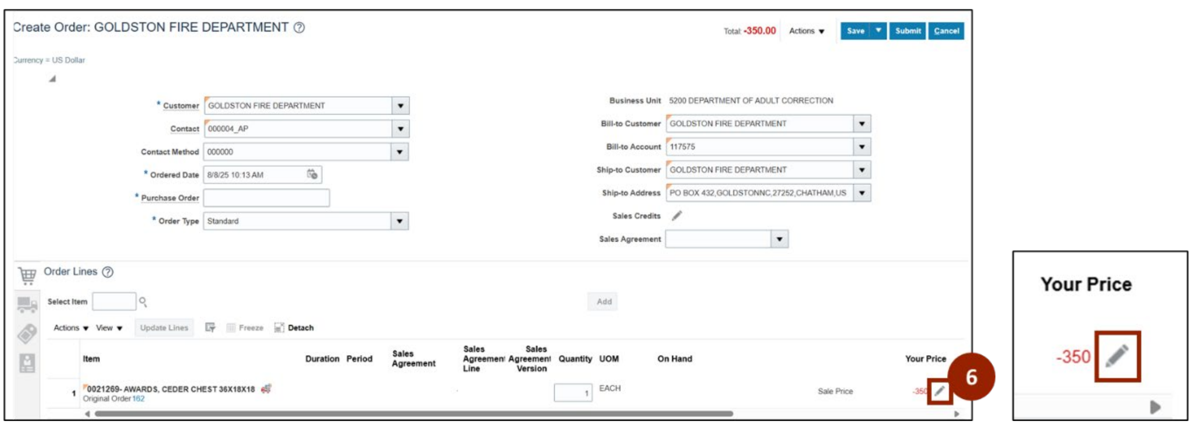
Note: The ***Order*** screen transitions to a ***Create Order*** screen and in the *Order Lines* section, each line item includes a link to the original order for easy reference.



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:

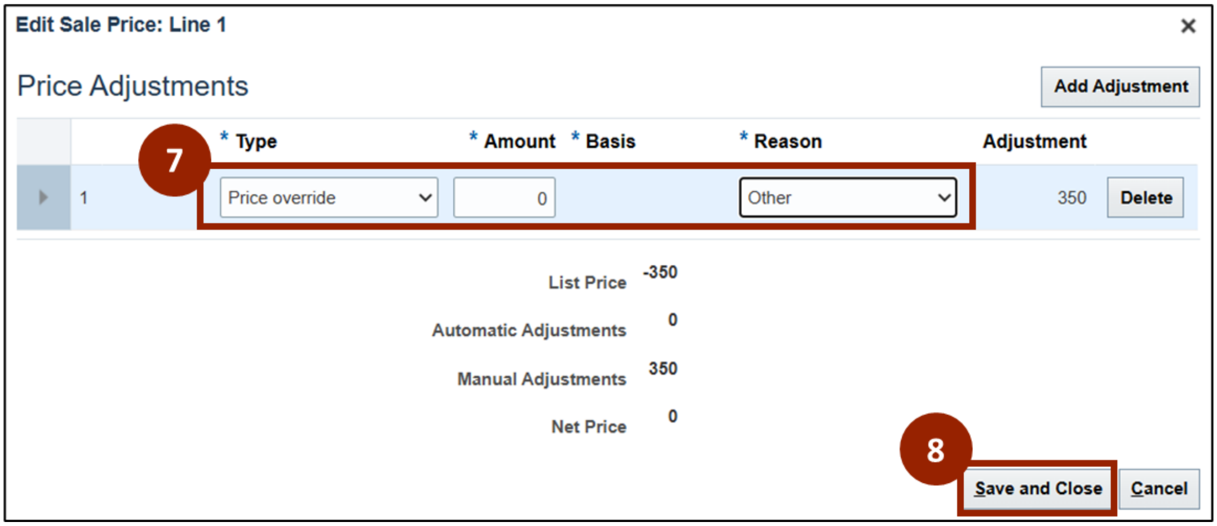
6. Click the **Pencil** icon.



