MFG-33 Process Repair Orders

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. There are 14 steps to complete this process.

Step 1. Within the **Order Lines** table, select the **desired item** to return.

Step 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.

Image



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

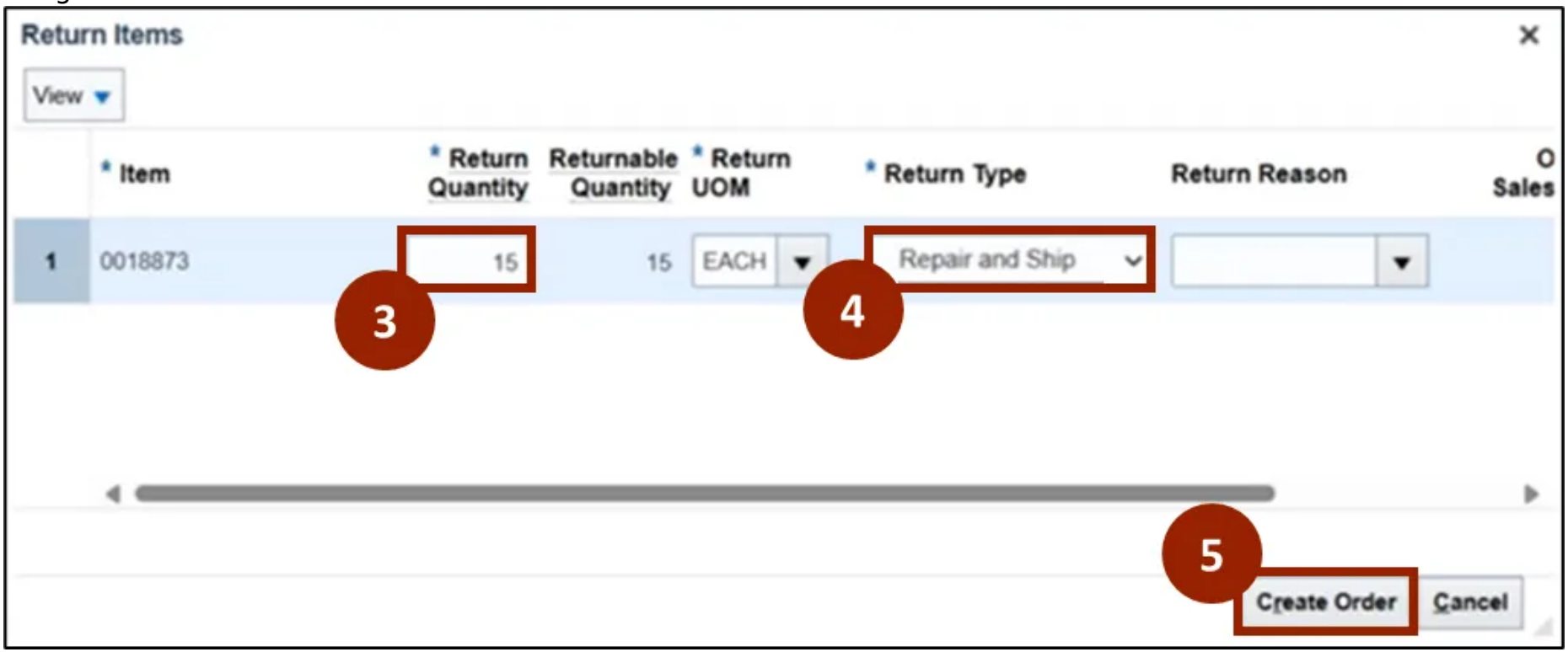
Step 3. In the **Return Quantity** field, enter the **number of items** the customer needs repaired.

Step 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.

