ReturnPro

CDW Vendor Policy Hub - Vendor User Guide DOC3953

Introduction

This guide helps vendors navigate the Vendor Policy Hub, a shared and independent workspace where vendors and retailers can administer contractual agreements and manage their return authorization process.

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Getting Started

About Vendor Policy Hub

The Vendor Policy Hub is a shared, independent platform designed to streamline collaboration between vendors and retailers. It enables each party to administer contractual agreements, manage return authorizations, and monitor related shipments and settlements.

- **Note:** Access and functionality within the Vendor Policy Hub may vary by retailer, vendor, or client configuration. Some users may not see all pages, tiles, or actions shown in this guide. Features displayed in screenshots represent the full range of available options but may differ based on your organization's permissions.

Glossary

Before getting started, review the key terms and concepts below to help you navigate the Vendor Policy Hub.

TERM	DEFINITION
Retailer	A business or individual that sells goods to consumers. Retailers purchase products from vendors or wholesalers to sell them in stores or online.
Vendor	A supplier of goods or services. Vendors provide products to retailers, who then sell them to the end consumers.
RA (Return Authorization)	A number or code assigned to a return request.
Settlement	A document detailing the debit issued for returned products. This statement outlines the amount debited from the vendor's account. [1]
Shipments	The transportation of returned items from the retailer back to the vendor or designated destination.
Policy	A classification of the guidelines that dictate the terms and conditions for product returns.
Policy Type	A classification of return policies based on the source or nature of the policy, namely: • **Vendor**: Policies set by the vendor for product returns. • **Retailer**: General policies for the retailer's overall return management. If a vendor policy is not configured, the retailer's policy will automatically apply for that vendor.

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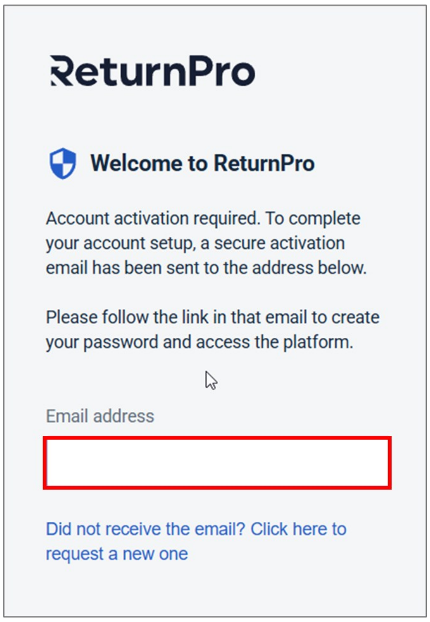
TERM	DEFINITION
Policy Status	The current state of a return policy, indicating its applicability and validity, namely: • **Active**: The policy is currently in effect and being enforced. • **Expired**: The policy is no longer valid or enforceable. • **Conflict**: The policy overlaps with another, requiring resolution before it can be enforced.
Disposition	The final decision on how a returned product will be operationally handled after it has been received, namely: • **Return to Vendor (RTV):** The product will be sent back to the vendor based on the vendor's return policy. • **Research**: The unit is routed for review when no matching policy can be found. • **Not eligible for return:** The product is not approved for physical return. This occurs when a virtual return is rejected or when pre-approval is denied, meaning the unit will never be received at a ReturnPro facility. • **Liquidate:** The product is routed to liquidation channels. • **Destroy:** The product cannot be returned or resold and is designated for disposal based on compliance or condition criteria. • **Recycle:** The product is designated for recycling channels.
Shipment Status	The current state of a shipment in the return process, namely: • **Shipped**: The shipment has been sent and is in transit.

[1] All financial debiting originates with the retailer.

Login

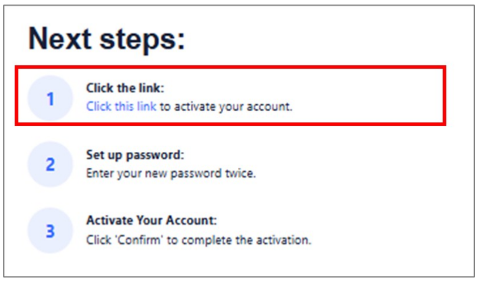
For Returning Users:

1. Go to cdw.returnpro.com/vendor-policy-hub.
2. Enter your **Email address** and **Password**, then select **Sign in**.
    - If the activation page below appears, enter your **Email address** and follow the *For New Users* steps.
    - If you have any issues signing in, please contact Client Support at (800) 941-4777, Monday through Friday, from 8 AM to 5 PM ET, or email cdw@returnpro.zendesk.com.



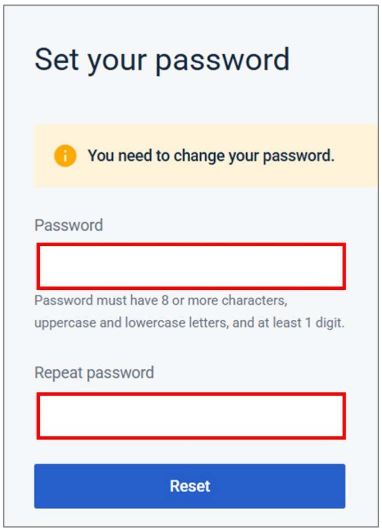
For New Users:

1. Open the “Action Required: Update Your ReturnPro Vendor Policy Hub Portal Password” email sent from noreply@returnpro.com.
    - If you did not receive an email, check your spam folder or contact Client Support at (800) 941-4777, Monday through Friday, from 8 AM to 5 PM ET, or email cdw@returnpro.zendesk.com.
2. In the email, select **Click this link** to open Vendor Policy Hub.

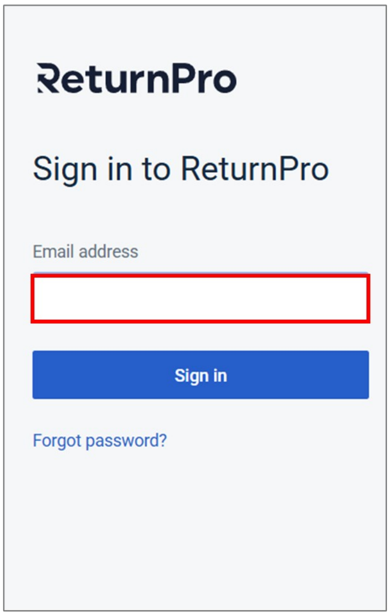


3. Enter your new password twice, and then select **Reset**.

- Passwords must have **8 or more characters**, **lowercase letters**, **uppercase letters**, and at least **1 digit**.
- Once your password is set, you will be directed to the sign-in page



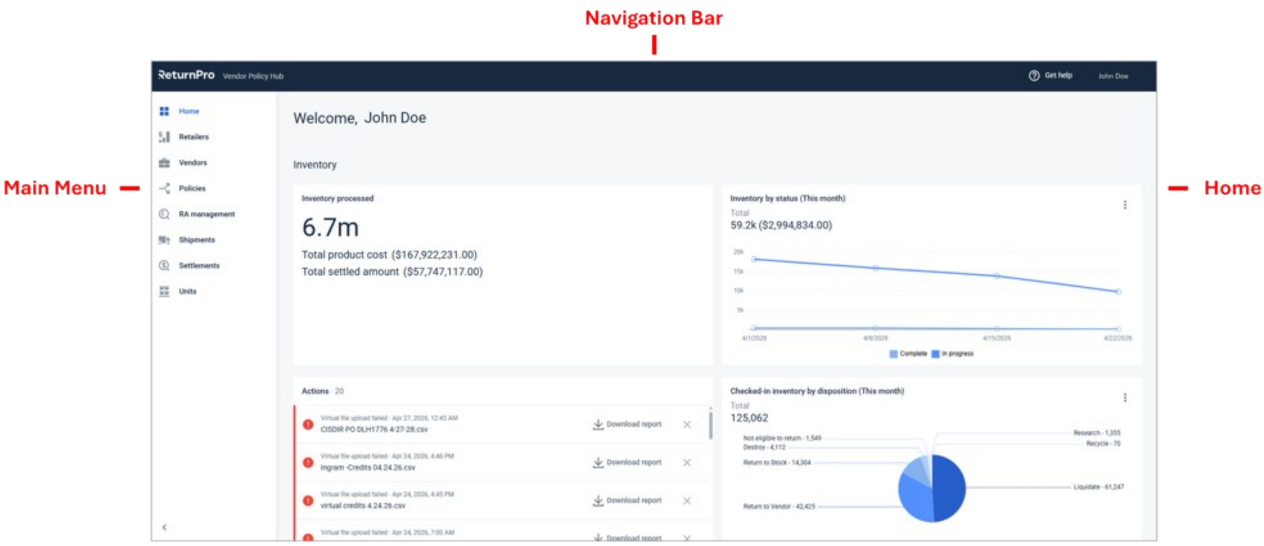
4. Enter your **Email address** and then select **Sign in**.



Navigation

After you log in, you will see the following:

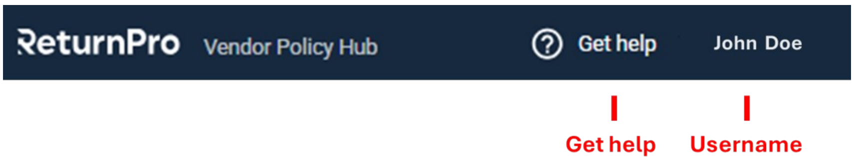
- **Navigation Bar**: The dark bar at the top of the screen. Access help and log out from here.
- **Main Menu**: The sidebar on the left. Access all pages and modules within Vendor Policy Hub.
- **Home**: View key metrics and data from other pages within Vendor Policy Hub.



Navigation Bar

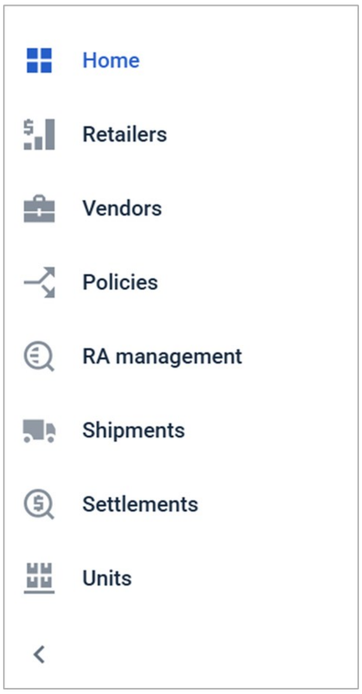
The navigation bar consists of the following menus and actions:

- **Get help**: Submit an issue or provide feedback. See *Reporting Issues and Feedback* for more information.
- **Username**: Hover over your username and select **Logout** to exit Vendor Policy Hub.



Main Menu

The Main Menu contains the following pages of the Vendor Policy Hub:



- **Home:** View a high-level summary of key metrics and activity related to your returns, including data pulled from other areas of the Vendor Policy Hub.
- **Retailers:** View a list of retailers you work with, along with related performance metrics such as inventory levels, disposition outcomes, and settlement activity.
- **Vendors:** View your vendor profile and associated details within the Vendor Policy Hub.
- **Policies:** View return policies assigned to your organization, including policy rules, requirements, and current status.
- **RA Management:** View and track return authorizations (RAs), including approval status, quantities, and related financial information.
- **Shipments:** Track the status and details of return-to-vendor (RTV) shipments, including shipment progress and delivery information.
- **Settlements:** View settlement statements and invoices related to returned products processed on your behalf.
- **Units:** View and track individual returned units, including processing status, disposition, and associated financial details.
    - To collapse the Main Menu, select **Collapse (<)** at the bottom.

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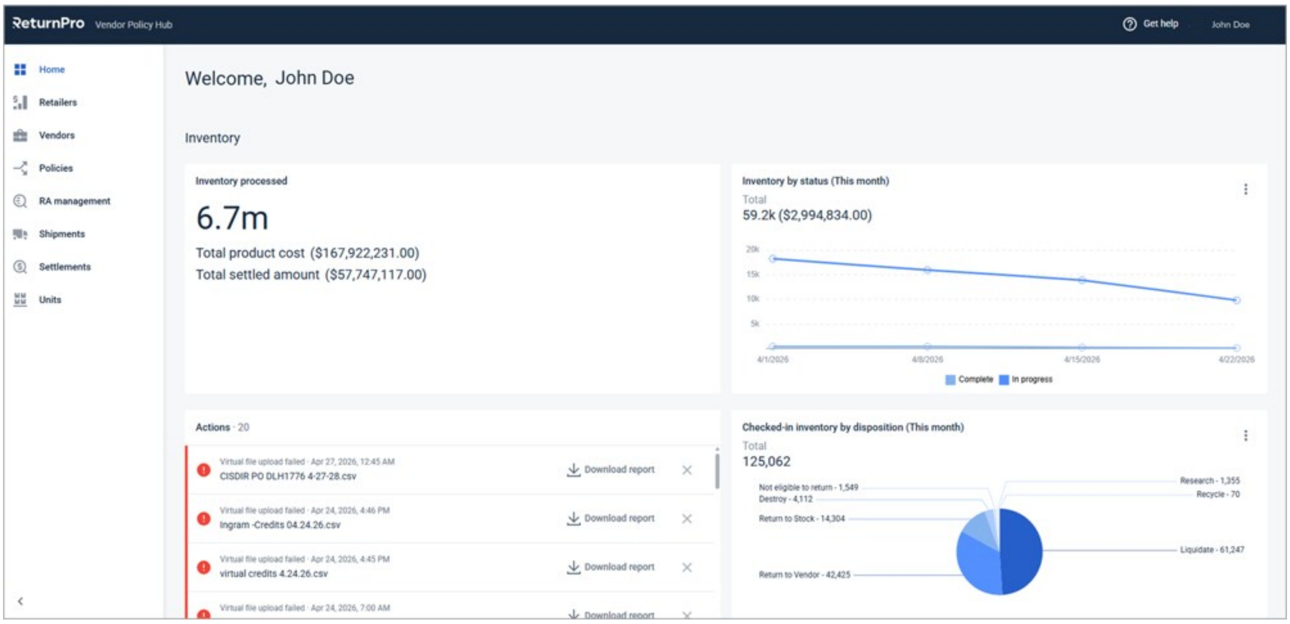
Home

The Home page contains tiles that summarize key metrics and data from other Vendor Policy Hub pages, organized into four sections: **Inventory**, **Shipments**, **Settlements**, and **Vendors and Policies**.



<u>Inventory</u>

This section provides a detailed breakdown of the inventory processed and its status, including the following tiles:

- **Inventory processed:** Track the total number of items processed, along with the associated product costs and the settled amounts.
- **Inventory by status:** Monitor the monthly changes in inventory status, including:
  - **Complete**: Items that have finished the check-in and evaluation process and have been assigned a final disposition.
  - **In progress**: Items that are currently moving through the check-in workflow and have not yet been given a final disposition.
    - Tiles that display the **More actions** (⋮) icon allow you to adjust the date range for their metrics. For more information, see the *Adjusting Tile Date Ranges* section.
- **Checked-in inventory by disposition:** Analyze the distribution of checked-in inventory, categorized by disposition.

<u>Shipments</u>

This section provides a comprehensive overview of total shipments and their statuses, featuring the following tiles:

- **RTV shipments**: Displays the total number of Return to Vendor (RTV) shipments for a specified time period, with options to view data by units, containers, settled amounts, or product costs.

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    - Select **Units**, **Container**, **Settled amount**, or **Product cost** to adjust the type of data that is displayed in the chart.
    - Tiles that display the **More actions** *(⋮)* icon allow you to adjust the date range for their metrics. For more information, see the *Adjusting Tile Date Ranges* section.
- **Number of shipments by status**: Displays the total count of shipments categorized by their current status, including:
    - **Shipped**: Products that have left a ReturnPro logistics center.

Settlements

This section displays invoice amounts over time, helping users understand how invoices are allocated based on different return and liquidation processes.

- **Settled amount by disposition**: Shows total invoice amounts by disposition with options to view data as units, settled amounts, or product costs over a specified period.
- **Settled amount by status:** Displays the total invoice amounts over time, categorized by their status, with options to view data in terms of units, settled amounts, or product costs. Statuses include:
    - **Created**: Indicates invoices that have been generated but not yet finalized or processed.
    - **Cancelled**: Represents invoices that were voided or withdrawn before completion.
    - **Closed**: Refers to invoices that have been fully processed, settled, and completed.
    - **Disputed:** Indicates invoices that are on hold due to a vendor dispute and require resolution before settlement can proceed.
    - **Pending Cancellation:** Represents invoices awaiting receipt of refusal units or manual cancellation due to exceptions or special review.

Vendors and Policies

This section provides an overview of the total number of policies by their statuses and disposition.

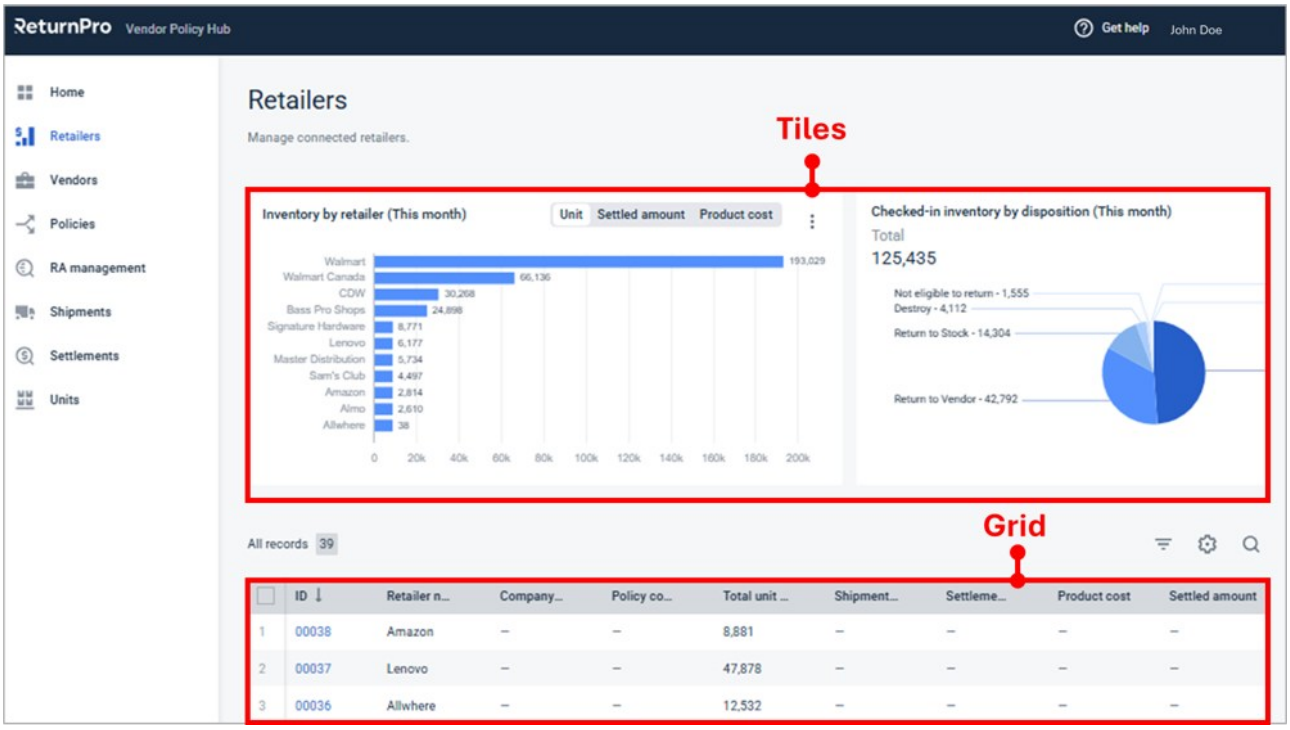
- **Top 10 vendors**: Displays the top 10 vendors associated with your organization, including the quantity processed, total settled amounts, and product costs for each vendor.
- **Total vendors added**: Displays the total number of vendors associated with your organization that were added during the selected reporting period. A comparison indicator below shows the percentage change from the previous period.
- **Number of policies by status**: Shows the total number of policies, categorized by their current status, providing an overview of policy distribution. Statuses include:
    - **Active:** Indicates policies that are currently in effect and available for use.
    - **Expired:** Indicates policies that have passed their effective end date and are no longer valid.
    - **Missing information:** Indicates policies that could not be activated due to incomplete or missing required details.
- **Number of policies by disposition**: Displays the number of policies applied across each disposition within the selected timeframe.