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

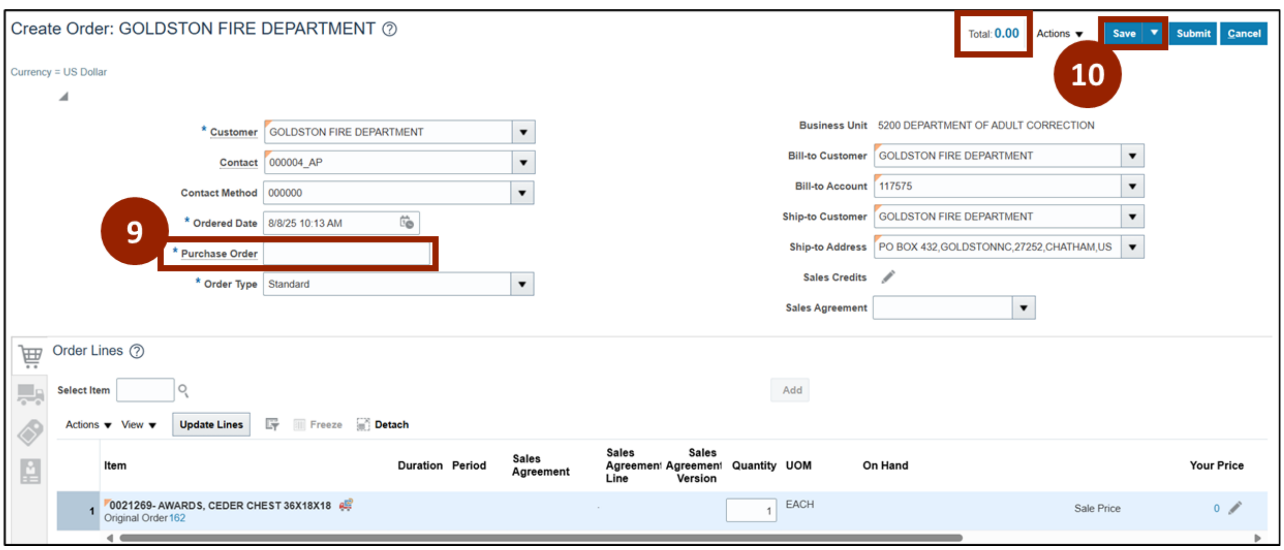
Note: Once these fields are populated the ***Adjustments*** table displays below the Price Adjustment line.

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



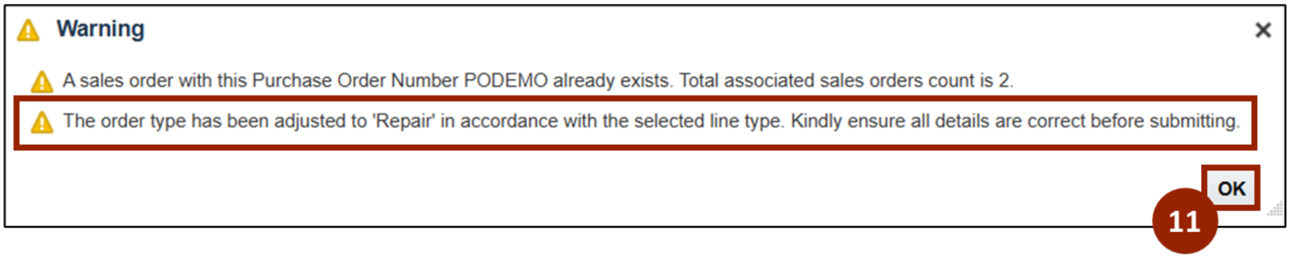
Note: Adjustments have been applied, and the price adjustment is reflected in the *Total* amount displayed at the top of the ***Create Order*** screen.