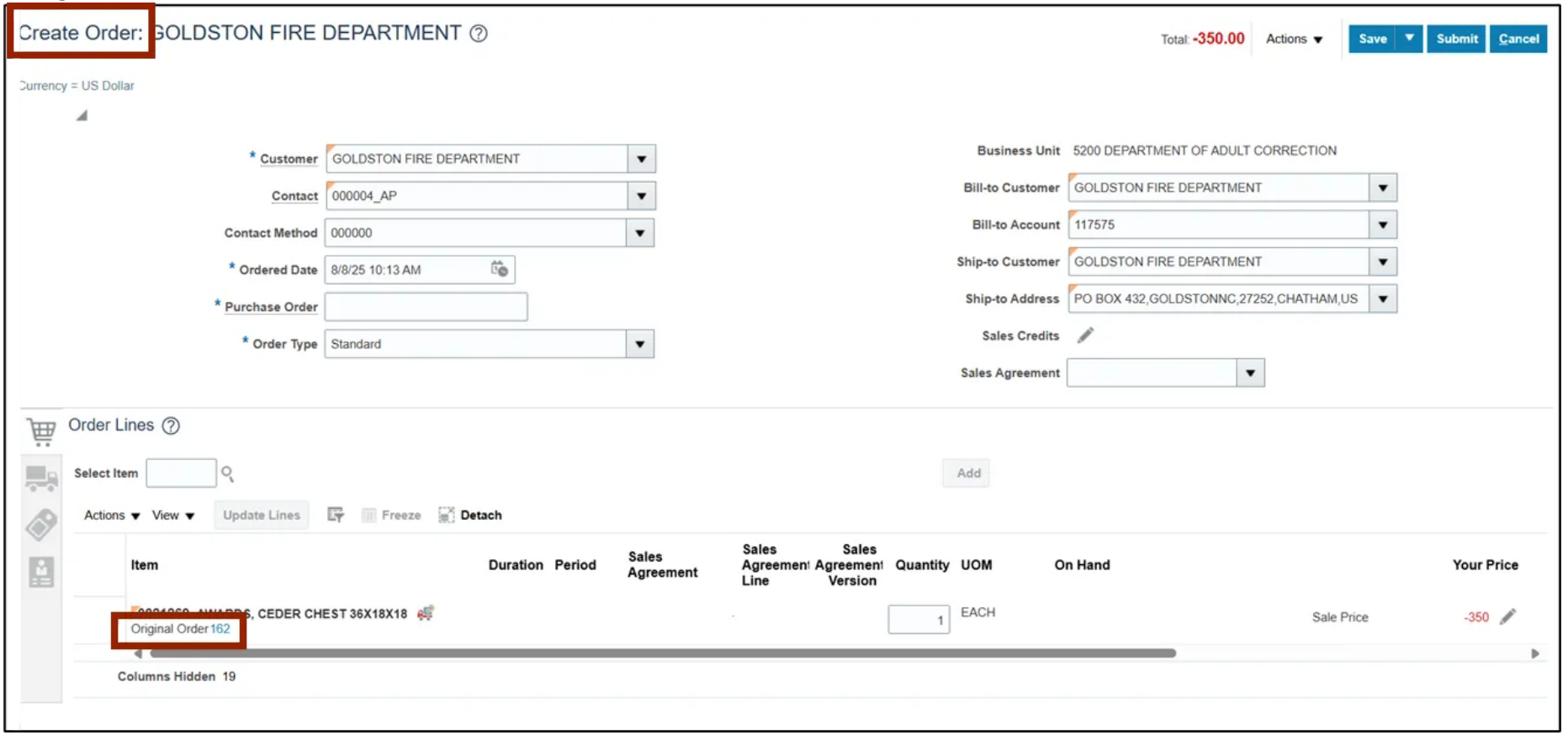
Step 5. Click the **Create Order** button.

Image



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.