[2]Tiles display data from the current month by default. If no activity has occurred within this period, no data will be shown.

Retailers

The **Retailers** page displays information about the retailers your organization works with, including return activity and performance metrics, organized into tiles and a grid.

- For more information about available grid commands, such as using grid filters, saving filter presets, configuring grid columns, and saving column presets, refer to the *Grid Actions* section.



Tiles

The following tiles are available on the Retailers page:

- **Inventory by retailer**: Displays the total number of return units for your products by retailer for a specified time, with options to view data by **Unit**, **Settled amount**, or **Product cost**.
  - Tiles that display the **More actions** *(⋮)* icon allow you to adjust the date range for their metrics. For more information, see the *Adjusting Tile Date Ranges* section.
- **Checked-in inventory by disposition**: Displays the number of your return units checked in for a specified time, grouped by disposition.
- **RA requests by disposition**: Shows the number of RA requests submitted for your products for a specified time, grouped by disposition.

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Grid

See the table below for more information related to the fields in the Retailers grid.

- Fields are listed in alphabetical order for readability and may not match the order or visibility settings in the system.
- ***Denotes fields that are hidden by default. To display these fields, click the **Table Settings** ( ) icon, select **Configure columns**, check the box next to the desired field, and click **Apply**. For more information about using the commands on this page, refer to the *Commands* section.

FIELD	DESCRIPTION
Company website	URL of the retailer's official website.
ID	Unique identifier assigned to each retailer record in the system. • **Note**: Clicking this number will display a vertical view of the fields in the grid
Policy count	Total number of return policies currently associated with the retailer for your products. • **Note:** Clicking this number opens the Policies page, where you can view additional information about each policy. For more information, see the *Policies* section.
Product cost	Combined product cost of all return units associated with the retailer for your products.
RA request count*	Number of RA requests submitted for your products by the retailer. • **Note:** Clicking this number opens the *RA management* page, where you can view additional information about each RA. For more information, see the *RA Management* section.
Retailer name	Name of the retailer your organization works with, as registered in the system.
Settlement count	Number of settlements issued for returned products processed for the retailer. • **Note:** Clicking this number opens the *Settlements* page, where you can view additional information about each settlement. For more information, see the *Settlements* section.
Settled amount	Displays the total settled amount received for processed returns, calculated as the combined sum of the product cost and any applicable fees (such as restocking or handling fees).
Shipment count	Number of shipments associated with the retailer's return activity. • **Note:** ◦ Clicking this number opens the *Shipments* page, where you can view additional information about each shipment. For more information, see the *Shipments* section. ◦ If this field is blank, it indicates that no shipments have been sent to your

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FIELD	DESCRIPTION
	organization yet.
Total unit processed	Total number of return units processed for your products by the retailer within the selected time period.

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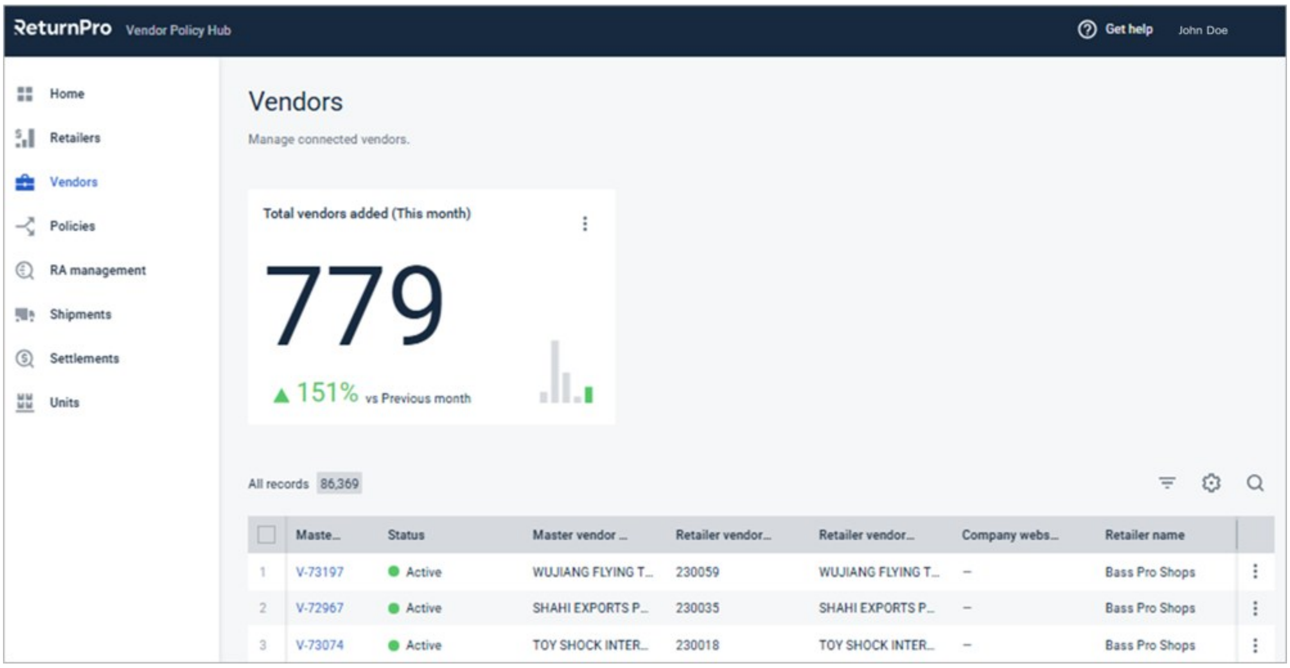
Vendors

The **Vendors** page presents detailed information about your organization as a vendor, organized into a tile and a grid.

- For more information about available grid commands, such as using grid filters, saving filter presets, configuring grid columns, and saving column presets, refer to the *Grid Actions* section.



Tile

The **Vendors** page contains the **Total vendors added** tile, which displays the total number of vendor records associated with your organization during the selected reporting period. A comparison indicator below shows the percentage change from the previous period.

- Tiles that display the **More actions** *( )* icon allow you to adjust the date range for their metrics. For more information, see the *Adjusting Tile Date Ranges* section.

Grid

See the table below for more information related to the fields in the Vendors grid.

- Fields are listed in alphabetical order for readability and may not match the order or visibility settings in the system.
- ***Denotes fields that are hidden by default. To display these fields, click the **Table Settings** ( ) icon,

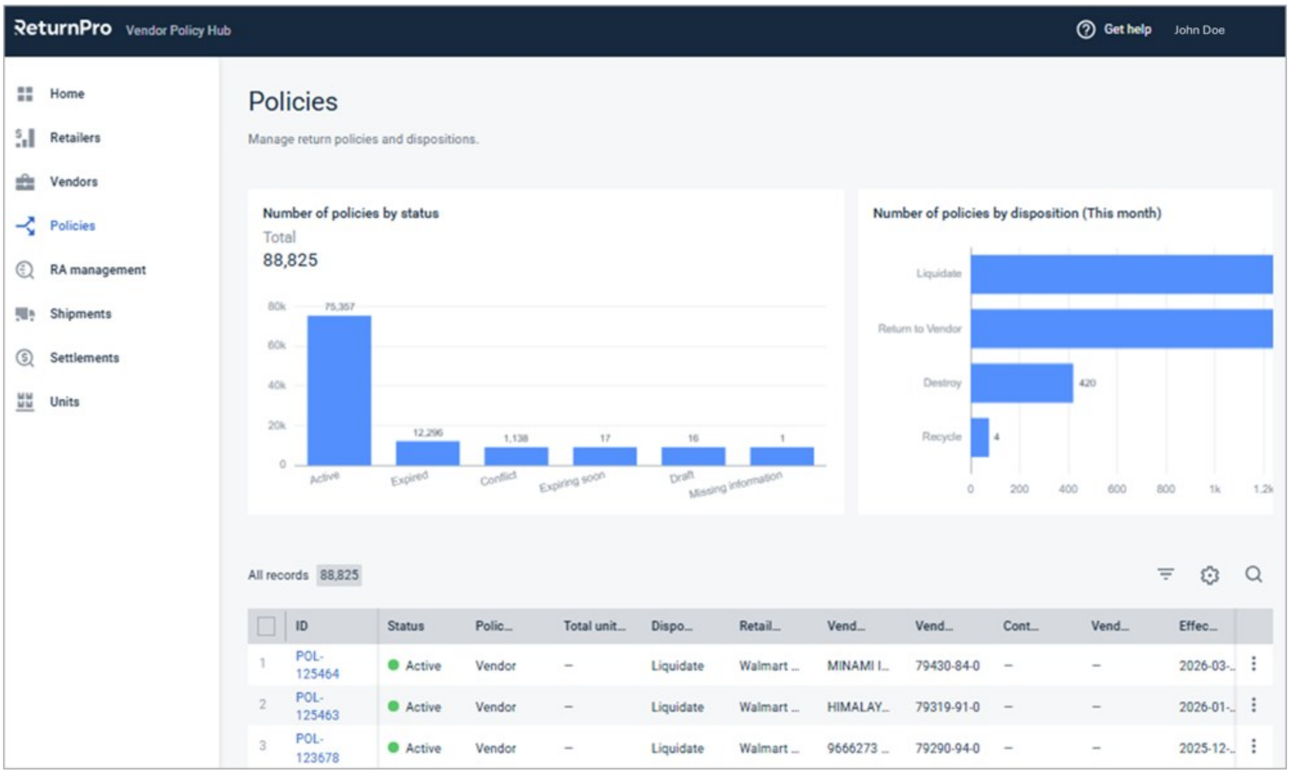
select **Configure columns**, check the box next to the desired field, and click **Apply**. For more information about using the commands on this page, refer to the *Commands* section.
- **Denotes fields that are only visible after selecting the **Master vendor ID**.

FIELD	DESCRIPTION
Active business hours**	Displays your organization's standard operating hours, indicating when you are available to receive communications or process returns.
Company phone**	Primary business contact number listed for your organization.
Company website	URL of the retailer's official website.
Created on*	Date your vendor record was created in the system.
Master vendor ID	Unique identifier assigned to your master vendor record. Selecting this number displays a detailed view of your vendor profile fields, organized into the following sections: • **Overview:** Displays key vendor identifiers and general information such as vendor name, retailer association, and status. This section provides a high-level summary of your vendor profile. • **Business hours:** Lists your organization's regular operating hours. • **Business address:** Official address of your organization's office or headquarters. • **Email notifications:** Automated emails sent to your organization with shipment updates, including tracking numbers, shipment details, and destination addresses.
Master vendor name	Name of the primary vendor record that groups multiple vendor records belonging to the same organization, such as different subsidiaries.
Retailer name	Name of the retailer your organization works with, as registered in the system.
Retailer vendor name	Vendor name used by the retailer to reference your organization.
Retailer vendor number	Unique identifier assigned to your organization by the retailer.
Return address**	Address where customers should send returned products for processing by your organization.
Return contact**	Designated contact at your organization responsible for managing product returns and coordinating return procedures.
Status	Current operational status of your vendor record, where: • **Active:** Your organization has an active return policy with the retailer. • **Inactive:** Your organization is no longer active in the retailer's system.
Vendor type*	Identifies whether your organization is classified as a **Distributor** or **Manufacturer**.

Policies

The Policies page outlines the return policies that apply to your products. The information is organized into tiles and a grid.

- For more information about available grid commands, such as using grid filters, saving filter presets, configuring grid columns, and saving column presets, refer to the *Grid Actions* section.



Tiles

The following tiles are available on the Policies page:

- **Number of policies by status**: Shows the total number of policies, categorized by their current status, providing an overview of policy distribution. Statuses include:
  - **Active:** Indicates policies that are currently in effect and available for use.
  - **Expired:** Indicates policies that have passed their effective end date and are no longer valid.
  - **Missing information:** Indicates policies that could not be activated due to incomplete or missing required details.
- **Number of policies by disposition**: Displays the number of policies applied across each disposition within the selected timeframe.
  - Tiles that display the **More actions** *(⋮)* icon allow you to adjust the date range for their metrics. For more information, see the *Adjusting Tile Date Ranges* section.

Grid

See the table below for more information related to the fields in the Policies grid.

- Fields are listed in alphabetical order for readability and may not match the order or visibility settings in the system.
- ***Denotes fields that are hidden by default. To display these fields, click the **Table Settings** ( ) icon, select **Configure columns**, check the box next to the desired field, and click **Apply**. For more information about using the commands on this page, refer to the *Commands* section.
- ****Denotes fields that are only visible after selecting the **ID**.

FIELD	DESCRIPTION
Allow replacement**	Indicates whether the approval type for this policy allows replacement units, or if the policy is limited to credit-only resolutions.
Contact name	Name of the primary contact person for the policy.
Contact phone number	Phone number of the contact person.
Created on*	Date the policy was created in the system.
Disposition	The final decision on how a returned product will be operationally handled after it has been received, namely: • **Return to Vendor (RTV):** The product will be sent back to the vendor based on the vendor's return policy. • **Research**: The unit is routed for review when no matching policy can be found. • **Not eligible for return:** The product is not approved for physical return. This occurs when a virtual return is rejected or when pre-approval is denied, meaning the unit will never be received at a ReturnPro facility. • **Liquidate:** The product is routed to liquidation channels. • **Destroy:** The product cannot be returned or resold and is designated for disposal based on compliance or condition criteria.
Effective date	Date when the policy becomes effective.
Eligible for settlement* / Eligibility for settlement**	Indicates whether the product is eligible for invoicing based on the policy conditions. A value of "True" means the product qualifies to be invoiced, while "False" means it does not.
Expiry date	Vendor policy expiration date.
File for RTV settlement when unit status is**	Defines the unit status condition under which the RTV (Return to Vendor) settlement file is generated.

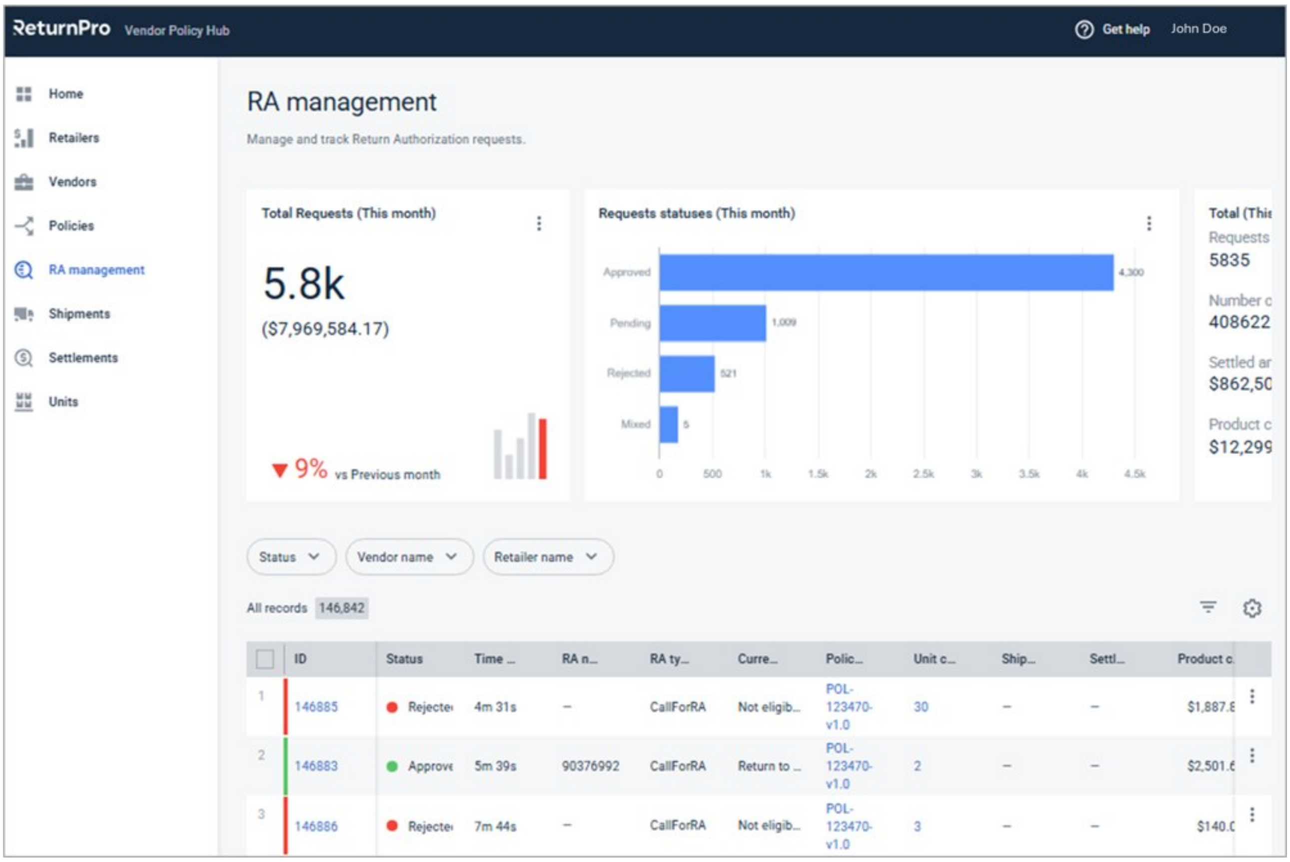
FIELD	DESCRIPTION
Fulfillment type	Indicates the fulfillment method defined under the policy, such as Fulfillment by Retailer.
ID	Unique identifier for each policy. Clicking this number will display a vertical view of the fields in the grid, organized into the following sections: • **Overview:** Displays general policy information, including the policy type, retailer name, and effective date. • **Policy rules:** Lists all conditional rules that define when the policy applies. Includes manufacturer codes, product categories, and their associated outcomes such as *Disposition* and *Eligibility for settlement.* • **Assessment requirements:** Outlines any additional conditions or steps that must be met before a return can be processed, including RA requirements and alternative dispositions for rejected RTV units. • **Shipping info:** Displays the return shipping method used for products under this policy. • **Settlements:** Shows settlement generation details, such as the scheduled settlement cadence, applicable unit status, and replacement or invoicing eligibility.
If vendor rejects RTV units, credit won't be filed and the policy will follow the alternative disposition...	Indicates whether RTV units rejected by your organization will bypass settlement processing and instead follow the policy's alternative disposition.
Policy type	A classification of return policies based on the source or nature of the policy, namely: • **Vendor**: Policies set by the vendor for product returns. • **Retailer**: General policies for the retailer's overall return management. If a vendor policy is not configured, the retailer's policy will automatically apply for that vendor.
RA number** / Return authorization #	A unique identifier assigned to a return request used to authorize and track the return through processing and resolution.
Retailer name** / Retailer	Name of the retailer your organization works with, as registered in the system.
Return authorization** / RA requirement	Indicates whether an RA is required before the item can be returned or invoiced.
	Method used for returning items, determined by your organization's return policy and operational setup. Options include: • **Com Carrier Collect:** Returns are shipped using a common carrier where freight

FIELD	DESCRIPTION
Return method	charges are billed to the recipient (collect). • **Parcel Collect:** Returns are sent via parcel carrier (e.g., FedEx, UPS) using collect billing or the retailer's account. • **Vendor Pickup:** Your organization is responsible for scheduling and retrieving returns directly from the retailer's facility. • **Virtual Return:** No physical shipment occurs; return is processed virtually, often used for digital goods or cases where the product is scrapped or destroyed on-site.
Settlement generation cadence**	Defines how often settlements are generated for your organization (e.g., daily, weekly, or monthly).
Shipping address	Destination address for shipments associated with the policy. To edit the Shipping address, see the *Update RA Shipping Address* section.
Shipping carrier	Carrier(s) used for shipping the items covered by the policy.
Status	Indicates the current state of the policy within the ReturnPro system. Each status reflects a different stage of configuration or activity: • **Active:** Policy is currently in effect and available for use. • **Conflict:** A conflict exists between this policy and another policy's configuration or effective period. • **Draft:** Policy is being created or edited and is not yet active. • **Expired:** Policy has reached its expiration date and is no longer active. • **ExpiringSoon:** Policy is approaching its expiration date; system flag indicates upcoming renewal or review. • **MissingInfo:** Required fields or parameters are incomplete, preventing the policy from activating. • **Published:** Policy has been finalized and approved for activation but not yet in effect. • **Validation:** Policy is undergoing system validation checks to confirm data accuracy and configuration integrity.
Total unit processed	Total number of return units processed for your products by the retailer within the selected time period.
Vendor email address	Email address of your organization's contact person.
Vendor name	Name of your organization associated with the policy.
Vendor number	Unique identifier for your organization.
Vendor pre-approval**	Indicates whether vendor pre-approval is required before a product can be returned under this policy.
Version*	The current version number of this policy.