9. In the *Purchase Order* field, enter a **purchase order identifier.**
10. Click the **Save** button.



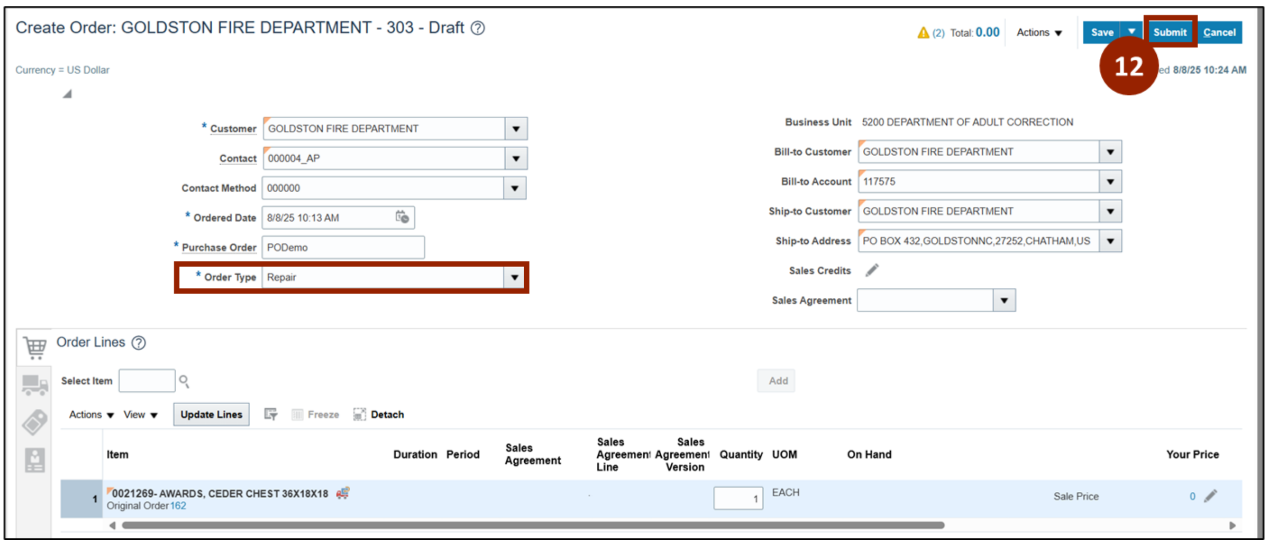
Note: A ***Warning*** pop-up window may appear with the message along with specific details related to the order selections. The notification states that the order type has been adjusted to '**Repair**' and to ensure all details are correct before submitting.

11. Click **OK.**

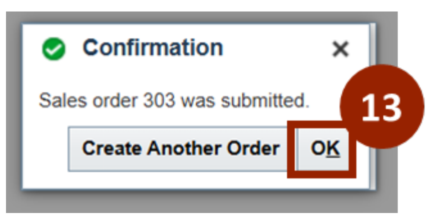


Note: NCFS automatically changes the *Order Type* field to the appropriate selection.

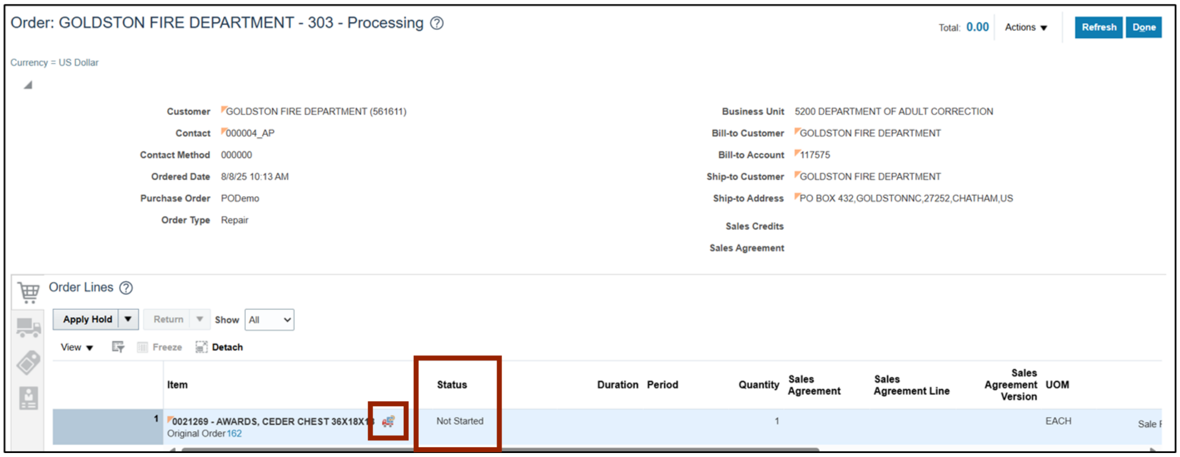
12. Once all information has been verified, click **Submit.**