Image

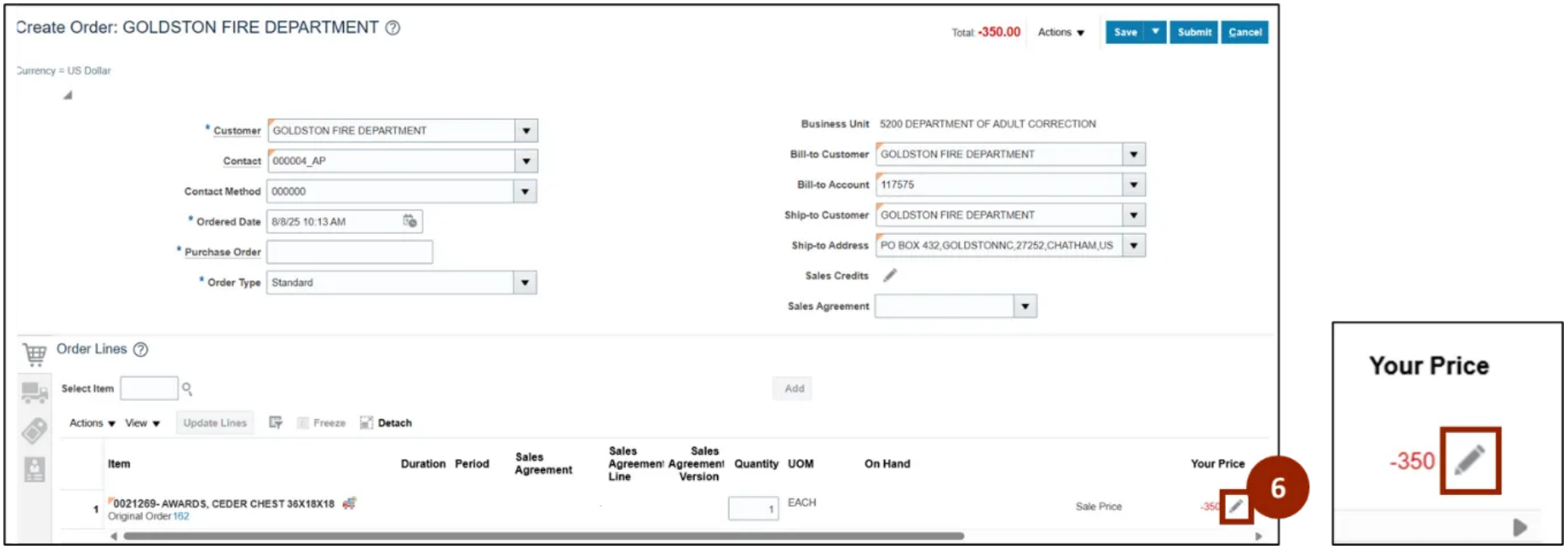


When processing a referenced repair order, item prices on the repair item line need to be adjusted manually to $0.00.

To adjust the item prices, follow these steps:

Step 6. Click the **Pencil** icon.

Image

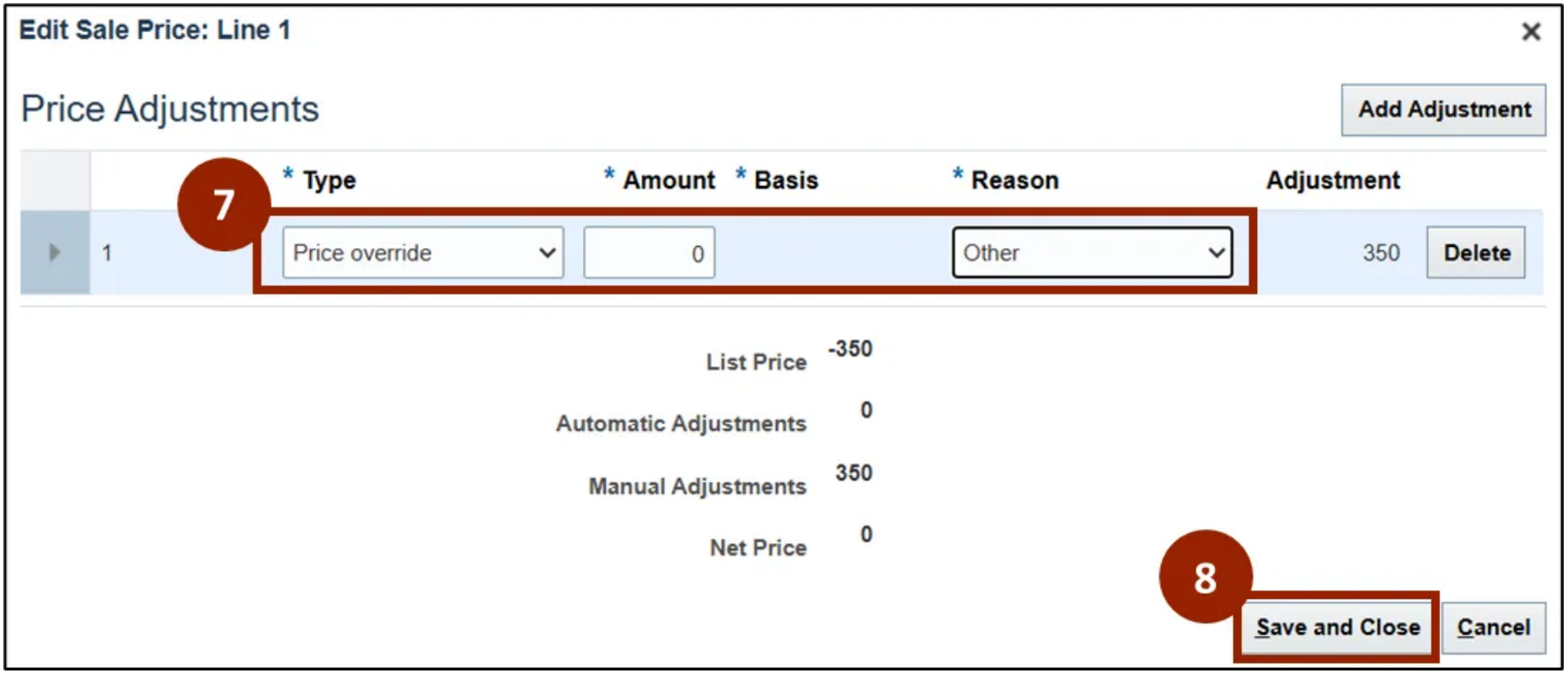


Step 7. In the **Price Adjustments Line** of the **Edit Sale Price** window, enter **information related to the adjustment** (e.g., Price override, 0, Other).