RA Management

The **RA management** page displays all RA requests submitted for your products, including their current statuses, associated retailers, and product details, organized into tiles and a grid.

- For more information about available grid commands, such as using grid filters, saving filter presets, configuring grid columns, and saving column presets, refer to the *Grid Actions* section.



Tile

The following tiles are available on the RA management page:

- **Total requests:** Displays the total number and combined product cost of RA requests submitted for your products during the selected time period, along with the percentage change compared to the previous period.
  - Tiles that display the **More actions** *(⋮)* icon allow you to adjust the date range for their metrics. For more information, see the *Adjusting Tile Date Ranges* section.
- **Request statuses:** Shows a breakdown of all RA requests for your products during the selected time period by their current status (**Approved**, **Rejected**, **Mixed**, or **Cancelled**).

- **Total:** Summarizes key RA metrics for the selected time period, including total requests, number of units, settled amount, and product cost related to your products.
- **RA requests by disposition:** Displays a chart showing how RA requests for your products are distributed by disposition for the selected time period, grouped by retailer.

Grid

See the table below for more information related to the fields in the RA management grid.

- Fields are listed in alphabetical order for readability and may not match the order or visibility settings in the system.
- *Denotes fields that are hidden by default. To display these fields, click the **Table Settings** ( ) icon, select **Configure columns**, check the box next to the desired field, and click **Apply**. For more information about using the commands on this page, refer to the *Commands* section.
- **Denotes fields that are only visible after selecting the **Request ID**.

FIELD	DESCRIPTION
Allow replacement*	Indicates whether the approval type for this policy allows replacement units, or if the policy is limited to credit-only resolutions.
Alternative disposition*	Secondary or fallback disposition if the initial disposition cannot be fulfilled.
Approval type	Indicates how the return request will be fulfilled once approved. • **Credit:** The request is approved for financial reimbursement; no replacement product will be sent. • **Replace:** The request is approved for a replacement product rather than a monetary credit.
Automated shipment*	Shows whether the shipment associated with this RA was automatically generated by the system.
Calculation**	Displays the calculation method or formula used to determine the settled amount, including applicable deductions, credits, and fees based on policy settings.
Cancellation reason*	Explains why the RA was canceled, if applicable.
Carrier*	Name of the carrier used for return shipment (e.g., FedEx, UPS, USPS).
Claim ID	Identifier linking the settlement to a specific claim record for tracking and auditing purposes.
Created date**	Date when the settlement record was created in the system.
Created on	Date and time when the RA request was submitted.

FIELD	DESCRIPTION
Current disposition	Latest assigned disposition for the returned product.
Estimated handling fee	Dollar amount assigned by the retailer, when applicable, during check-in to cover anticipated processing costs. This value is typically calculated as a percentage of the *Product cost* (e.g., 4%) and is sent with the initial notification. It is for reference only and may differ from the final handling fee applied at settlement.
Estimated restocking fee**	Displays the projected restocking fee, when applicable, for the unit prior to final settlement. This value is calculated according to policy rules and may differ from the actual charged fee after reconciliation.
Estimated settled amount	Estimated total settlement value (**Product cost** + **estimated fees**), calculated after check-in. This may differ from the final settled amount. • For more information about estimated fees, see the vendor/retailer policy.
Handling fee	A charge imposed by the retailer, when applicable, to cover the operational costs associated with processing and shipping returned items.
ID	Unique identifier automatically assigned to each RA request. • **Note**: Clicking this number will display a vertical view of the fields in the grid.
Initial disposition*	The original disposition assigned when the return was first created.
Internal notes**	Notes entered by the retailer to provide additional context, instructions, or clarification related to the RA request.
Inventory type	Indicates the classification of the product. Options include: • **Physical:** Tangible inventory such as hardware or accessories. • **Virtual:** Intangible goods such as software licenses or activation codes.
Policy	Return policy that governs the request's approval rules and processing requirements.
Policy ID	Identifies the specific return policy governing how the RA request is reviewed and processed. • **Note:** Clicking this number opens the *Policies* page, where you can view details such as eligibility rules, fulfillment type, and disposition outcomes.
Process by unit*	Indicates whether the request is processed on a per-unit basis rather than by shipment.
Product cost	Combined product cost of all return units associated with the retailer for your products.
Purchase order number	Original purchase order number issued by your organization for this unit.

FIELD	DESCRIPTION
RA number	A unique identifier assigned to a return request used to authorize and track the return through processing and resolution.
RA type	RA type assigned to the associated RA request, based on policy. • **Blanket RA:** Units returned under a standing agreement without prior approval. • **Call for RA:** Requires your organization's approval before return. • **No RA required:** Unit can be returned without initiating an RA request.
Rejection reason**	Provides a reason if the unit's RA request was rejected. • **Negotiation pending:** The request is under discussion between retailer and your organization. • **Did not follow policy:** The request does not meet the governing policy requirements. • **Did not capture necessary information:** Key details required for processing were missing. • **Over timeframe allowed:** The request was submitted past the allowable time window. • **Keep in store:** The unit should remain with the retailer and will not be returned. • **Destroy in field:** The unit should be destroyed on-site rather than shipped back. • **Not my product:** Your organization determined the item does not belong to them. • **Other: Specify a reason:** A custom rejection reason entered manually by the reviewer.
Response due date*	Date by which your organization must respond to the RA request.
Restocking fee	Fee charged by the retailer, when applicable, to cover the costs associated with reintegrating returned products into inventory.
Retailer name	Name of the retailer your organization works with, as registered in the system.
Return authorization	Displays the type of RA process being used. Common options include: • **Blanket RA** – A single RA that covers multiple return instances or shipments. • **Call for RA** – The retailer must contact **your organization** to request approval before returning the item. Your organization reviews the request and issues an RA number if the return is accepted. • **No RA Required** – An RA number is not needed for this return. The retailer may ship or process the return without obtaining prior authorization from your organization, typically based on policy rules.
Return type	Identifies the type of return associated with the record, based on how the item was returned and processed. • **CustomerReturn:** The item was returned by an end customer through the retailer's return process. • **NonCustomerReturn:** The item was not returned by an end customer (for example, operational returns such as store stock adjustments, damages, or other non-customer-driven returns).

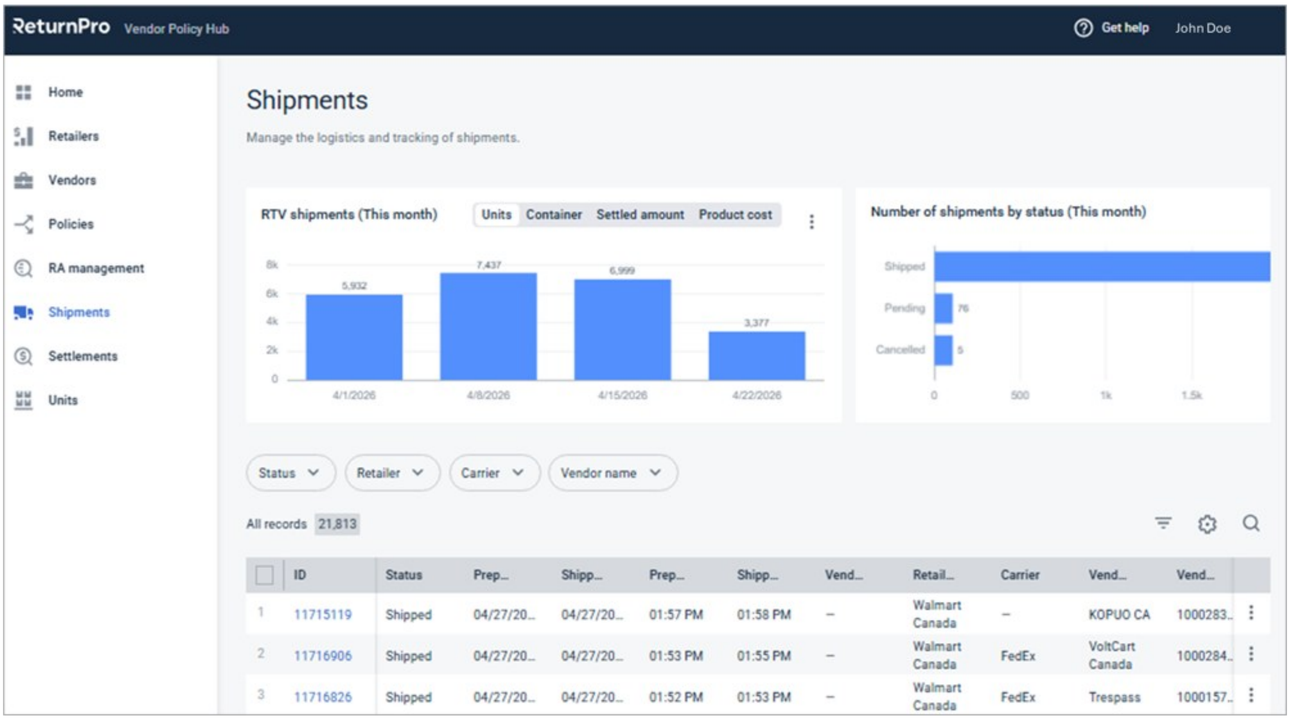
ReturnPro

FIELD	DESCRIPTION
	• **PassThrough:** The return is being routed through the system for tracking/processing purposes, typically without standard return handling (varies by retailer/program configuration).
Settled amount	Displays the total settled amount received for processed returns, calculated as the combined sum of the product cost and any applicable fees (such as restocking or handling fees).
Settlement ID	Internal identifier linking the RA request to its corresponding settlement record.
Settlement number	Reference number for the settlement associated with the return.
Shipment count	Number of shipments associated with the settlement record.
Shipment ID	Identifier for the shipment associated with the RA.
Shipping address	Destination address for shipments associated with the policy. To edit the Shipping address, see the *Update RA Shipping Address* section.
Status	Indicates the current processing state of the RA request. • **Approved**: The RA has been reviewed and approved for processing or settlement. • **Canceled**: The RA was canceled before completion. • **Mix**: The RA contains a combination of approved and rejected units. • **Pending**: The RA is awaiting review or your organization's approval. • **Rejected**: The RA was reviewed but not approved for settlement or shipment.
Time in status	Duration the request has remained in its current status.
Updated on	Displays the date and time when the RA request was most recently updated.
Unit count	Total quantity of units included in the RA request.
Vendor name	Name of your organization associated with the policy.
Vendor number	Unique identifier for your organization.
Vendor preapproval*	Specifies whether your organization's preapproval was required before the unit could be returned or included in a settlement. A "True" value means your organization authorized the return in advance.

Shipments

The **Shipments** page contains a grid with information about products being shipped to your organization. Information on this page is organized into tiles and a grid.

- For more information about available grid commands, such as using grid filters, saving filter presets, configuring grid columns, and saving column presets, refer to the *Grid Actions* section.



Tiles

The following tiles are available on the Shipments page:

- **RTV shipments**: Displays the total number of Return to Vendor (RTV) shipments for a specified time period, with options to view data by units, containers, settled amounts, or product costs.
  - Select **Units**, **Container**, **Settled amount**, or **Product cost** to adjust the type of data that is displayed in the chart.
  - Tiles that display the **More actions** (⋮) icon allow you to adjust the date range for their metrics. For more information, see the *Adjusting Tile Date Ranges* section.
- **Number of shipments by status**: Displays the total count of shipments categorized by their current status, including:
  - **Shipped**: Products that have left a ReturnPro logistics center.

ReturnPro

Grid

See the table below for more information related to the fields in the Shipments grid.

- Fields are listed in alphabetical order for readability and may not match the order or visibility settings in the system.
- ***Denotes fields that are hidden by default. To display these fields, click the **Table Settings** ( ) icon, select **Configure columns**, check the box next to the desired field, and click **Apply**. For more information about using the commands on this page, refer to the *Commands* section.
- ****Denotes fields that are only visible after selecting the **ID**.

FIELD	DESCRIPTION
Carrier	Name of the carrier used for return shipment (e.g., FedEx, UPS, USPS).
Container ID**	Unique identifier for each pallet, gaylord, or bin in this shipment.
Created on*	Date the shipment was created in the system.
Current disposition**	Latest assigned disposition for the returned product.
Dimension**	Length, width, and height of the pallet.
Facility address	Physical address of the facility.
Facility	Name of the facility from which the shipment is sent.
[Shipment] ID	Unique identifier for each RTV shipment. • **Note:** Clicking this number will display a vertical view of the fields in the grid.
Inventory	Quantity of pallets and items included in the shipment.
Location**	City and state of the facility that has this product.
Prepared date	Date on which the shipment was prepared.
Prepared time	Time at which the shipment was prepared.
Pro #* / Pro number**	Unique tracking number assigned to a freight shipment by the carrier, used to identify and track the shipment throughout its journey.
Product cost**	Combined product cost of all return units associated with the retailer for your products.
[Unit] ID**	Unique identifier assigned to the product.

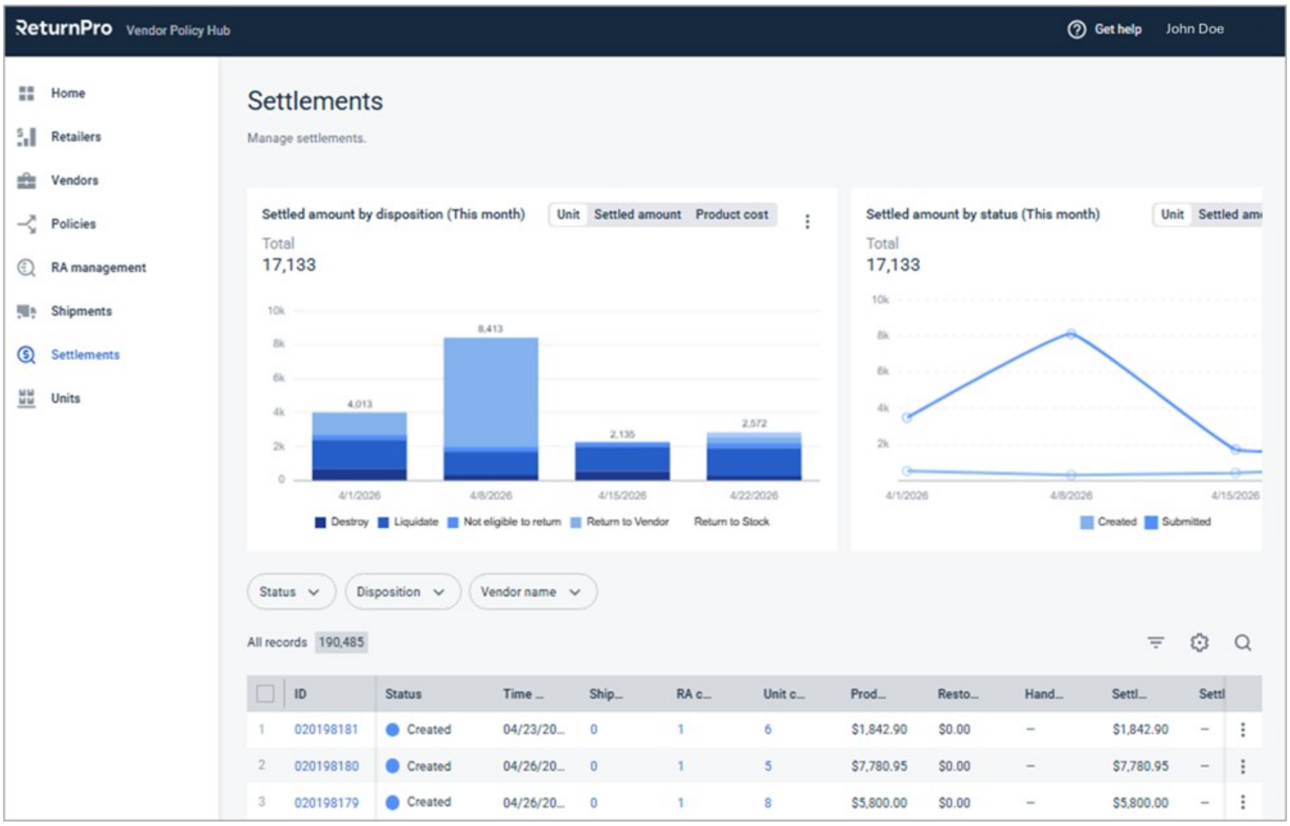
FIELD	DESCRIPTION
RA number*	A unique identifier assigned to a return request used to authorize and track the return through processing and resolution.
RA request ID*	A unique identifier assigned to each RA request.
RA request count**	Number of RA requests submitted for your products by the retailer. • **Note:** Clicking this number opens the *RA management* page, where you can view additional information about each RA. For more information, see the *RA Management* section.
Retailer	A business or individual that sells goods to consumers. Retailers purchase products from vendors or wholesalers to sell them in stores or online.
RWMS ID**	Internal ReturnPro Warehouse Management System (RWMS) identifier assigned to each shipment.
SCAC*	(Standard Carrier Alpha Code) – A unique two-to-four-letter code assigned by the National Motor Freight Traffic Association (NMFTA) to identify freight carriers in the United States.
Settlement count*	Number of settlements issued for returned products processed for the retailer. • **Note:** Clicking this number opens the *Settlements* page, where you can view additional information about each settlement. For more information, see the *Settlements* section.
Settlement ID*	Internal identifier linking the RA request to its corresponding settlement record.
Settlement number*	Reference number for the settlement associated with the return.
Shipped date	Date when the products related to this settlement were shipped to your organization.
Shipped time	Time at which the shipment was shipped and closed.
Shipping address	Destination address for shipments associated with the policy. To edit the Shipping address, see the *Update RA Shipping Address* section.
Status	Indicates the current state of the shipment, where: • **Shipped:** Products that have left a ReturnPro logistics center.
Title**	Name or description of the product being returned.
Tracking number*	Displays the parcel shipment tracking number for parcel shipments or the PRO number for freight shipments.
Unit count**	Number of units included in the invoice or settlement.

FIELD	DESCRIPTION
UPC**	(Universal Product Code) – Unique 12-digit barcode used to identify the product being returned.
Vendor name	Name of your organization associated with the policy.
Vendor number	Unique identifier for your organization.
Vendor phone number	Contact phone number for the vendor.
Weight**	Weight of the pallet in pounds (lbs).

Settlements

The **Settlements** page provides an overview of transactions related to returns for **your products**, including issued and pending invoices. Information on this page is organized into tiles and a grid.

- For more information about available grid commands, such as using grid filters, saving filter presets, configuring grid columns, and saving column presets, refer to the *Grid Actions* section.



Tiles

The following tiles are available on the Settlements page:

- **Settled amount by disposition**: Shows total invoice amounts by disposition with options to view data as units, settled amounts, or product costs over a specified period.
  - Tiles that display the **More actions** (⋮) icon allow you to adjust the date range for their metrics. For more information, see the *Adjusting Tile Date Ranges* section.
- **Settled amount by status:** Displays the total invoice amounts over time, categorized by their status, with options to view data in terms of units, settled amounts, or product costs. Statuses include:
  - **Created**: Indicates invoices that have been generated but not yet finalized or processed.
  - **Cancelled**: Represents invoices that were voided or withdrawn before completion.
  - **Closed**: Refers to invoices that have been fully processed, settled, and completed.

  - **Disputed:** Indicates invoices that are on hold due to a vendor dispute and require resolution before settlement can proceed.
  - **Pending Cancellation:** Represents invoices awaiting receipt of refusal units or manual cancellation due to exceptions or special review.

Grid

See the table below for more information related to the fields in the Settlements grid.

- Fields are listed in alphabetical order for readability and may not match the order or visibility settings in the system.
- *Denotes fields that are hidden by default. To display these fields, click the **Table Settings** ( ) icon, select **Configure columns**, check the box next to the desired field, and click **Apply**. For more information about using the commands on this page, refer to the *Commands* section.
- **Denotes fields that are only visible after selecting the **ID**.

