

21_Create Return Order

Purpose:	The purpose of this task is to create a Return order in Workday to send items back to a supplier.							
How to Access:	Open the My Recent Purchase Order worklet, click the Additional Actions button to the right of the required purchase order, and select Return > Create .							
Audience:	Buyers and Principals							
Helpful Hints:	 Be sure to keep in mind that only select users will have access to create Return orders in Workday. If you are not authorized to create purchase orders, you will not be able to access this task. A Return order can only be created for purchase orders that have been issued but not invoiced. Workday displays fields in this task that CMSD is not using, only the fields listed in this document require you to complete, review, and/or update. 							

Procedure: Complete the following steps to create a Return for a purchase order.

Create Return from Purchase Order

	unnion	r urchase ore	Jei									
ase be sure t	to select the ap	ropriate reason for you	r return. Please inclu	le the Return Materials Authorization # fr	om the supplier or any other information	that was provided by the supplier for your return	n.					
turn Number	r - new -											
Summa	lary				~ A	Additional Information						
npany	0	leveland Metropolitan S	School District		Purcha	ase Order PO-1000279						
plier		Iffice Depot			Curren	cy USD						
ırn Reason	*		=									
urn Date	*	04 / 04 / 2017										
plier Invoice	e Reference		:=									
nlier RMA												
no												
					h							
ods Lines	Attach	nents										
ods Lines	Attach 2 items	nents										
ods Lines ods Lines 2	2 items	nents						Quan	tity		Unit Cont	
iods Lines ids Lines 2	2 items Purct	nents ase Order Line	Item Description	Item	Spend Category	Item Identifiers	Ordered	Quan Approved Receipts	tity Aiready Returned	To Return	Unit Cost	t
ods Lines 2 ods Lines 2	2 items Purct P0-1000279 - L	menta ase Order Line ne 1	Elmers(R) Washable Disappearing Plube science 0 21 02, Pack Of 6 2 Bonus Sticks	Item	Spend Category 512SC Office Supplies	Item Identifiers Manufacturer Name : Eimer's Products, Inc. Manufacturer Part ID : E1591 UNSPSC : 44121631	Ordered 10	Quan Approved Receipts 2	tity Already Returned 0	To Return 0	Unit Cost 4.99	t Pac
ods Lines 2	2 Items Puret P0-1000279 - L P0-1000279 - L	menta ase Order Line ne 1	Item Description Element(k) Washable Diasposening Purple School Glue Sticka, 02 10 cz, Pack Sticka Office Zenus Sticka Office Zenus Sticka	Rem	Spend Category S128C Office Supplies S12SC Office Supplies	Item Identifiers Manufacturer Name : Einer's Products, Inc. Manufacturer Part ID : E1591 UNSPSC : 44121631 Manufacturer Part ID : W93443	Ordered 10	Quan Approved Receipts 2 1	tity Already Returned 0 0	To Return 0 0	Unit Cost 4.99 47.99	t Pac



1. As required, complete and/or review the following fields:

Field Name	Required / Optional	Description					
Supplier	Required	Identifies the vendor who will fulfill the order.					
Return Reason	Required	Identifies the reason why the items are being returned.					
Return Date	Required	Identifies the date for the return.					
Supplier Invoice Reference	Optional	Identifies the invoice number the supplier provided.					
Supplier RMA	Required	Identifies the supplier's return merchandise authorization number.					
Memo (Header Level)	Optional	Add any comments at the header level of the Return order.					

- 2. Scroll down to the purchase order line item(s) being returned.
- 3. As required, complete and/or review the following fields:

Field Name	Required / Optional	Description
Item Description	Required	Identifies the description of the item.
Ordered (Quantity)	Required	Identifies how many items were ordered.
Approved Receipts	Poquirod	Identifies the number of items that have been
(Quantity)	Required	received.
To Return (Quantity)	Required	Identifies the number of items being returned.
Memo (Line Item)	Optional	Add any comments specific to the line item.

- 4. Repeat <u>Step 3</u> for each line item being returned.
- 5. As required, complete one or more of the following:

If you want to	Then	Go To
Submit the Return order,	Click Submit .	<u>Step 6</u>
Save the Return order for processing at a later time,	Click Save for Later.	<u>Step 8</u>
Cancel the Return order,	Click Cancel .	<u>Step 9</u> <u>Note:</u> If canceling before Saving for Later, the return is deleted. If canceling after Saving for Later, only the submission is canceled, and the return order can be access from the purchase order in the My Recent Purchase Order worklet.



You have submitted Return

/ou have submitted Return: Office Depot on 04/04/2017 for \$4.99 (Actions)						
Process Successfully Completed	Do Another Create Return					
> Details and Process						
Done						

- 6. Review the displayed information.
- 7. Click **Done**, and go to the **Results** section of this document.

View Return

'iew Returi	n												X II (
Return Q,	Return Number RET-000002	2 Document Status Draft											
Summary						Purcha	ase Order PO-1000279						
Company	Cleveland Metropolitan Sch	hool District				Curren	icy USD						
Supplier	Ampuny Ceretaria Meno/Jointa Doller Office Rent Control Created by Tricia McKenney												
Return Reason	Damaged												
Return Date	04/04/2017												
Supplier Invoice	Reference (empty)												
Supplier RMA	111222333												
Memo	Several of the items were d	lamaged											
Return Lines 1	item											₿♀╟	
Return Line	Item and Category	Item Identifiers	Quantity	Unit Cost	Unit of Measure	Extended Amount	Business Document Line	Business Document Line Details	Location	Memo	*Fund	*Cost Cente	r
۹	Item	Manufacturer Name : Elmer's Products, Inc.	1	4.99	Pack	4.99	PO-1000279 - Line 1	Quantity Ordered 10			001FD_L General Fund	0210CC JFK PACT	^
	Item Description	Manufacturer Part ID : E1591 UNSPSC : 44121631						Approved Receipt Quantity					
	Elmers(R) Washable Disappearing							-					
	Pack Of 6 2 Bonus Sticks							Quantity Invoiced 0					
	Spend Category 512SC Office Supplies							Quantity Returned					
								1					-
•													•
Activity (0)													
(0)													
Туре *	"@" to tag someone.												

8. Review the displayed information, and be sure to record the PO number to be able to access the Return order.

<u>Note:</u> Use the **My Recent Purchase Orders** worklet to the purchase orders with the Return order.



Discard Changes

Discard Changes?									
Are you sure you want to discard changes made on this page?									
Discard	Continue								

 Click Discard to delete the Return order.
 <u>Note:</u> If canceling the Return after it has been saved, this pop-up window does not display, as Workday displays the View Purchase Order screen.

Result:

You have successfully created a Return order form a purchase order.

Note: For additional information on this order, click to the left of **Details and Process** and review the available details.