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

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

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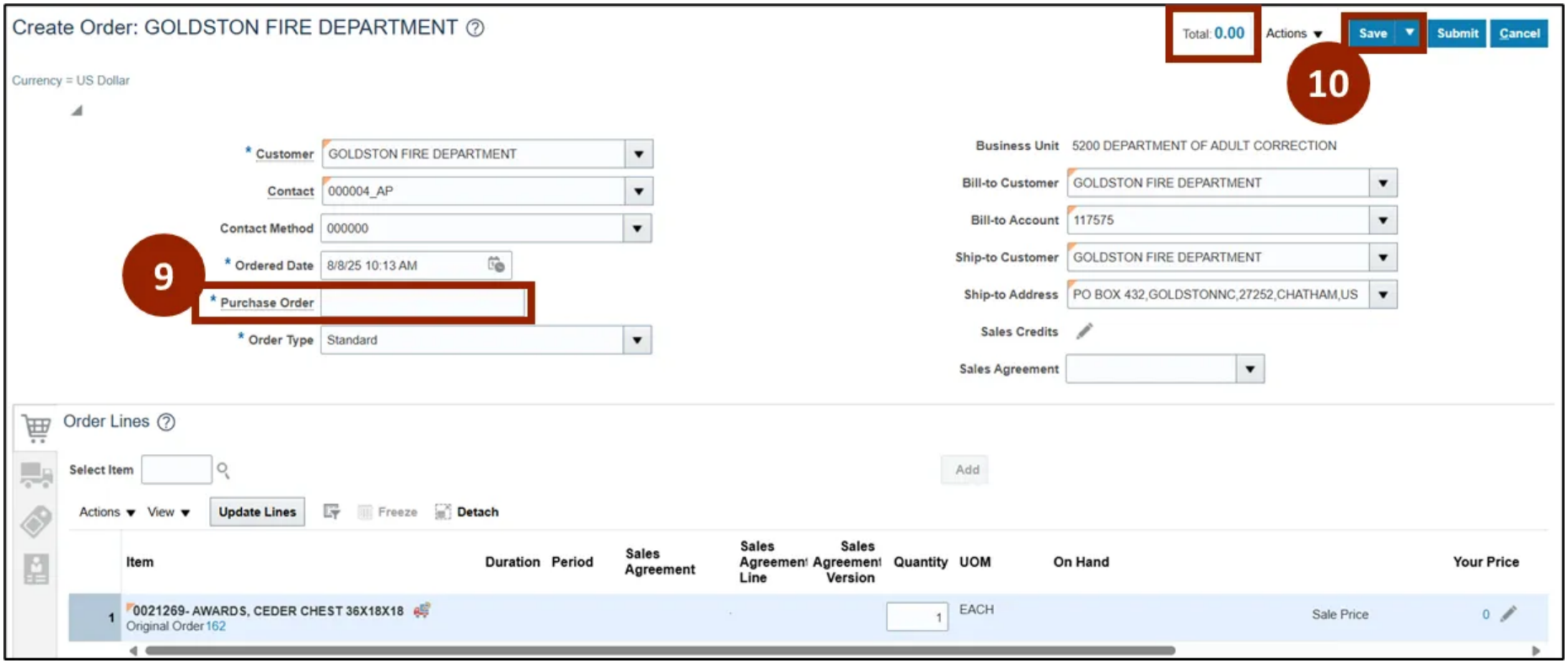


Note: Adjustments have been applied, and the price adjustment is reflected in the Total amount displayed at the top of the **Create Order** screen.

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

Step 10. Click the **Save** button.

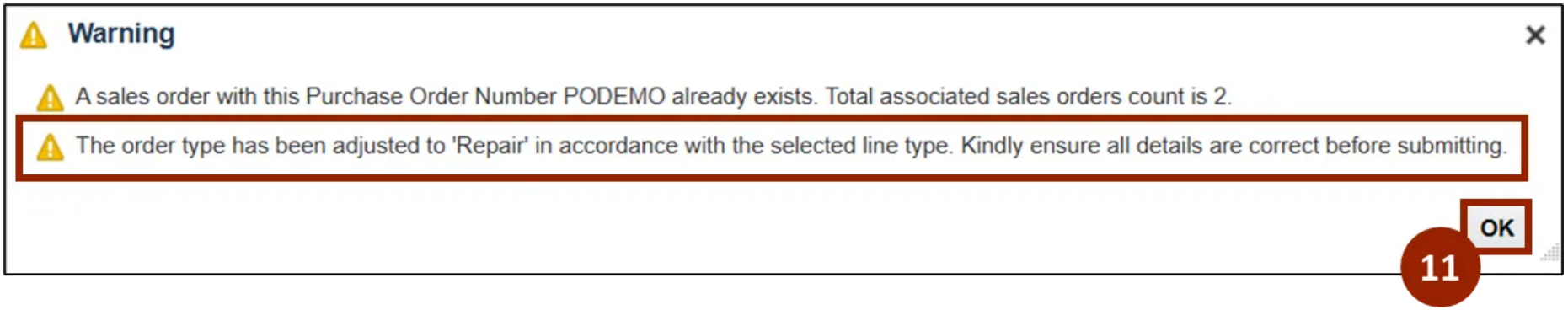
Image



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.