FIELD	DESCRIPTION
Calculation*	Displays the calculation method or formula used to determine the settled amount, including applicable deductions, credits, and fees based on policy settings.
Cancellation reason	Explains why the RA was canceled, if applicable.
Claim ID	Identifier linking the settlement to a specific claim record for tracking and auditing purposes.
Disposition	The final decision on how a returned product will be operationally handled after it has been received, namely: • **Return to Vendor (RTV):** The product will be sent back to the vendor based on the vendor's return policy. • **Research**: The unit is routed for review when no matching policy can be found. • **Not eligible for return:** The product is not approved for physical return. This occurs when a virtual return is rejected or when pre-approval is denied, meaning the unit will never be received at a ReturnPro facility. • **Liquidate:** The product is routed to liquidation channels. • **Destroy:** The product cannot be returned or resold and is designated for disposal based on compliance or condition criteria.
Date created	Date when the settlement record was created in the system.
Disputed date	Date on which the vendor formally disputed the settlement or deduction.
	Explanation or category describing why the vendor disputed the settlement. Options include: • **Altered Item:** The item was modified or tampered with before return. • **Condition Issue:** The returned item's condition did not match the expected return

FIELD	DESCRIPTION
Dispute reason**	condition. • **Counterfeit Item:** The item was identified as inauthentic or counterfeit. • **Extra Items:** Additional items were included in the return that were not part of the original shipment. • **Label Error:** Incorrect or missing labeling on the item or packaging. • **Missing Components:** Required accessories or parts were missing from the return. • **Missing Items*:** One or more expected items were not received. • **Packaging Issue:** The item was improperly or insufficiently packaged for return. • **PO Mismatch*:** The purchase order number did not match the returned item details. • **Serial Mismatch*:** The serial number on the returned item did not match system records. • **Wrong Vendor*:** The returned item was attributed to the incorrect vendor. *****Selecting **Missing Items**, **PO Mismatch**, **Serial Mismatch**, or **Wrong Vendor** will initiate the refusal process. When selected, ReturnPro expects the refusal units to be shipped back by the vendor (excluding Missing Items, where no physical return is required).
EDC**	Electronic Data Capture reference used for tracking digital transaction or remittance data between systems.
Eligibility type	Indicates whether the unit or product qualifies for invoicing, replacement, or credit based on the governing policy rules. Options include: • **Credit:** The product qualifies for a financial credit to the vendor. • **Replace:** The product qualifies for replacement rather than credit.
Facility	Name of the facility from which the shipment is sent.
Fees**	Total amount of fees calculated according to the applicable policy rules, such as handling, restocking, or processing charges.
GRN**	Goods Received Note reference that confirms receipt of returned items at the processing facility.
Handling fee	A charge imposed by the retailer, when applicable, to cover the operational costs associated with processing and shipping returned items.

[Settlement] ID	Unique identifier for each invoice generated within the settlement module.
	• **Note**: Clicking this number will display a vertical view of the fields in the grid, organized into the following sections:
	  ◦ **Overview:** Displays general settlement details such as settlement number, status, vendor, retailer, and relevant dates (e.g., created, updated, or shipped).
	  ◦ **Calculation:** Shows the detailed financial breakdown of the settlement, including product costs, fees, adjustments, and the final settled amount.
	  ◦ **Units:** Lists each unit included in the settlement, with corresponding product identifiers (e.g., Unit ID, SKU, Serial Number), quantity, and disposition details.

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FIELD	DESCRIPTION
[Unit] ID**	Unique identifier assigned to the product.
Inventory type	Indicates the classification of the product. Options include: • **Physical:** Tangible inventory such as hardware or accessories. • **Virtual:** Intangible goods such as software licenses or activation codes.
Internal notes	Displays any internal or system-generated comments related to the settlement or deduction.
Paid amount	Amount that has been paid to your organization for the settlement after all applicable deductions or adjustments.
Paid date	Date on which payment was issued to your organization for the settlement.
Payment source**	Identifies the origin of the payment (e.g., ACH transfer, manual adjustment, or system batch payment).
Payment status	Indicates whether payment for the settlement is in progress or complete. Options include: • **Paid:** The settlement amount has been fully paid to the vendor. • **Pending Payment:** Payment has been issued but is not yet complete. • **Partially Paid:** A portion of the settlement amount has been paid to the vendor.
Product cost	Combined product cost of all return units associated with the retailer for your products.
Primary identifier**	Internal system key used to uniquely identify and link the settlement across integrated modules (e.g., RA, Shipment, Policy).
Purchase order	Purchase order number related to the returned product or shipment.
Unit count**	Number of units included in the invoice or settlement.
RA count	Total number of RA associated with the settlement.
RA ID	Unique identifier assigned to the RA record linked to the settlement.
RA number	A unique identifier assigned to a return request used to authorize and track the return through processing and resolution.
Refusal received date**	Date when the retailer or processing facility received the refused return unit, confirming physical receipt from your organization.
Response due date	Date by which your organization must respond to the RA request.
Restocking fee	Fee charged by the retailer, when applicable, to cover the costs associated with reintegrating returned products into inventory.
Retailer* /	

ReturnPro

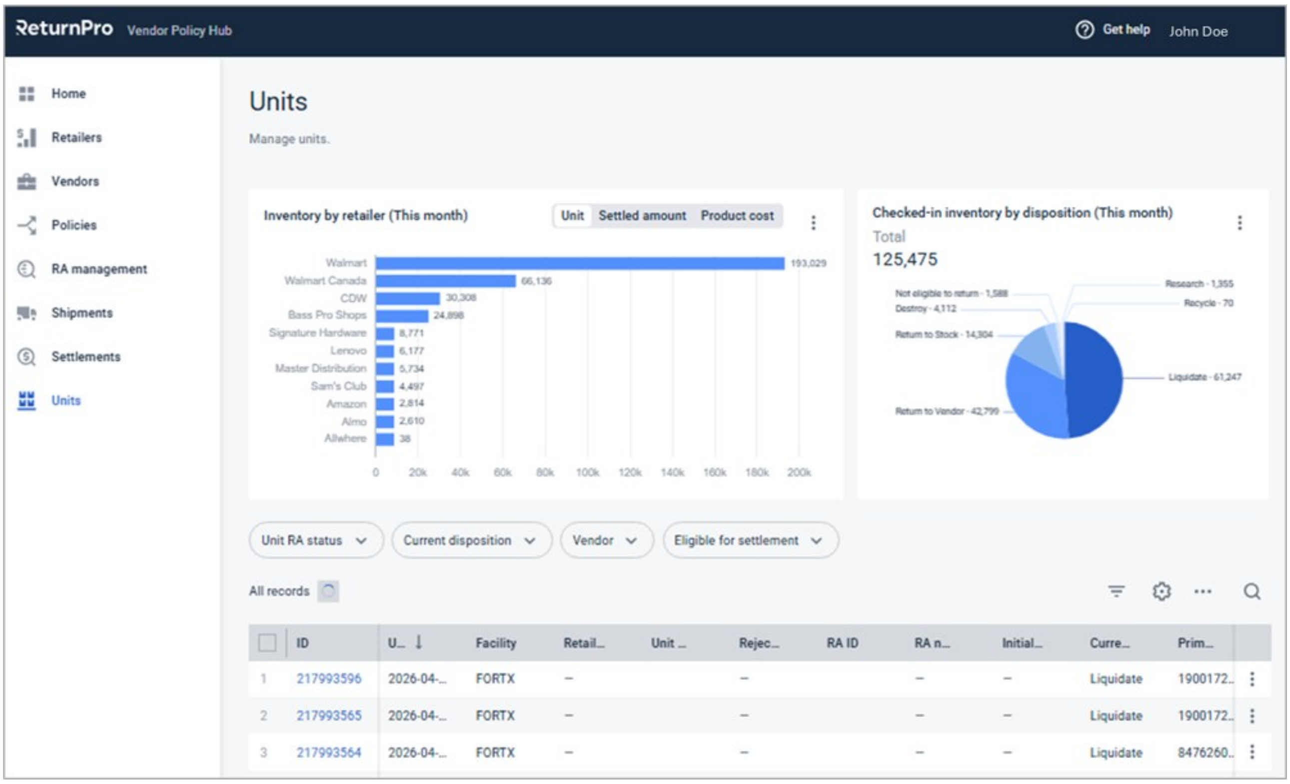
FIELD	DESCRIPTION
Retailer name	Name of the retailer your organization works with, as registered in the system.
Serial number**	Manufacturer-issued unique identifier of the unit, typically used for authentication and warranty tracking.
Settled amount	Displays the total settled amount received for processed returns, calculated as the combined sum of the product cost and any applicable fees (such as restocking or handling fees).
Settlement number	Reference number for the settlement associated with the return.
Settlement status**	Indicates the current status of the settlement within the processing workflow. Options include: ◦ **Created**: Indicates invoices that have been generated but not yet finalized or processed. ◦ **Cancelled**: Represents invoices that were voided or withdrawn before completion. ◦ **Closed**: Refers to invoices that have been fully processed, settled, and completed. ◦ **Disputed:** Indicates invoices that are on hold due to a vendor dispute and require resolution before settlement can proceed. ◦ **Pending Cancellation:** Represents invoices awaiting receipt of refusal units or manual cancellation due to exceptions or special review.
Shipment count	Number of shipments associated with the settlement record.
Shipped date	Date when the products related to this settlement were shipped to your organization.
Shipment ID	Identifier for the shipment associated with the RA.
[Unit] Status**	Indicates the current status of the unit(s) included in the settlement. Options include: • **Approved:** The unit has been approved for settlement without changes. • **Approved with Adjustments:** The unit has been approved but includes modifications (e.g., fee or quantity changes). • **Pending Refusal:** Awaiting confirmation of your organization's refusal of the return. • **Pending Review:** The unit is under review for validation or approval. • **Refused:** The vendor has rejected the settlement or return.
Time frame	Displays the period covered by the settlement, typically aligning with billing or reporting cycles.
Title**	Name or description of the product being returned.
Unit count	Total number of individual units included in the invoice or settlement.
Updated on	Date and time when the settlement record was last modified in the system.
Vendor contact name	Name of the contact at your organization responsible for settlement-related communication.

FIELD	DESCRIPTION
Vendor email	Email address of the contact at your organization associated with the settlement.
Vendor ID**	Unique internal identifier assigned to your organization within the system.
Vendor name	Name of your organization associated with the policy.
Vendor number	Unique identifier for your organization.
Vendor return reason**	Explanation provided by the retailer for why the product was returned.

Units

The **Units** page allows vendors to view and track individual units (also referred to as products) associated with their products across RA requests and shipments. This page provides advanced filtering options, download capabilities, and detailed unit history. Information is organized into tiles and a grid.

- For more information about available grid commands, such as using grid filters, saving filter presets, configuring grid columns, and saving column presets, refer to the *Grid Actions* section.



Tiles

The following tiles are available on the Units page:

- **Inventory by retailer**: Displays the total number of return units for your products by retailer for a specified time, with options to view data by **Unit**, **Settled amount**, or **Product cost**.
  - Tiles that display the **More actions** (⋮) icon allow you to adjust the date range for their metrics. For more information, see the *Adjusting Tile Date Ranges* section.
- **Checked-in inventory by disposition**: Displays the number of your return units checked in for a specified time, grouped by disposition.
- **Inventory processed**: Track the total number of items processed, along with the associated product costs and the settled amounts.
- **Inventory by status**: Monitor the monthly changes in inventory status, including:

- **Complete**: Items that have finished the check-in and evaluation process and have been assigned a final disposition.
- **In progress**: Items that are currently moving through the check-in workflow and have not yet been given a final disposition.

Grid

See the table below for more information related to the fields in the Units grid.

- Fields are listed in alphabetical order for readability and may not match the order or visibility settings in the system.
- ***Denotes fields that are hidden by default. To display these fields, click the **Table Settings** ( ) icon, select **Configure columns**, check the box next to the desired field, and click **Apply**. For more information about using the commands on this page, refer to the *Commands* section.
- ****Denotes fields that are only visible after selecting the **ID**.

FIELD	DESCRIPTION
Alternative disposition	Secondary or fallback disposition if the initial disposition cannot be fulfilled.
Approval type	Indicates how the return request will be fulfilled once approved. • **Credit:** The request is approved for financial reimbursement; no replacement product will be sent. • **Replace:** The request is approved for a replacement product rather than a monetary credit.
Claim ID	Identifier linking the settlement to a specific claim record for tracking and auditing purposes.
Condition*	Describes the unit's physical state at intake. Conditions may include: *New, New Damaged Box, Like New, Open Box Like New, Used,* or *Damaged/Missing Parts.* This field may also be blank.
Container ID*	Unique identifier for each pallet, gaylord, or bin in this shipment.
Current disposition	Latest assigned disposition for the returned product.
Product cost	Combined product cost of all return units associated with the retailer for your products.
Damage location*	Indicates where physical damage is present on the unit. • **Examples:** None, Front, Back, Top, Under Side, Left Side, Right Side, Interior, Control Panel.
Damage type*	Describes the type of damage observed. • **Examples**: None, Bowed, Broken Glass, Crease, Chafed, Chipped, Damaged Plastic, Damage to Tub, Dented, Missing Parts, Panel/Misalignment, Punctured, Scratched

FIELD	DESCRIPTION
Date created*	Date the unit was entered into the system.
Eligible for settlement	Indicates whether the unit qualifies to be included in a financial settlement associated with your organization. Units marked “No” are excluded from settlement calculations.
Estimated handling fee*	Dollar amount assigned by the retailer, when applicable, during check-in to cover anticipated processing costs. This value is typically calculated as a percentage of the *Product cost* (e.g., 4%) and is sent with the initial notification. It is for reference only and may differ from the final handling fee applied at settlement.
Estimated restocking fee*	Displays the projected restocking fee, when applicable, for the unit prior to final settlement. This value is calculated according to policy rules and may differ from the actual charged fee after reconciliation.
Estimated settled amount*	Estimated total settlement value (**Product cost** + **estimated fees**), calculated after check-in. This may differ from the final settled amount. • For more information about estimated fees, see the vendor/retailer policy.
Facility	Name of the facility from which the shipment is sent.
Handling fee*	A charge imposed by the retailer, when applicable, to cover the operational costs associated with processing and shipping returned items.
Hazmat*	Identifies whether the unit is classified as a hazardous material. Units containing components like batteries are marked as Hazmat.

ID	Unique identifier for each unit. Clicking this opens the Unit panel, which displays a vertical view of certain fields in this grid grouped into the following sections:
	
	• **General**: Shows basic identifying information for the unit, such as its title, catalog product ID, assigned program, and inventory type.
	• **Product photos**: Displays any images associated with the unit, often added during check-in or inspection. These may help confirm the unit’s appearance or condition.
	• **Condition**: Provides details about the unit’s physical condition, including:
	    ◦ Packaging presence (e.g., original packaging)
	    ◦ Physical grading (e.g., Grade A, B, etc.)
	    ◦ Damage location and type, if applicable
	• **RA data**: Lists details related to the RA process. This includes the unit’s RA ID, RA number, RA request status, return reason, and rejection reason (if applicable).
	• **Shipment**: Displays shipment-related data such as shipment ID, shipping status, tracking number, and associated shipping or logistics information.
	• **Warehouse**: Shows facility-related details including the processing facility name, city, and sorting category (when applicable).
	• **Vendor**: Includes information about your organization associated with the unit, such as vendor name, vendor number, and any applicable retailer vendor ID.
	• **Settlement**: Displays financial and policy-related data, including settled amounts, handling fees, settlement IDs, and eligibility status based on policy terms.

FIELD	DESCRIPTION
	• **Other**: Includes supplemental system and catalog data, such as how the unit was sourced (e.g., via upload or facility check-in), unit identifiers, and manufacturer SKU. **Note**: Section visibility may vary based on user permissions.
Initial disposition	The original disposition assigned when the return was first created.
Inventory type*	Indicates the classification of the product. Options include: • **Physical:** Tangible inventory such as hardware or accessories. • **Virtual:** Intangible goods such as software licenses or activation codes.
Is voided*	Indicates whether the unit has been canceled and removed from further processing (e.g., if a duplicate entry was created by mistake). Voided units do not generate RA requests in the Vendor Policy Hub.
Last executed by**	Identifies the user or automated system process that last updated or executed an action on the unit (e.g., status change, settlement recalculation).
Last process*	Last physical process a unit went through (e.g., check-in, testing, sorting).
Location**	City and state of the facility that has this product.
Manufacturer code	Code assigned by the manufacturer identifying the product's brand or production source.
Manufacturer SKU	Unit identifier from the retailer's catalog.
Model*	Unit model number pulled from the retailer's catalog.
Original packaging*	Indicates whether the unit's original packaging is present (Yes/No).
Physical condition*	Grading of the item's physical state: *Brand New, Grade A–D.*
Policy ID*	Identifies the specific return policy governing how the RA request is reviewed and processed. • **Note:** Clicking this number opens the *Policies* page, where you can view details such as eligibility rules, fulfillment type, and disposition outcomes.
Primary identifier	Internal system key used to uniquely identify and link the settlement across integrated modules (e.g., RA, Shipment, Policy).
Primary identifier type*	Defines the format of the identifier: UPC, RIN, ISBN, etc.
Product	Unique system identifier for the product's template or master listing used to group similar SKUs

FIELD	DESCRIPTION
template ID*	or configurations.
Program*	Name of the return program the unit is part of.
Purchase order number*	Original purchase order number associated with the unit for your organization.
RA ID	Unique identifier assigned to the RA record linked to the settlement.
RA number	A unique identifier assigned to a return request used to authorize and track the return through processing and resolution.
RA request status*	Current status of the RA request associated with the unit.
RA type*	RA type assigned to the associated RA request, based on policy. • **Blanket RA:** Units returned under a standing agreement without prior approval. • **Call for RA:** Requires your organization's approval before return. • **No RA required:** Unit can be returned without initiating an RA request.
Reject reason	Provides a reason if the unit's RA request was rejected. • **Negotiation pending:** The request is under discussion between retailer and your organization. • **Did not follow policy:** The request does not meet the governing policy requirements. • **Did not capture necessary information:** Key details required for processing were missing. • **Over timeframe allowed:** The request was submitted past the allowable time window. • **Keep in store:** The unit should remain with the retailer and will not be returned. • **Destroy in field:** The unit should be destroyed on-site rather than shipped back. • **Not my product:** Indicates that your organization determined the item does not belong to them. • **Other: Specify a reason:** A custom rejection reason entered manually by the reviewer.
Restocking fee*	Fee charged by the retailer, when applicable, to cover the costs associated with reintegrating returned products into inventory.
Retailer	Name of the retailer your organization works with, as registered in the system.
Return Pro ID*	Internal ReturnPro identifier for the unit, used to track the item through its full return lifecycle.
	Stated reason the customer provided for the return. • **Arrived later than expected:** Item did not arrive within the expected delivery timeframe. • **Bought by mistake:** Customer ordered the wrong item unintentionally. • **Changed mind:** Customer no longer wants the item, with no issue related to product performance.

ReturnPro

FIELD	DESCRIPTION
Return reason	• **Chargeback:** Return associated with a payment dispute raised through the financial institution. • **Customer service issue:** Return due to dissatisfaction with support or service experience. • **Customer will not pay invoice:** Customer has refused or is unable to pay for the invoiced item. • **Defective or doesn't work:** Item arrived damaged, malfunctioning, or failed to operate as intended. • **Demo:** Unit was used for demonstration or evaluation purposes and is being returned. • **Extra item sent:** Customer received more units than ordered. • **License / Warranty Return:** Return related to software licensing issues or a warranty claim. • **Lost shipment found:** Item previously reported missing has been located and is now being returned. • **Not as described:** Product received does not match listing details, specifications, or expectations. • **Not configured correctly:** Product was misconfigured or improperly set up and is being returned. • **Ordered too many:** Customer ordered a greater quantity than needed. • **Package arrived damaged:** Packaging and/or product arrived visibly damaged. • **Passthrough credit return:** Credit is being issued directly from the vendor to the customer. • **Refused at door:** Customer refused to accept delivery upon arrival. • **Refused by Carrier (non-deliverable):** Carrier could not complete delivery, and the package was returned. • **Request to reroute shipment:** Item sent to the wrong address or needs redirecting to a different location. • **Shipping label issue:** Incorrect or invalid return label prevented proper shipment. • **Unauthorized return:** Customer returned the item without prior approval or outside policy. • **Wrong item sent:** Customer received an item different from what was ordered.
ReturnPro facility location	City and state of the processing facility.
RWMS ID*	Internal ReturnPro Warehouse Management System (RWMS) identifier assigned to each shipment.
SLP*	Manufacturer-issued serialized license plate of the unit, used for logistics and tracking throughout the return process.
Serial number*	Manufacturer-issued unique identifier of the unit, typically used for authentication and warranty tracking.
Settled amount*	Displays the total settled amount received for processed returns, calculated as the combined sum of the product cost and any applicable fees (such as restocking or handling fees).