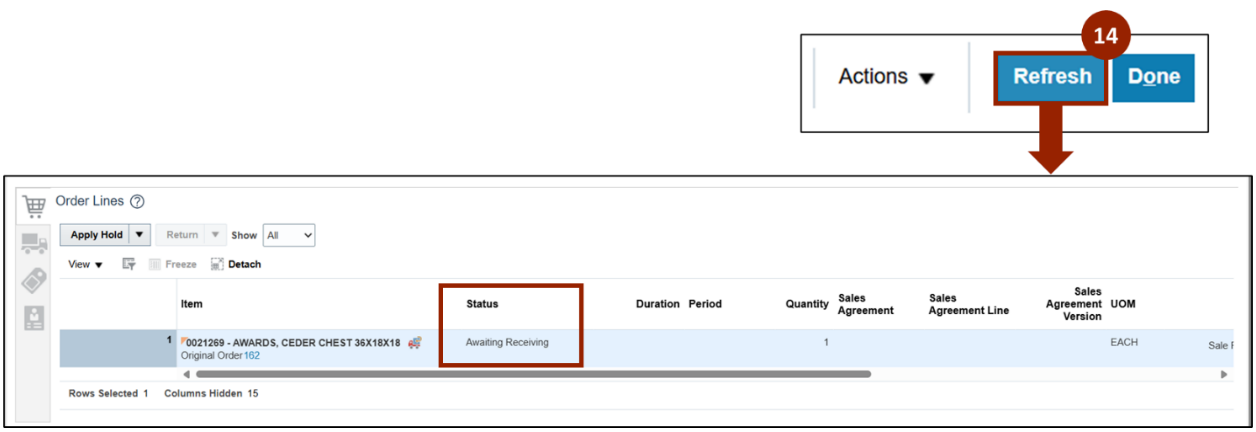
13. On the ***Confirmation*** pop-up window, click **OK.**



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.