Step 11. Click **OK**.

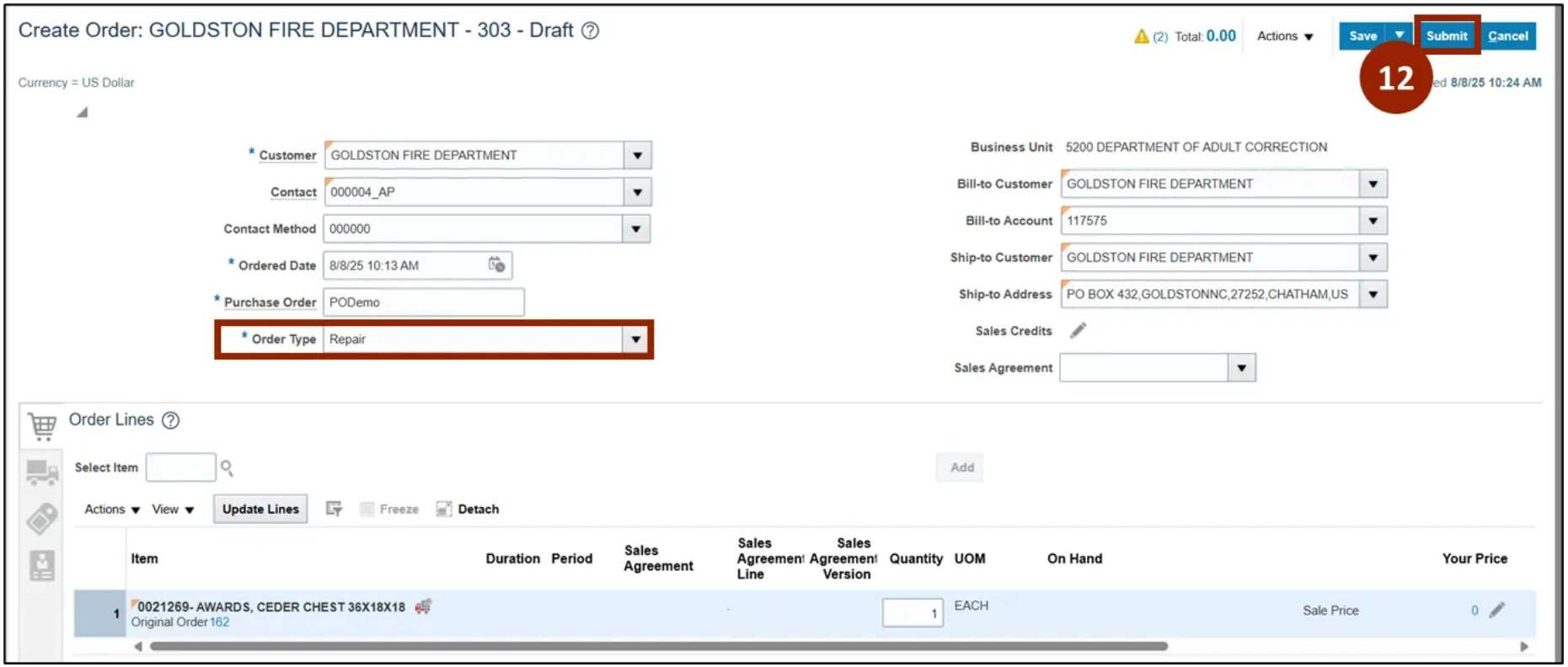
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Note: NCFS automatically changes the Order Type field to the appropriate selection.

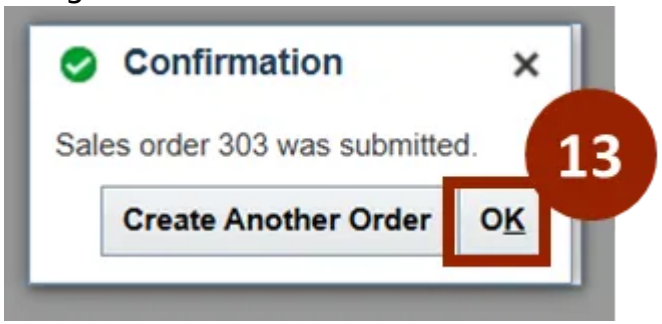
Step 12. Once all information has been verified, click **Submit**.