FIELD	DESCRIPTION
Settlement ID*	Internal identifier linking the RA request to its corresponding settlement record.
Settlement number	Reference number for the settlement associated with the return.
Settlement payment status*	Indicates whether payment for the settlement is in progress or complete. Options include: • **Paid:** The settlement amount has been fully paid to the vendor. • **Pending Payment:** Payment has been issued but is not yet complete. • **Partially Paid:** A portion of the settlement amount has been paid to the vendor.
Settlement status**	Indicates the current status of the settlement within the processing workflow. Options include: ◦ **Created**: Indicates invoices that have been generated but not yet finalized or processed. ◦ **Cancelled**: Represents invoices that were voided or withdrawn before completion. ◦ **Closed**: Refers to invoices that have been fully processed, settled, and completed. ◦ **Disputed:** Indicates invoices that are on hold due to a vendor dispute and require resolution before settlement can proceed. ◦ **Pending Cancellation:** Represents invoices awaiting receipt of refusal units or manual cancellation due to exceptions or special review.
Settlement unit status**	Indicates the individual status of the unit within the settlement (e.g., Pending review, Approved, Paid, or Disputed). Useful for tracking item-level progress.
Shipment ID*	Identifier for the shipment associated with the RA.
Shipment status**	Shows the shipping stage of the unit (e.g., Prepared, In transit, or Delivered to vendor).
Shipping warehouse*	Unique identifier of the warehouse responsible for shipping the unit.
Sorting category*	Category used during warehouse processing to group the unit or its container for routing and handling purposes.
Sourced by*	Indicates how the unit was added to the system. This helps identify the origin of the data and intake method used.
Technical functionality*	Functional status of the unit: *Assessment Required, Fully Functional, Parts for Repair, Recycle.*
Title*	Name or description of the product being returned.
Time in RA status**	Displays how long a unit has remained in its current RA status.
Tracking number	Displays the parcel shipment tracking number for parcel shipments or the PRO number for freight shipments.
	Status of the unit in the RA process:

FIELD	DESCRIPTION
Unit RA status	• **Ready for RA** – RA request is ready to be created for the unit • **Pending** – RA request has been submitted and is awaiting to be Approved or Rejected • **Approved** – RA request is approved • **Rejected** – RA request is denied • **On Hold** - Applies to virtual returns only. The unit is pending further action or review before the RA can proceed.
Updated on*	Displays the date and time when the RA request was most recently updated.
Vendor	Name of your organization associated with the policy.
Vendor number*	Unique identifier for your organization.
Vendor preapproval*	Specifies whether your organization approved the return in advance before the unit could be returned or included in a settlement. A value of "True" indicates the return was authorized ahead of time.
Vendor return reason	Explanation provided by the retailer for why the product was returned.

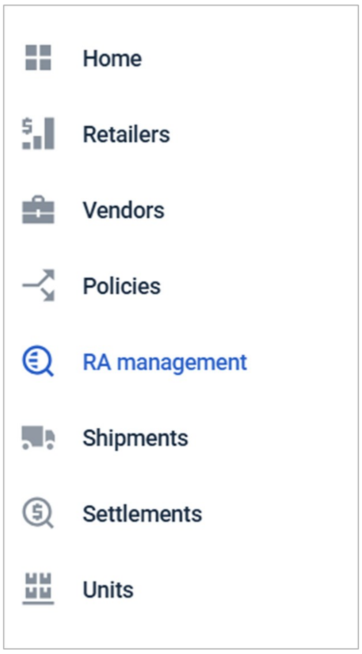
Actions

Return Actions

Approve and Reject RAs

Use **RA management** to review pending Return Authorization (RA) requests and determine whether to approve or reject them.

1. Locate pending RA requests.
    a. From the main menu, select **RA management**.



    b. Review all RAs or apply filters to narrow the list.
        - To view only pending requests, apply the filter **Status > Pending**.

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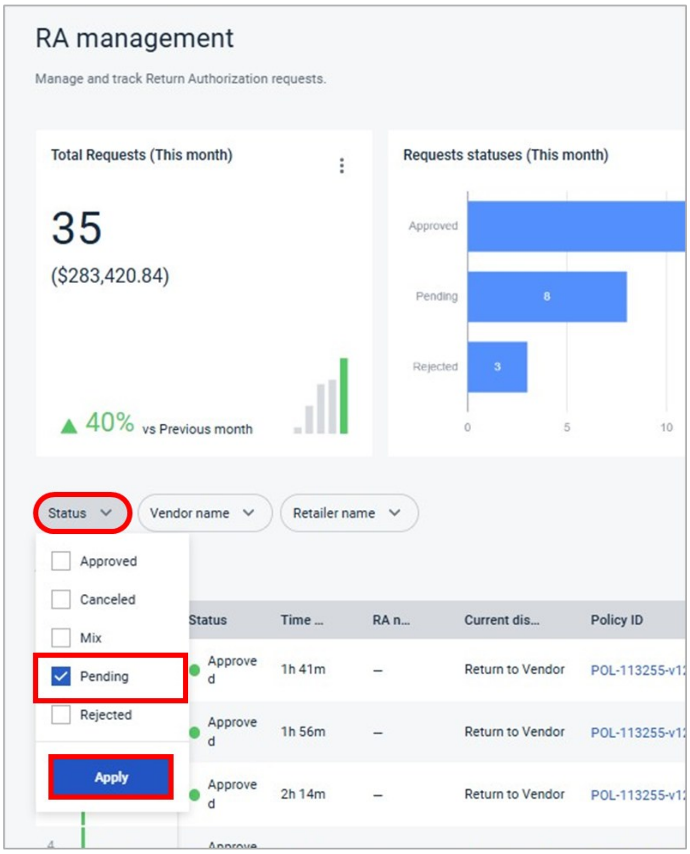
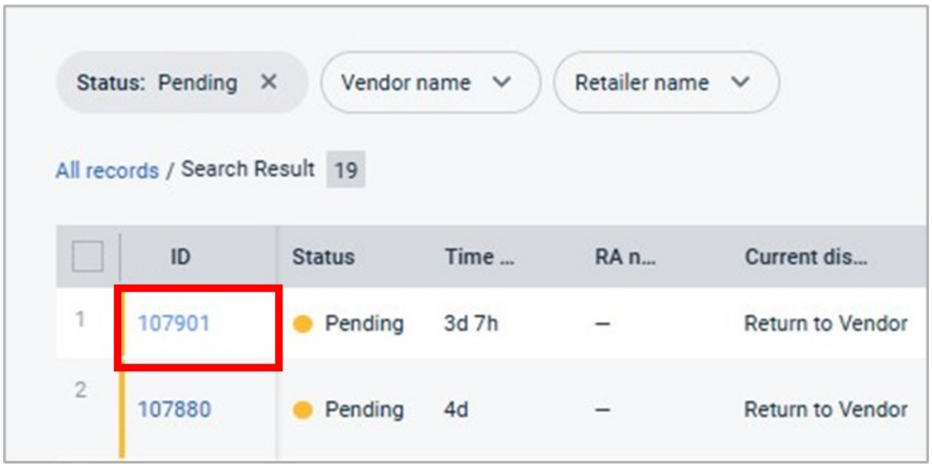
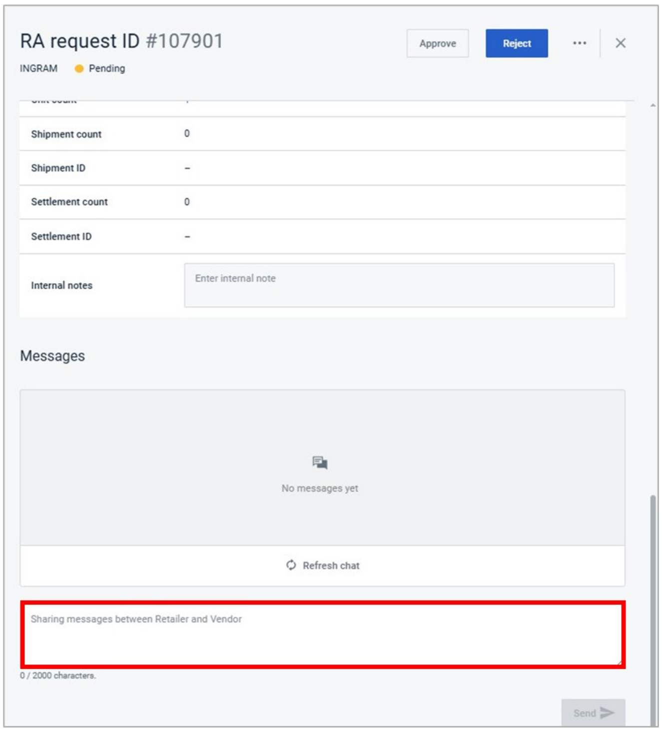


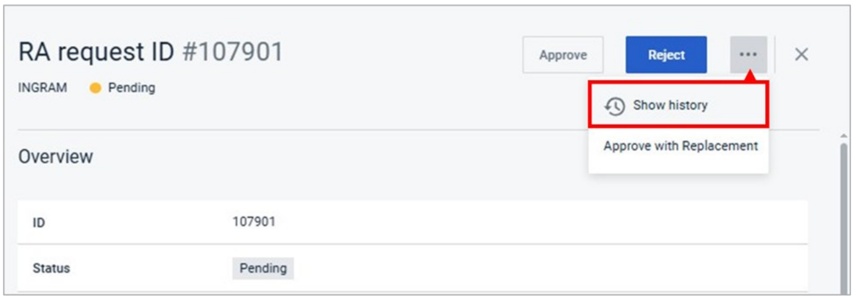
2. Review the details of an RA request.
    a. Select an **ID** to open the RA details panel.



    b. Review the request details and financial breakdown.
        - **Tips**:
            - Use the *Messages* section to ask questions or request clarification, if needed.

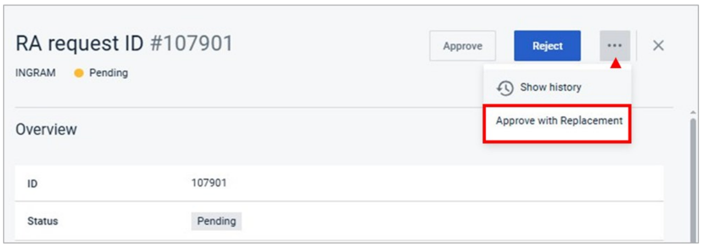


- Select **More actions (...)** > **Show history** to view the audit history for the RA, including past approval and rejections.



3. Approve an RA request.
   a. Select **Approve** from the RA details panel.

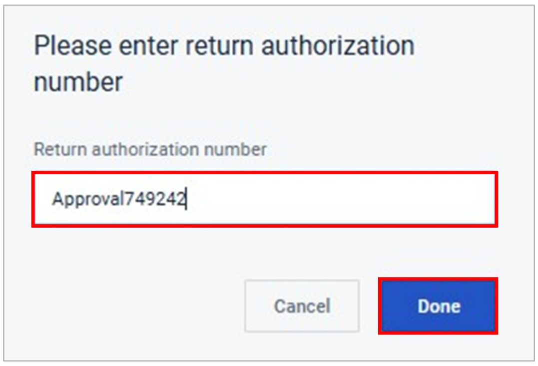
- (Optional) Select **More actions (...)** > **Approve with replacement** if a replacement will be issued instead of a credit.



- **Note:** If you do not want the unit shipped back to your organization, do not approve the return. Instead, request a disposition update (for example, from Return to Vendor to Liquidate or Destroy) by submitting a ticket via **More actions > Report issue / Feedback**, or contact your retailer representative for assistance before taking action on the RA.

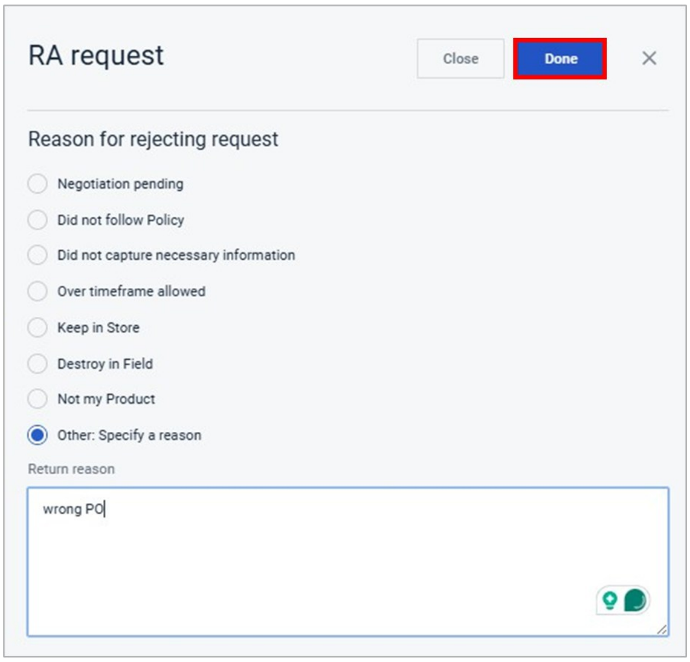
b. Enter the **Return authorization number** when prompted.
   - **Note**: RA numbers must not exceed 15 characters.

c. Select **Done** to confirm approval.

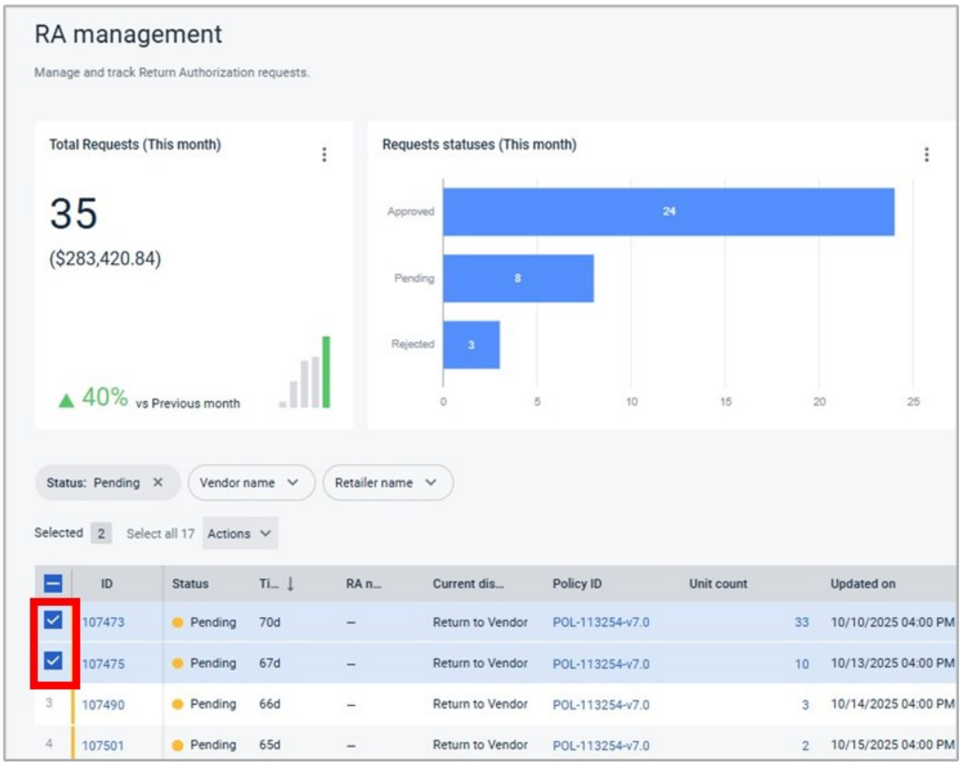


4. Reject an RA request.
   a. Select **Reject** from the RA details panel.

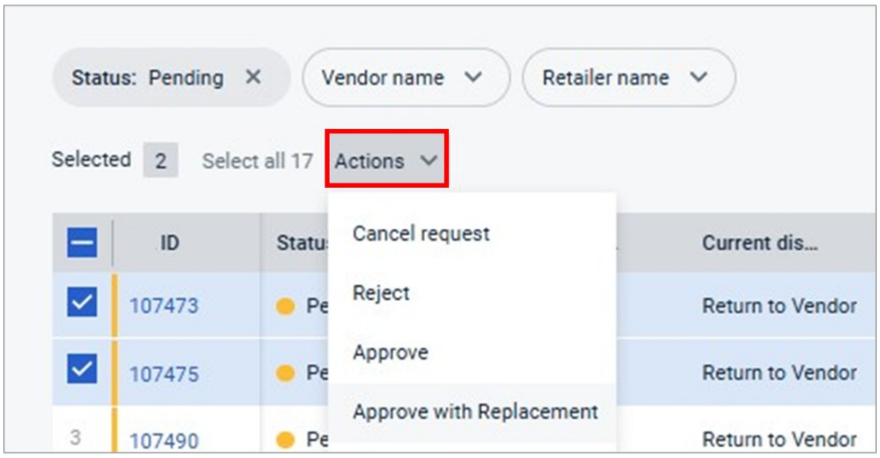
   b. Choose a **rejection reason**, or enter a custom reason if applicable.
   c. Select **Done** to complete the rejection.



5. Approve or reject multiple RA requests at once.
    a. From the **RA management** grid, select one or more RAs.



    b. Select **Actions**, then choose **Approve**, **Approve with Replacement**, or **Reject**.
    c. Complete the required confirmation steps.

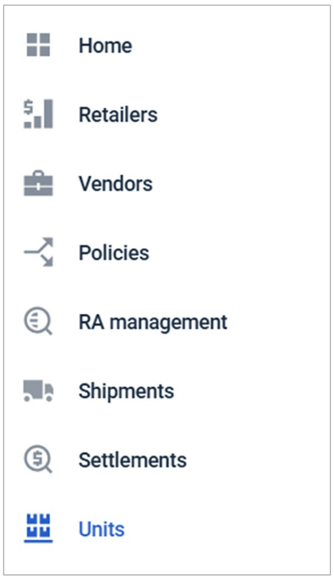


Mix Approval and Rejection for RA Requests

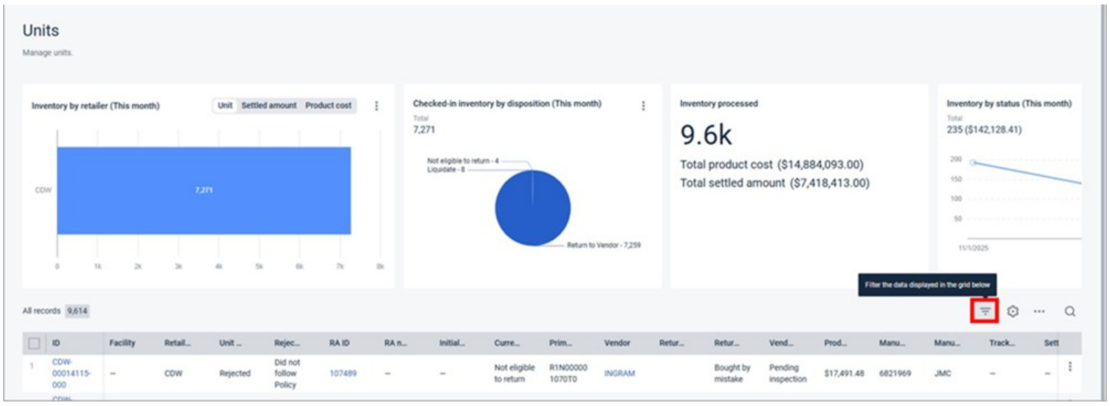
The **Mix Approval and Rejection** process allows users to approve, reject, or approve with replacement for individual units within the same return authorization (RA). This is useful when a single RA includes units requiring different outcomes.

To process mixed approvals and rejections:

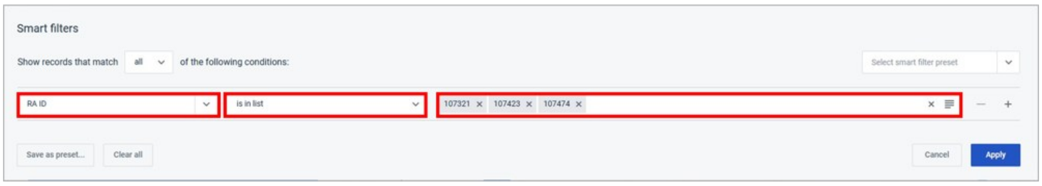
1. From the main menu, select **Units**.