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

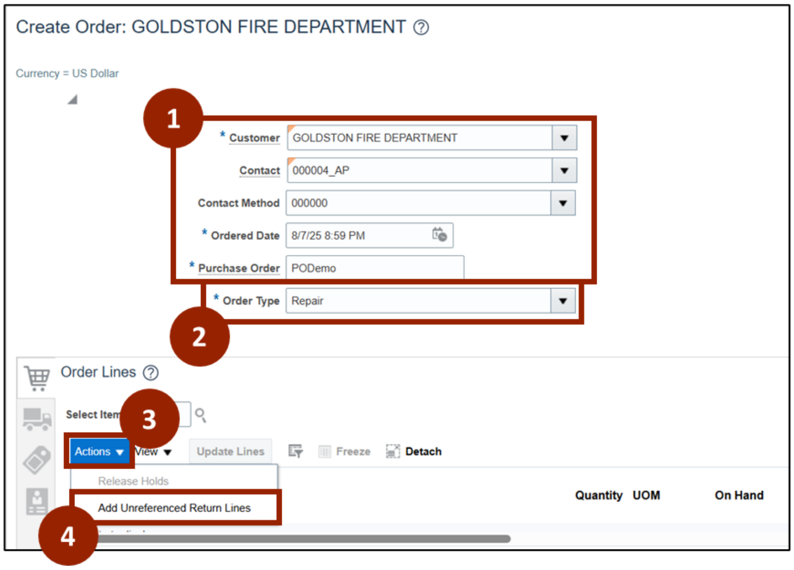


Unreferenced Repair Order

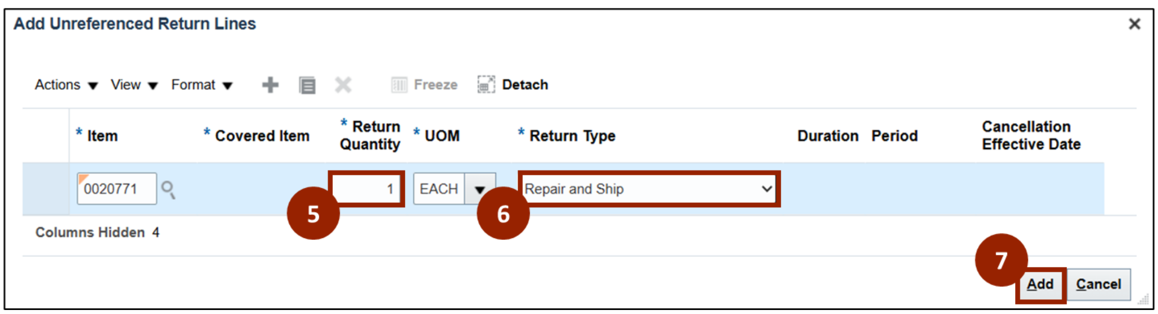
To create an unreferenced repair order, from the ***Create Order*** screen, follow these steps:

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.**

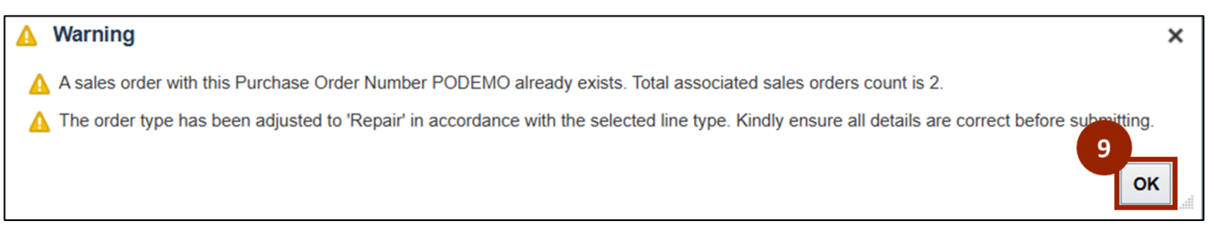


5. In the *Return Quantity* field, enter the **number of items** the customer needs to return.
6. In the *Return Type* drop-down field, select the **Repair and Ship** option.
7. Click the **Add** button.



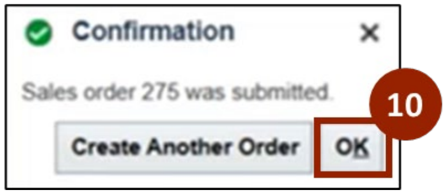
8. Click the **Submit** button.

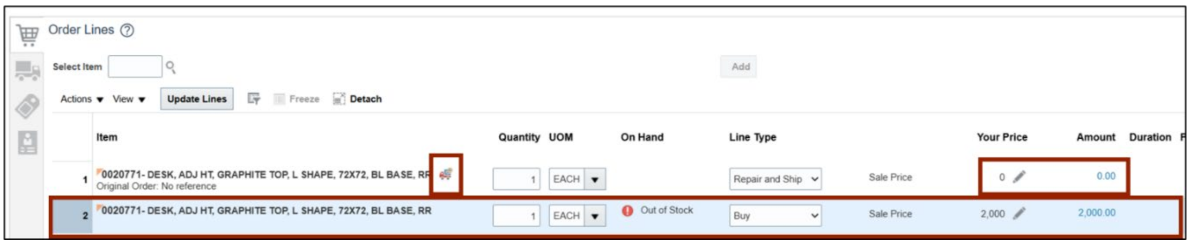
9. In the ***Warning*** pop-up window, click **OK.**



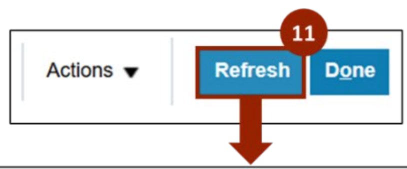
10. On the ***Confirmation*** pop-up window, click ***OK.***

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.





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



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