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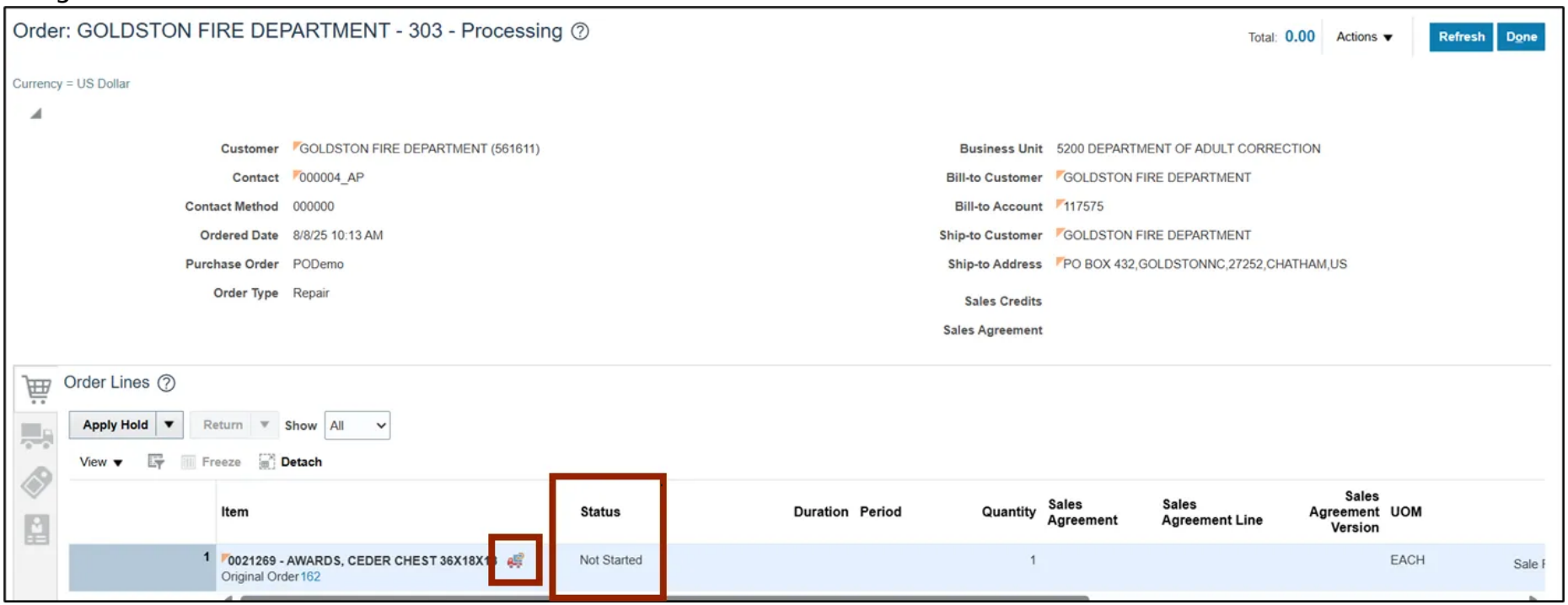
Step 13. On the **Confirmation** pop-up window, click **OK.**

Image



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.

Image



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

Image



Unreferenced Repair Order

To create an unreferenced repair order, from the **Create Order** screen, follow these steps. There are 11 steps to complete this process.