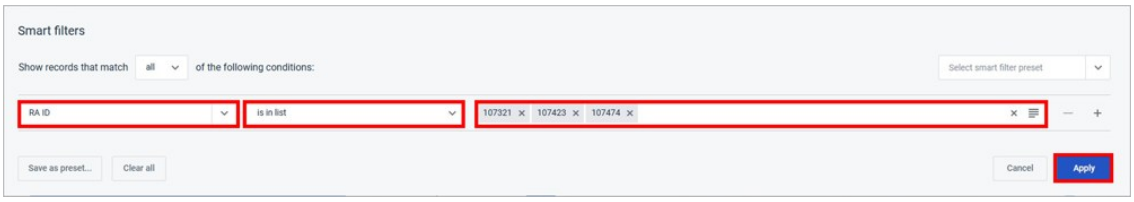
2. Select the **Filter (⩧)** icon to open the **Smart filters** window.



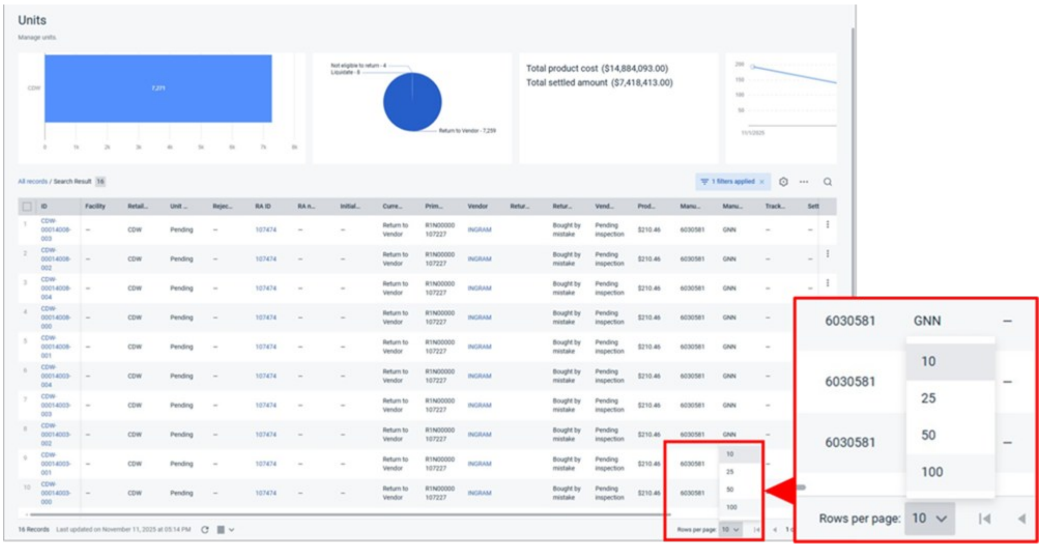
3. Use the following options to locate units tied to a specific RA:
    - In the first box, select **RA ID**.
    - In the second box, select **is in list**.
    - In the third box, enter one or more RA IDs separated by commas.



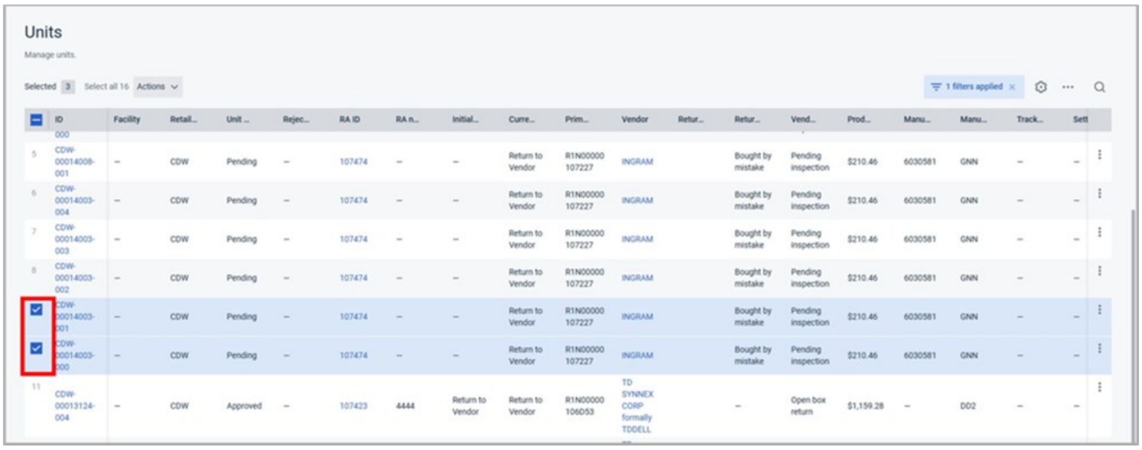
4. Select **Apply** to view results.



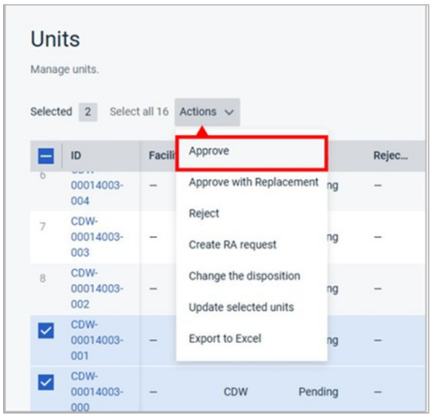
- You can increase the number of records per page to display more than 10 units at a time.

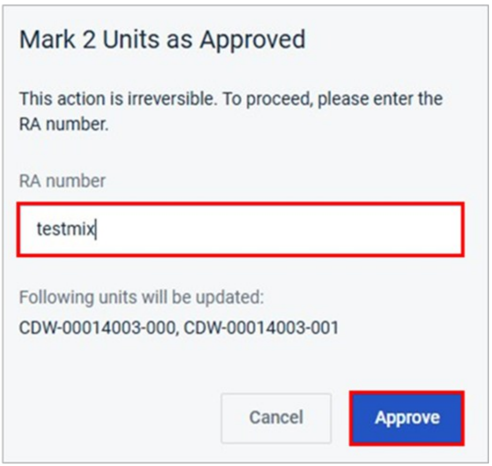


5. Select the checkboxes next to the units you want to process.



6. Select **Actions**, then choose one of the following options:
    - **Approve:** Confirms the unit's return authorization.
        a. Enter the **RA number**.
        b. Select **Approve**.

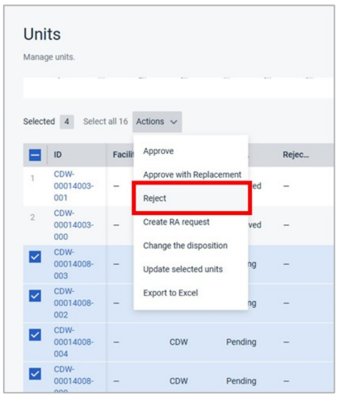


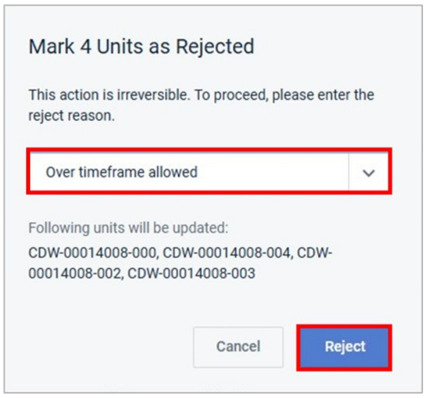


- **Reject:** Denies the unit's return authorization.
    a. Select the appropriate **Reject reason:**
        - **Negotiation pending:** The request is under discussion between the retailer and the vendor.
        - **Did not follow policy:** The request does not meet the governing policy requirements.
        - **Did not capture necessary information:** Key details required for processing were missing.
        - **Over timeframe allowed:** The request was submitted past the allowable time window.
        - **Keep in store:** The unit should remain with the retailer and will not be returned.
        - **Destroy in field:** The unit should be destroyed on-site rather than shipped back.
        - **Not my product:** The vendor determined the item does not belong to them.
        - **Other: Specify a reason:** A custom rejection reason entered manually by the

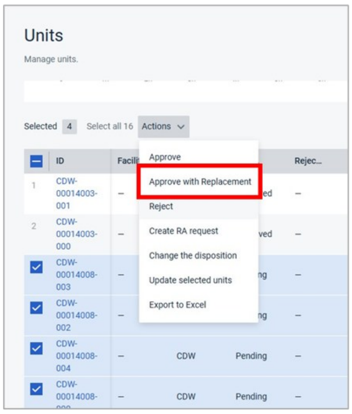
reviewer.

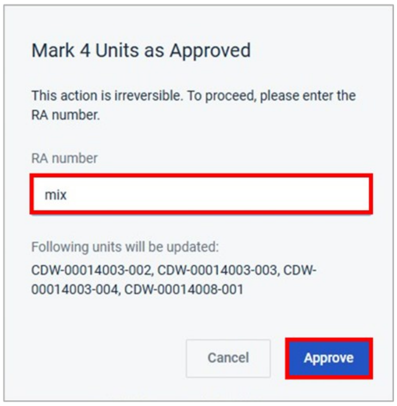
b. Select **Reject**.



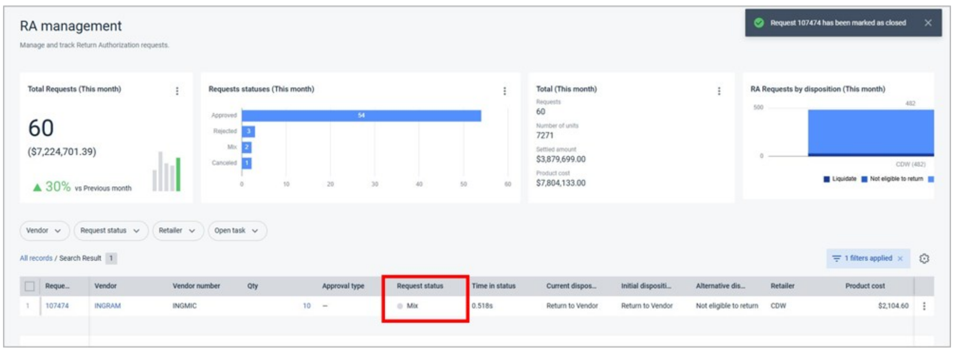


- **Approve with Replacement:** Approves the unit for product replacement instead of a settlement.
    - Enter the **RA number**.
    - Select **Approve**.





7. Repeat steps 5–6 as needed to process different outcomes (approve, reject, approve with replacement) for other units under the same RA.
8. Once complete, the **Request status** updates from *Pending* to *Mix.*
    - **Note**: Once the last unit in the pending RA has a decision, it will be finalized automatically, and the RA status will be updated from Pending to Approved/Rejected/Mixed. No changes will be allowed.

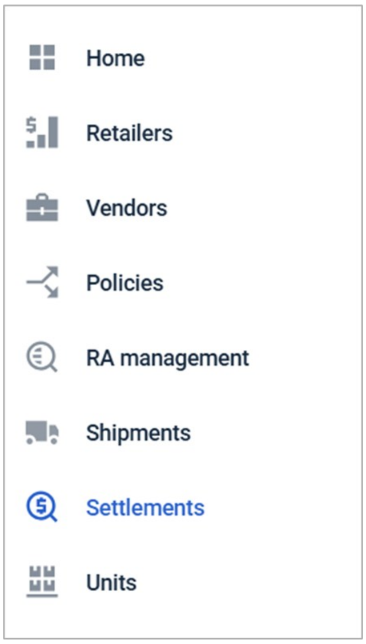


Initiate a Dispute

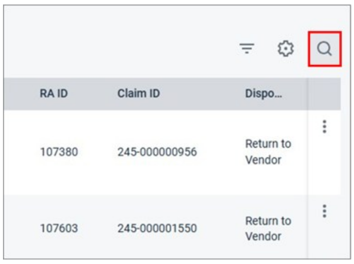
The **Initiate Dispute** action allows users to dispute a settlement directly from the **Settlements** page when discrepancies are identified in fees, item conditions, or applied reasons. Disputes may be initiated at either the **bulk** or **unit** level.

Initiate Disputes for Multiple Units (Bulk)

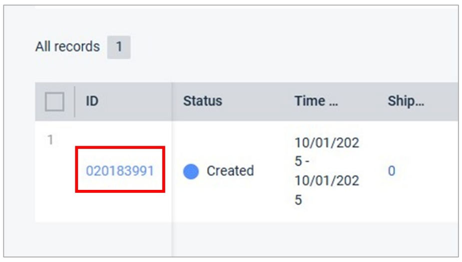
1. From the main menu, select **Settlements**.



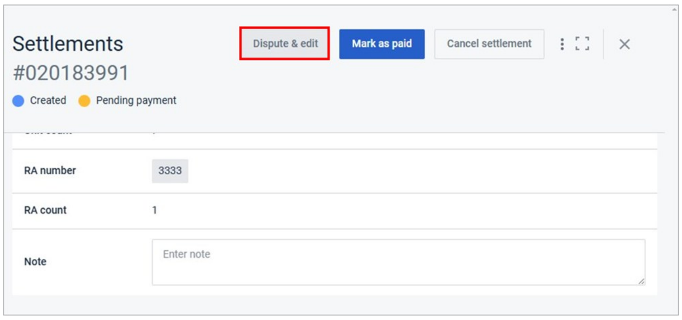
2. Use the search bar to locate the settlement by entering its [**Settlement] ID**.



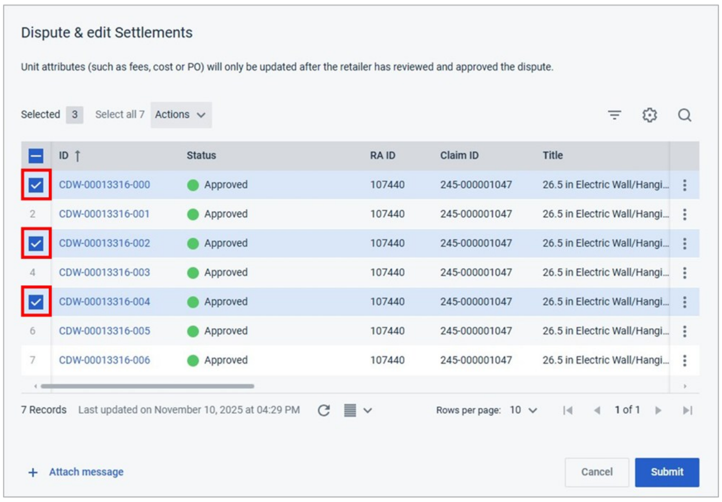
3. Select the [**Settlement] ID** to open the detailed view.



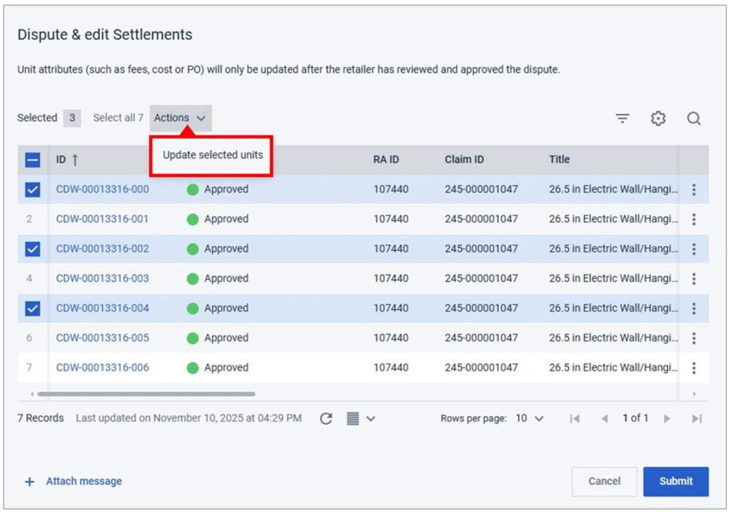
4. Select **Dispute & edit**.



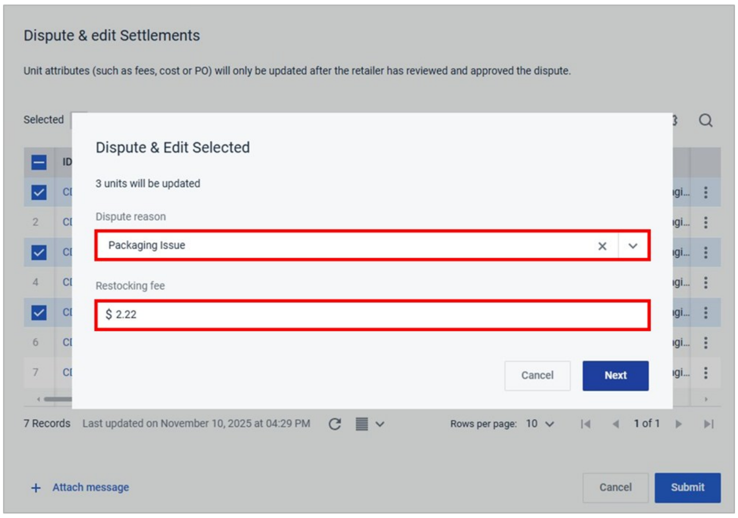
5. Multi-select units that share the same dispute reason and restocking fee (if applicable).



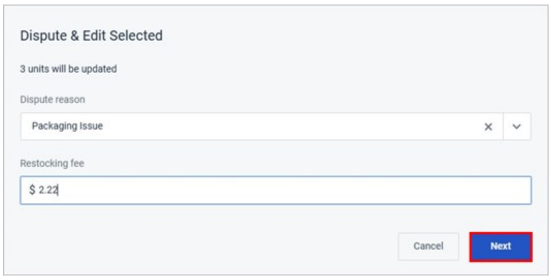
6. Select **Actions**, then choose **Update selected units**.

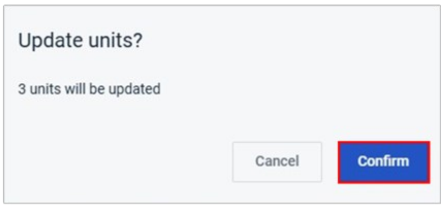


7. Choose the appropriate **Dispute reason** and, if applicable, update the **Restocking fee**.
   - For a list of dispute reasons and descriptions, see the *Settlements* section.



8. Select **Next** and then **Confirm**.





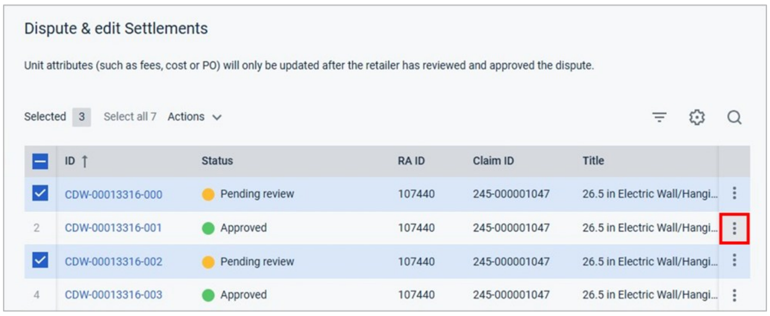
   - *(Optional)* Select **Attach message** to add a comment or note for review, then select **Submit** to finalize.

Once submitted, the **Settlement status** updates to **Disputed**, and the dispute is logged in the system for review and follow-up.

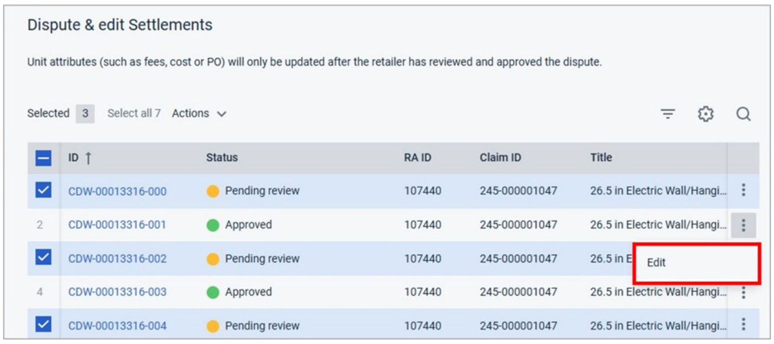
Initiate Single Unit Disputes

Use this option to initiate disputes for single units.