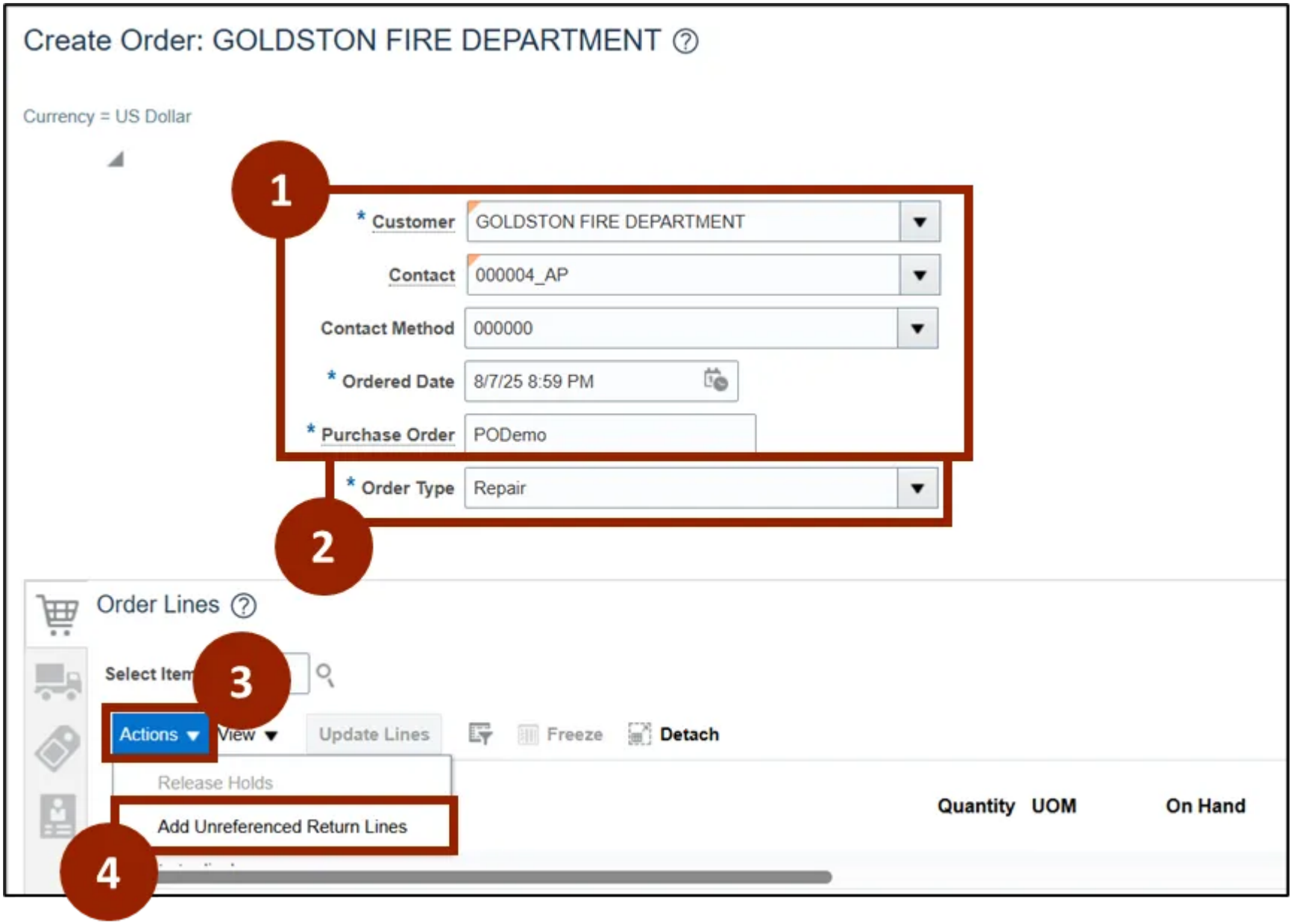
Step 1. Enter the appropriate information into the Header Detail fields such as **Customer** and **Purchase Order Number**.

Step 2. In the Order Type field, select **Repair**.

Step 3. Click the **Actions** button.

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

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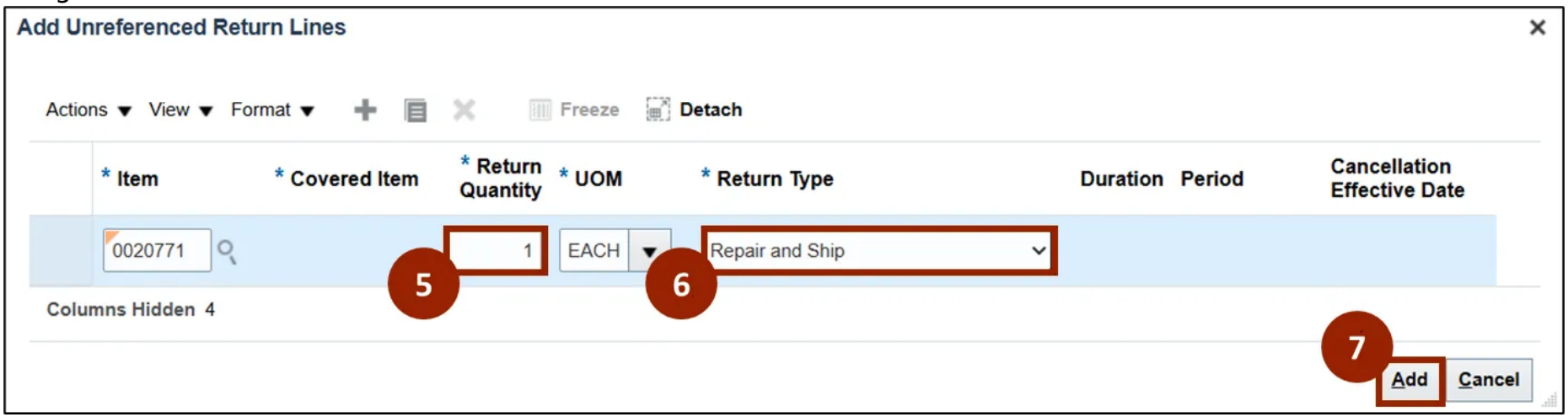


Step 5. In the Return Quantity field, enter the **number of items** the customer needs to return.

Step 6. In the Return Type drop-down field, select the **Repair and Ship** option.

Step 7. Click the **Add** button.

Image



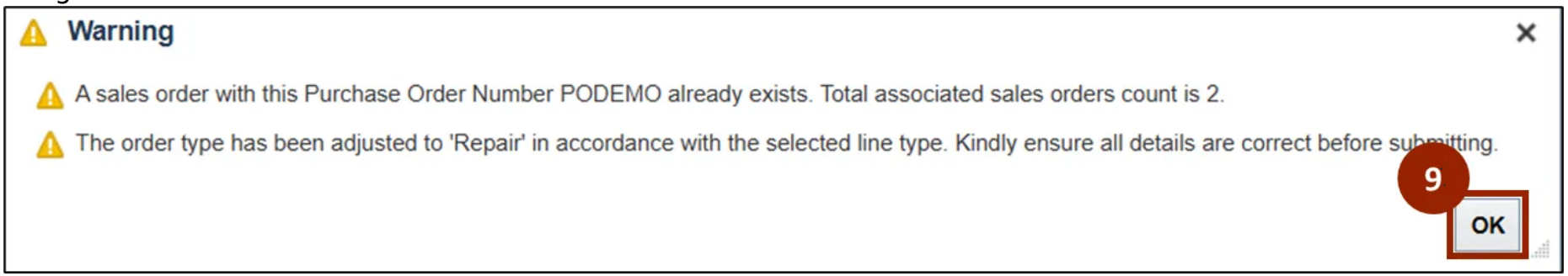
Step 8. Click the **Submit** button.

Image



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

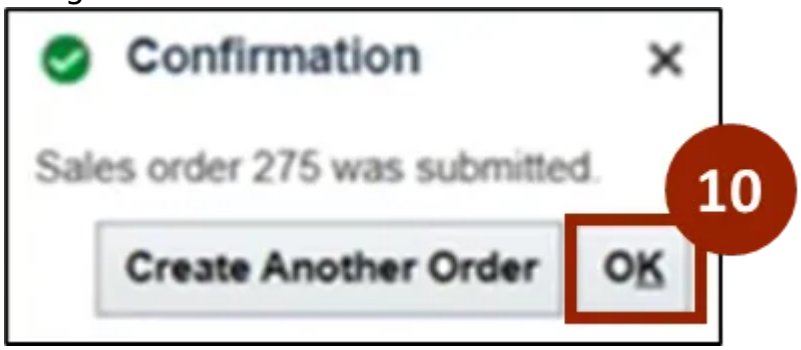
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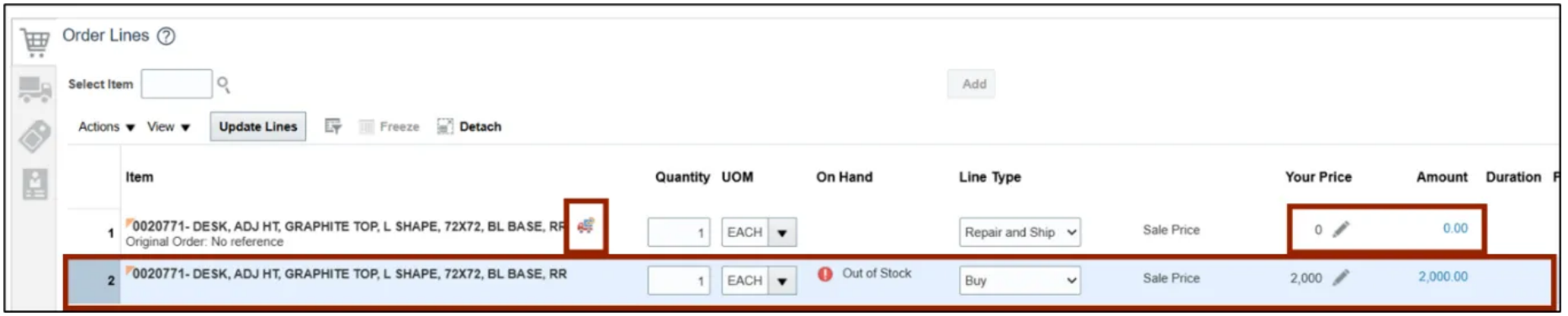
Step 10. On the **Confirmation** pop-up window, click **OK**.

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.

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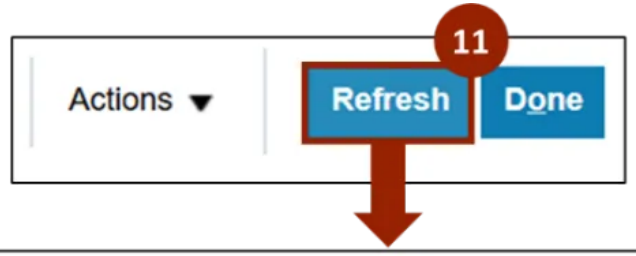


Image



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

Image





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

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