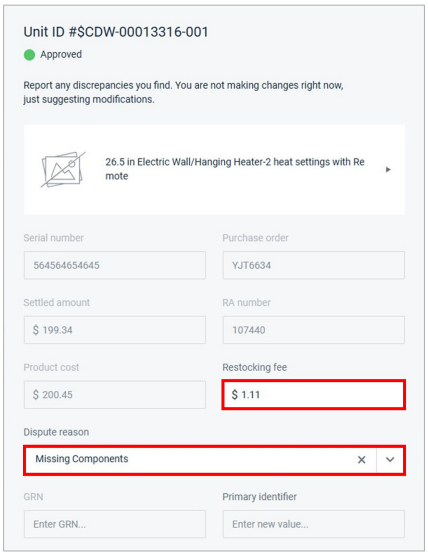
1. In the **Dispute & edit dispute** window for the desired settlement, select **More actions (⋮)** next to the unit you want to review.



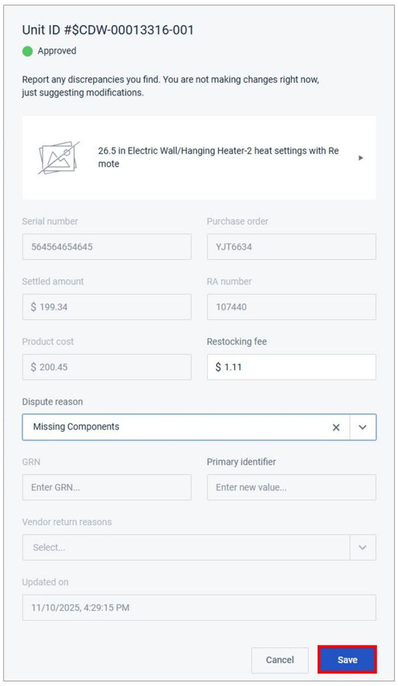
2. Select **Edit**.



3. Choose the appropriate **Dispute reason** and, if applicable, update the **Restocking fee**.
   - For a list of dispute reasons and descriptions, see the *Settlements* section.



4. Select **Save**.

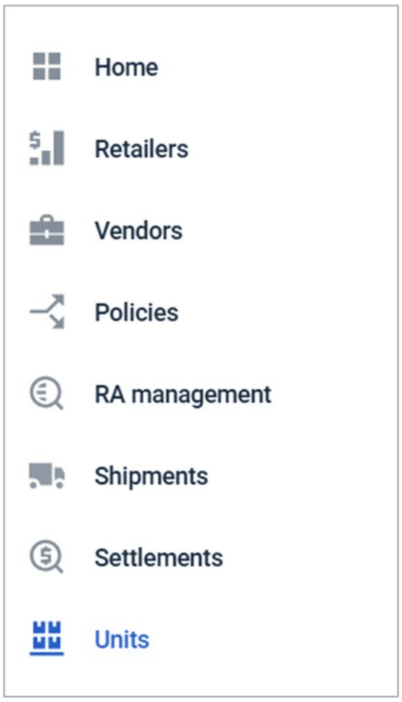


5. (Optional) Select **Attach message** to add a comment or note for review, then click **Submit** to finalize

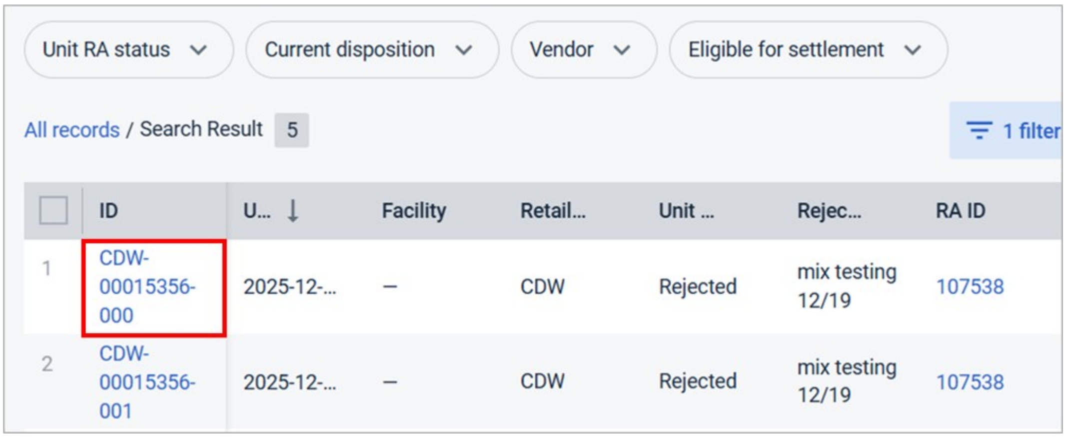
Requesting a PO or Vendor Update

If a PO number or vendor assignment is incorrect, submit a request using the **Report Issue / Feedback** form so ReturnPro can apply the update.

1. From the main menu, select **Units**.



2. Find the unit that needs to be updated.
   - Use filters to find units. For more information about using filters, see the *Using Grid Filters* section.
   - Column order in this SOP may differ from the user's view. For more information about configuring columns, see the *Configuring Grid Columns* section.
3. Confirm the **Settlement ID** for the selected unit is blank.
   - If any columns (e.g., **Settlement ID**) are not visible in the grid, select **Settings** > **Configure columns.** Select the checkbox next to the column name (e.g., **Settlement ID**), and then select **Apply** to unhide it.
   - If the Settlement ID is not blank, this unit is part of a settlement and cannot be modified.
4. Select the **Unit ID** to open the Units panel for this unit.



5. Confirm the changes that are needed.
   - Review the *General* section to confirm the current **Purchase order number** this unit is on.

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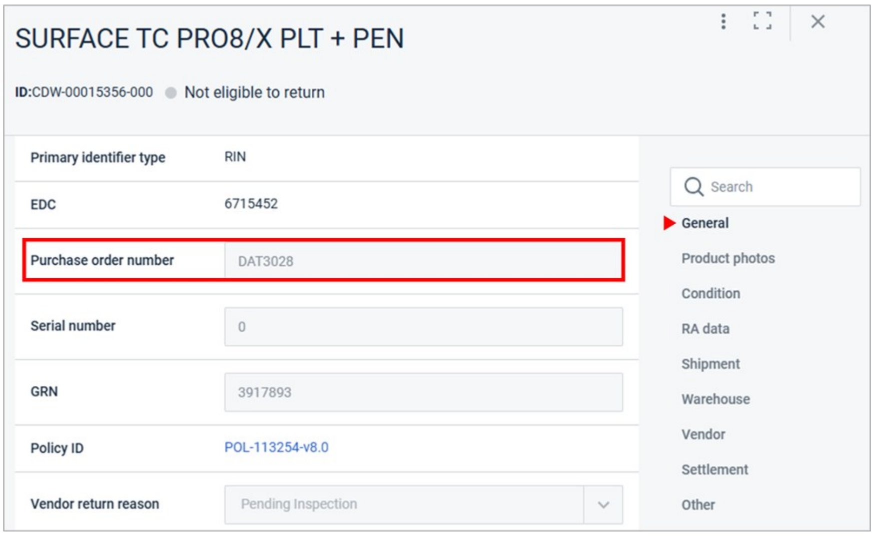
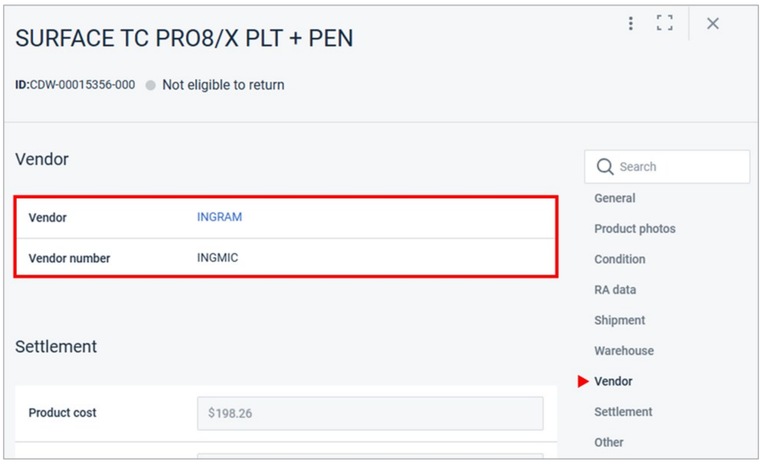


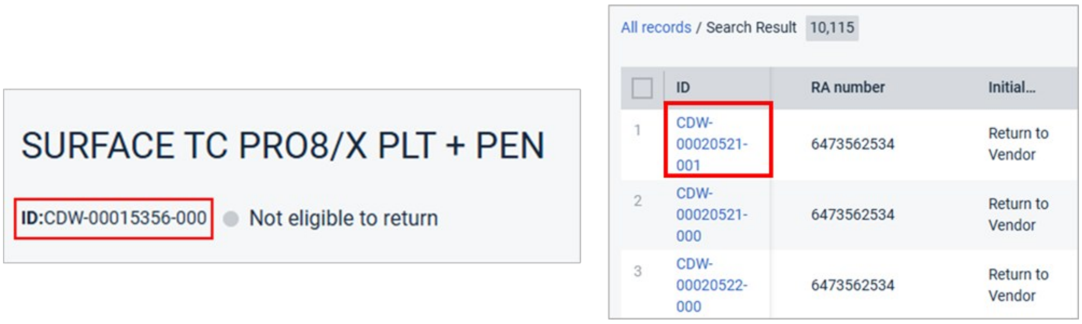
- Review the *Vendor* section to confirm vendor details.



- If PO or vendor changes are needed, proceed to the next step.

6. Copy the unit **ID.**

- The **ID** can be found at the top of the Units panel or in the Units grid.



Units Panel (Left) Units Grid (Right)

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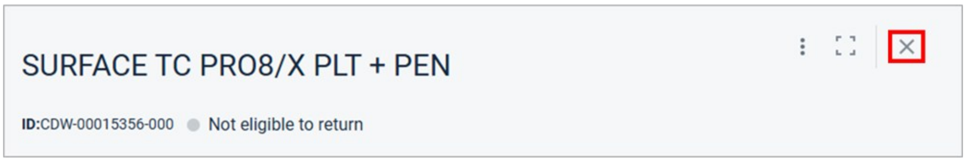
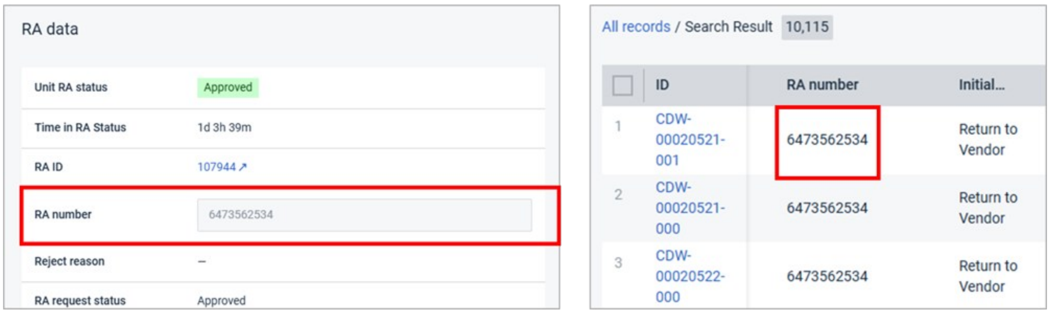
7. Select **X** to close the Units panel.



8. Confirm no other units require updates.
   - If the units are in the same RA (have the same **RA number**), but only some units require updates, copy the **ID** for each individual unit that need to be updated.
   - If the units are in the same RA and all units require updates, copy the **RA number**.
     - The **RA number** can be found in the Units grid or in the *RA data* section of the Units panel.

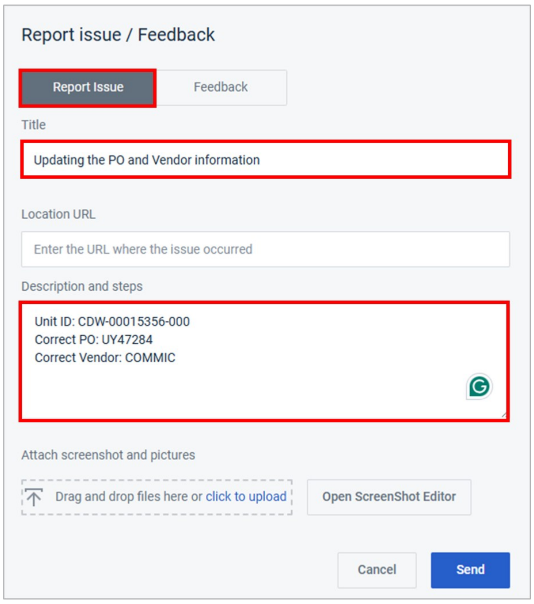


Units Panel (Left) Units Grid (Right)

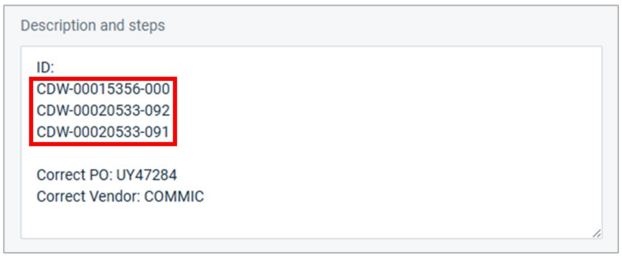
   - If the units are not in the same RA, copy all applicable unit IDs.

9. Select **Get help**.

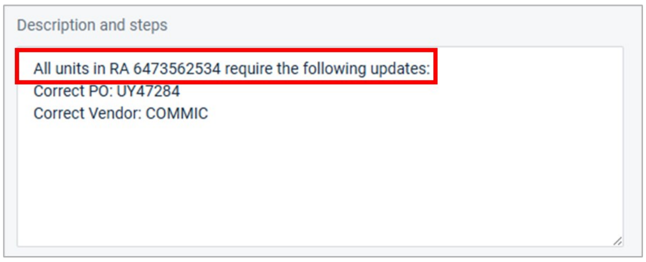
10. Select **Report Issue** (if not already selected), and complete the form as follows:
    - **Title:** Updating the PO and Vendor information
    - **Location URL**: Leave this field empty.
    - **Description and steps:**
      a. Paste the Unit ID.
      b. Enter the correct PO number (if applicable).
      c. Enter the correct vendor information (if applicable).



- If **multiple units require upda**tes: Provide the details based on the following scenarios:
  - If the units are in the **same RA**, but **only some units** require updates, **list the individual Unit IDs** that need to be updated.



  - If all units within the same RA require the same updates, **include the RA number and explicitly state that all units in that RA require the updates** (for example, “All units in RA 6473562534 require the following updates…”).



  - If the units are **not in the same RA**, **list all applicable unit IDs**.
  - If the unit(s) are part of an active RA or settlement, add a note with the request details in the **Messages** section of the RA Management or Settlement detail panel to help ensure the updates are applied consistently.

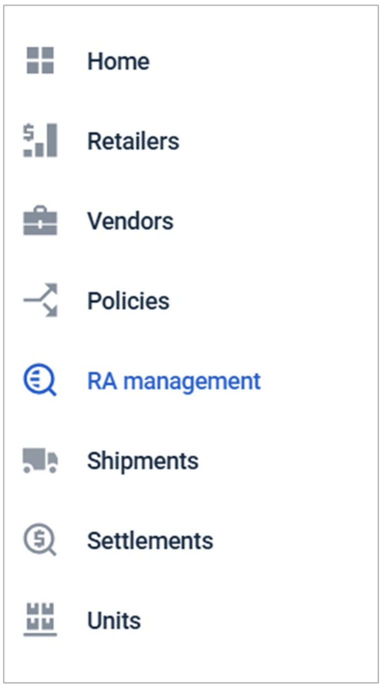
11. Select **Send** to submit the request.

ReturnPro

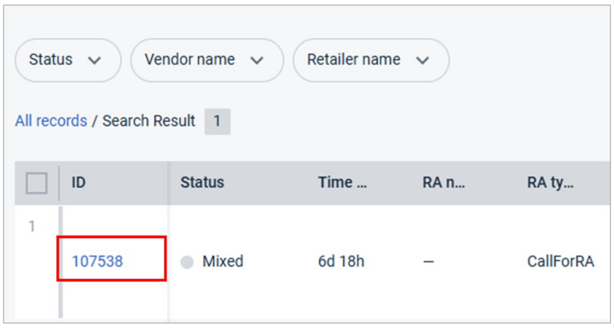
Update RA Shipping Address

If an RA has an incorrect shipping address and has an associated shipment, submit a request using the **Report Issue / Feedback** form so ReturnPro can apply the update. Otherwise, follow the updating process below.

1. From the main menu, select **RA management**.



2. Select the **ID** of the affected RA to open the RA details panel.



   - Use filters to locate RA records if needed (see the **Filters** section for guidance).

3. Next to Shipping address, select **Edit**.

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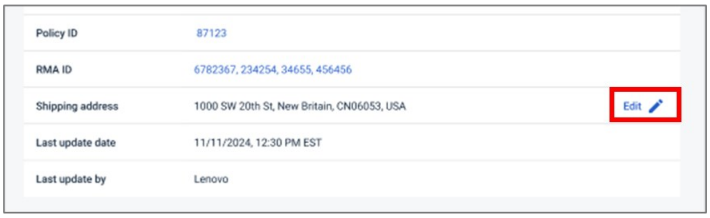
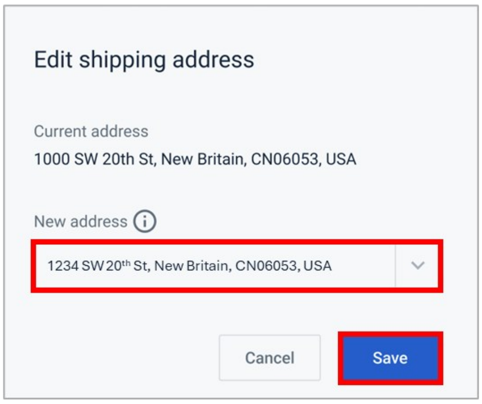


4. In the *Edit shipping address* window, search for and select the new address in the **New address** field.
5. Select **Save**.



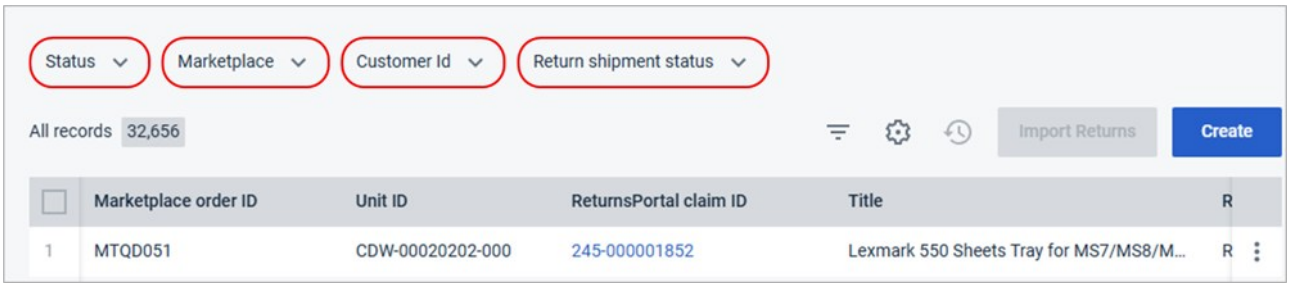
Grid Actions

Using Grid Filters

Filters are available in each of the grids. There are two types of filters: **Quick Filters** and **Smart Filters**.

Quick Filters

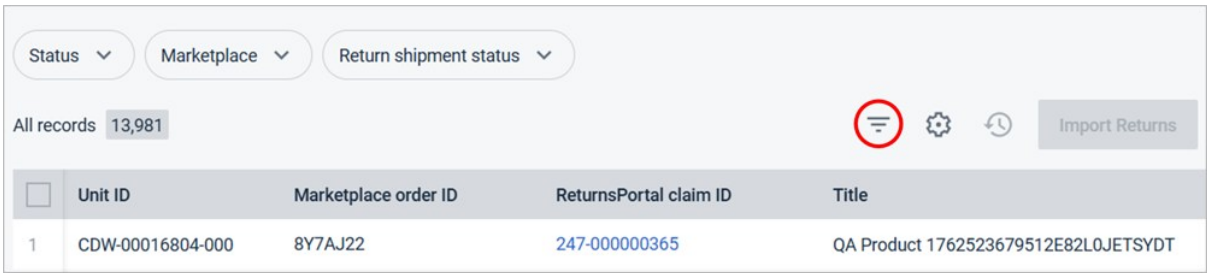
Quick filters are default filters that can be adjusted directly from the page without opening the **Smart filters** panel. Quick filter options vary by page. To use a quick filter, select the dropdown next to the desired filter and then select the appropriate option to filter the grid. For details about the available filter values, see the matching filter name in the Grid section for the page you are viewing.



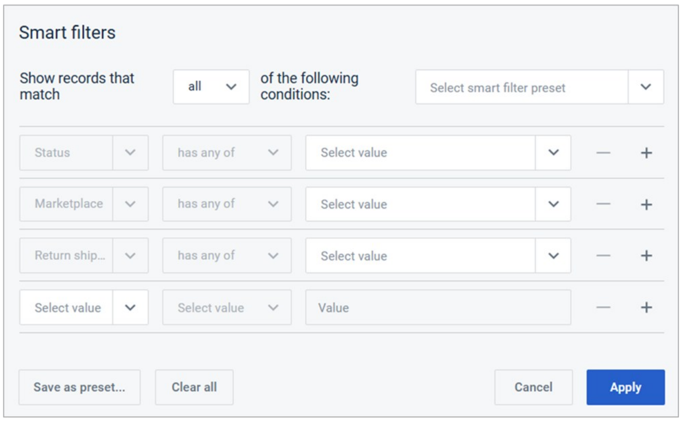
Smart Filters

Smart filters are available within the Smart filters panel and provide additional filters and conditions for narrowing your search. To access smart filters:

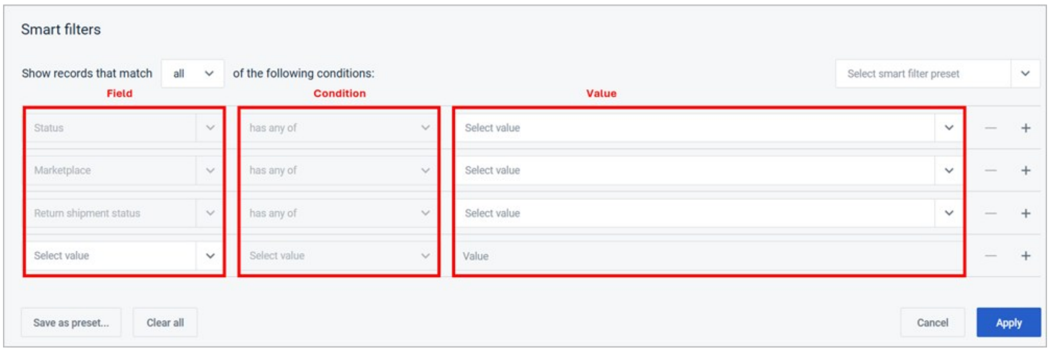
1. Select **Filter** () to open the **Smart filters** panel.



2. In the **Smart filters** panel, choose one or more fields to narrow your search.



- Each filter line contains three dropdowns:
  - **Field:** Select the attribute to filter by (e.g., *Status*).
  - **Condition:** Define how to match the value (e.g., *is*, *contains*, *starts with*).
  - **Value:** Enter or select the value to search for.



- Use the + or **–** icons to add or remove filters as needed.

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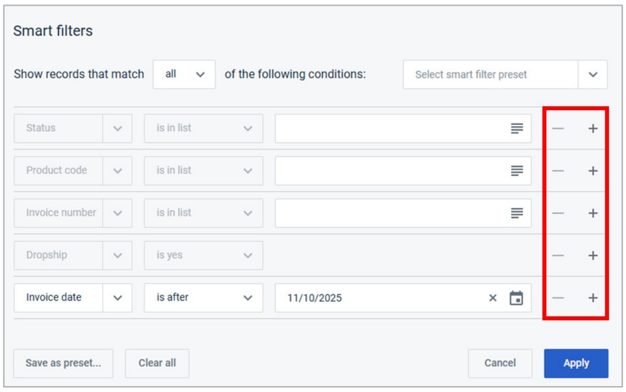
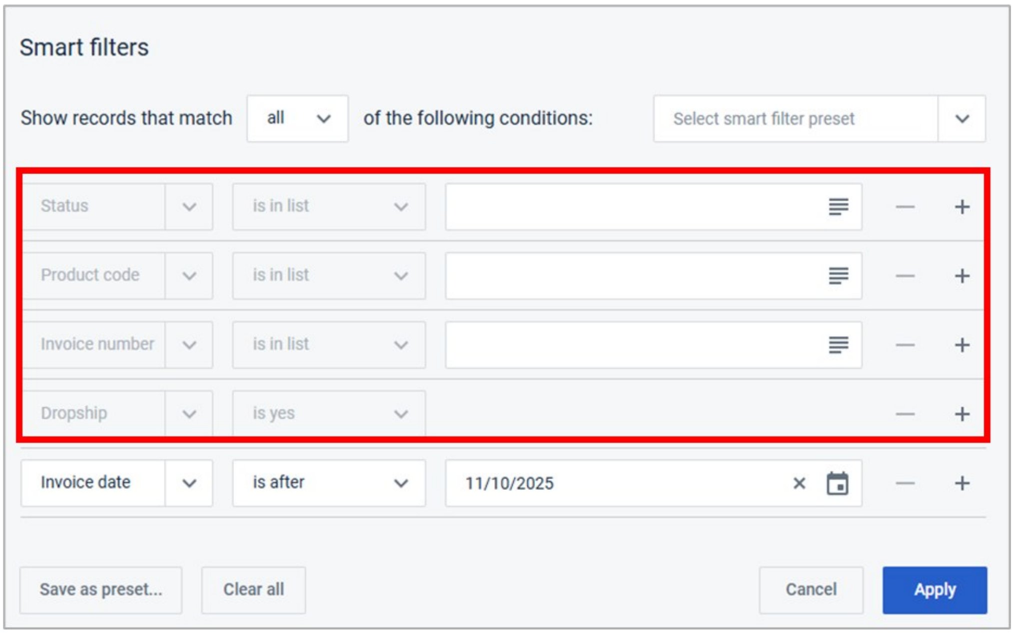
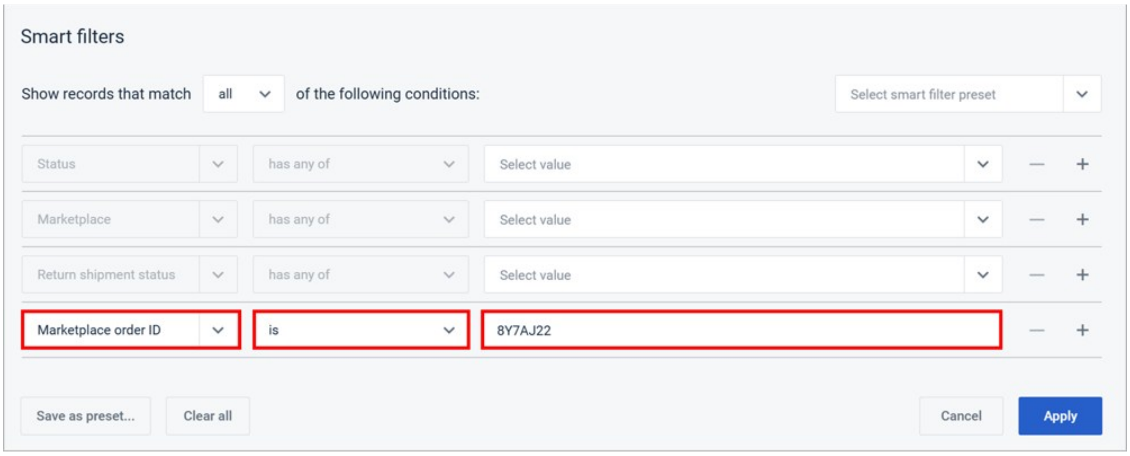


- The greyed-out filters are default filters and appear automatically and cannot be removed. These filters can also be adjusted directly from the grid page without opening the **Smart filters** panel (see *Quick Filters* section above).

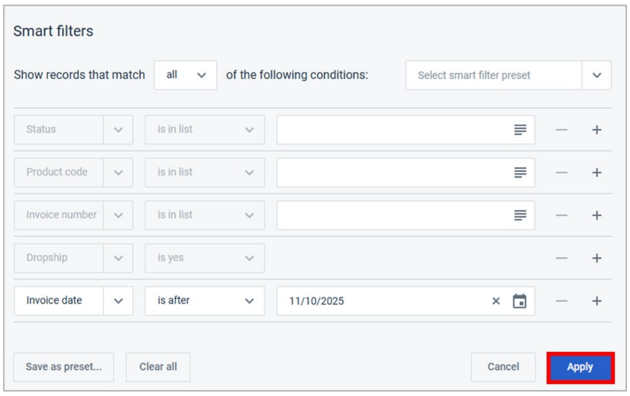


- Most columns in the grid can also be filtered. Refer to the Grid sub-section in the appropriate page section for detailed field descriptions.
- (Optional) Select **Save as preset** to reuse your configuration, or **Clear all** to reset. For more information about presets, see the *Saving Filter Presets* section.

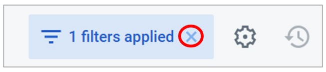
3. Enter your search rule(s).
    - **Example:** To locate a specific record, select the relevant field, choose the appropriate condition, and enter the value you want to match.



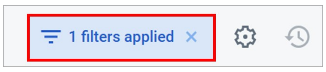
4. Select **Apply** to display all records that match your criteria.



- To clear all filters, select **X** on the **filters applied** button above the grid.



- To modify filters, select the **filters applied** button to reopen the **Smart filters** panel.

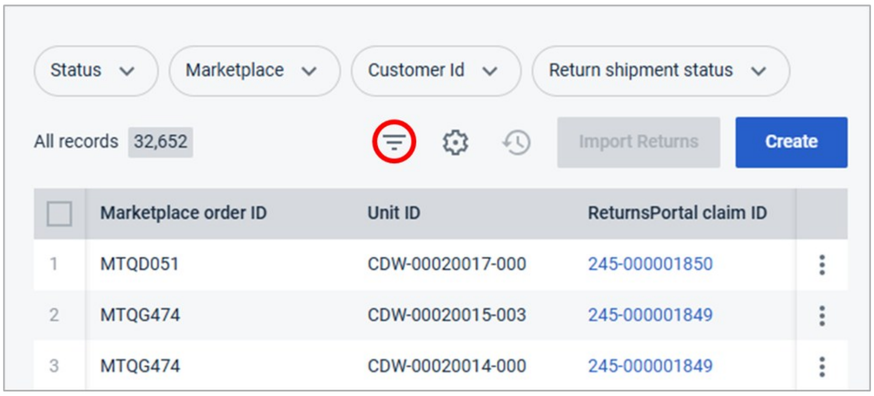


Saving Filter Presets

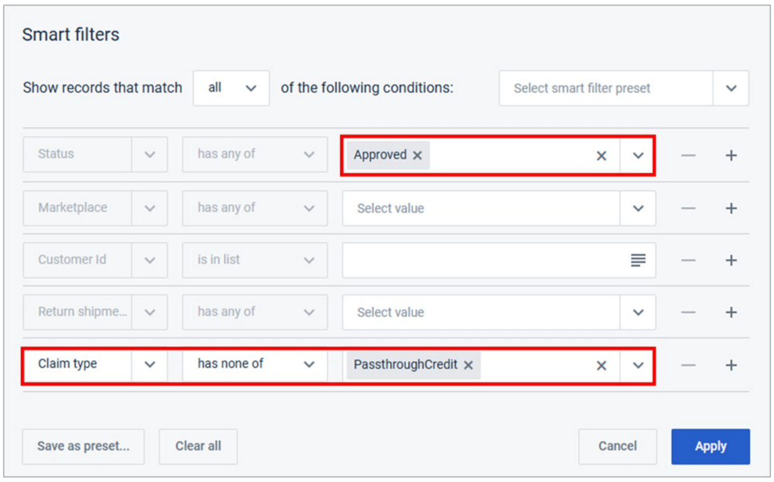
Smart filter presets let you save a set of filter selections so you can quickly reuse them without rebuilding the criteria each time. Presets can also be shared with your team if the sharing option is enabled. These presets can be created and used on any page grid in the portal. The steps below show you how to create a new preset.

Save a New Smart Filter Preset

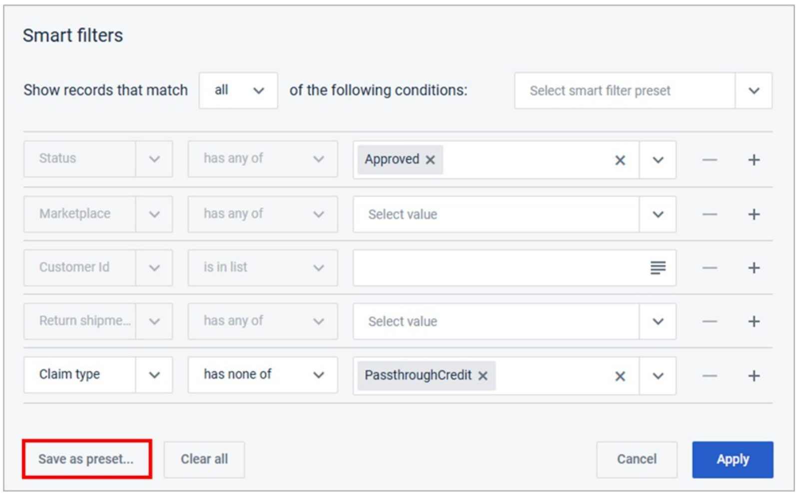
1. Select **Filter** ( ) above any grid.



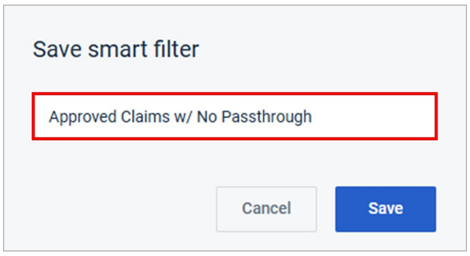
2. Add or adjust your filter conditions as needed.
    - For more information about adding filters, see the *Using Grid Filters* section.



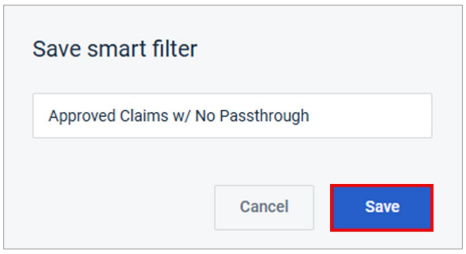
3. Select **Save as preset...** at the bottom of the panel.



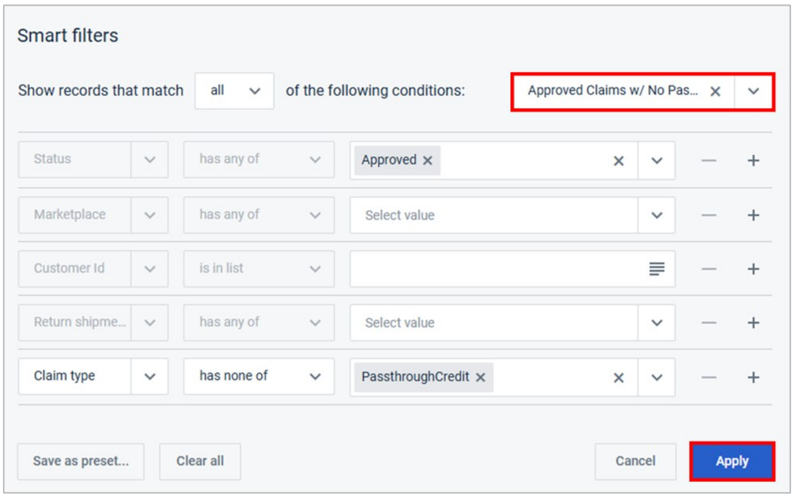
4. In the **Save smart filter** window, enter a name for the preset in the text box.



5. Select **Save** to confirm.

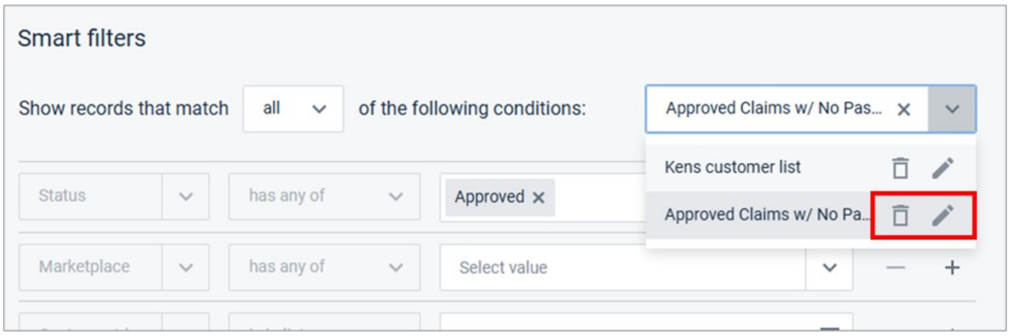


6. The preset becomes available in the **Select smart filter preset** dropdown in the top-right corner of the Smart filters panel. To use it, open the **Select smart filter preset** dropdown, select the preset, and choose **Apply**.

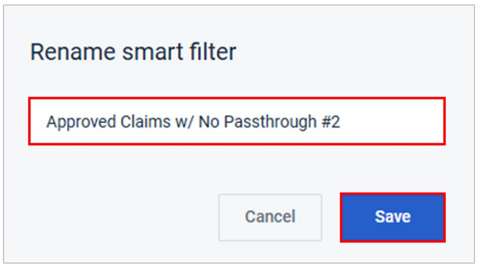


Rename or Delete a Smart Filter Preset

1. Open the **Select smart filter preset** dropdown.
2. Next to the preset name, select:
   - **Pencil icon** to rename the preset
   - **Trash icon** to delete the preset



3. If renaming, enter the updated name and select **Save**.



Note: Editing a preset only allows you to change its name. To update the filter conditions themselves, delete the existing preset and save a new one with the updated criteria.

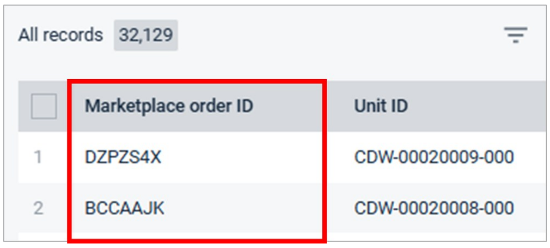
Configuring Grid Columns

You can customize the layout of each grid by adjusting which columns are visible and by rearranging their order. These settings allow you to create a view that best supports your workflow.

Reorder Columns

1. Hover over a column header in any grid.
2. Click and drag the column to a new position.

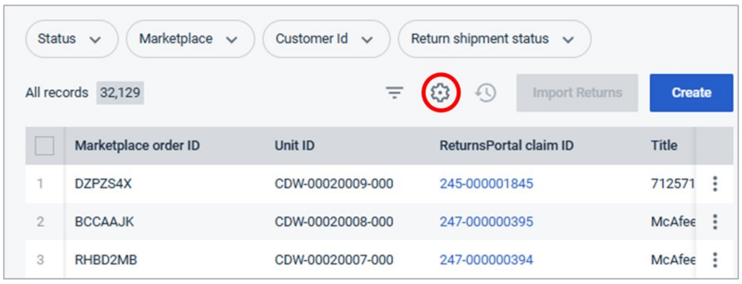
3. Release to place the column in the desired order.



Your changes are applied immediately.

Show or Hide Columns

1. Select the **Settings** () icon above any grid.



2. Select **Configure columns**.

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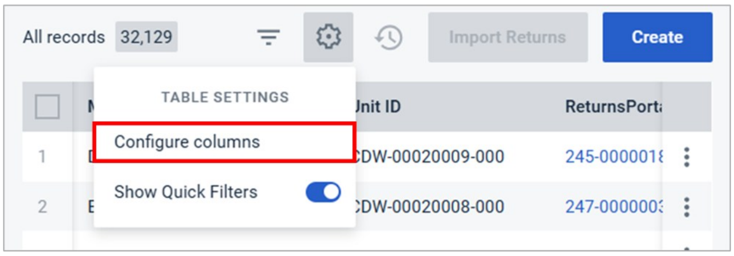
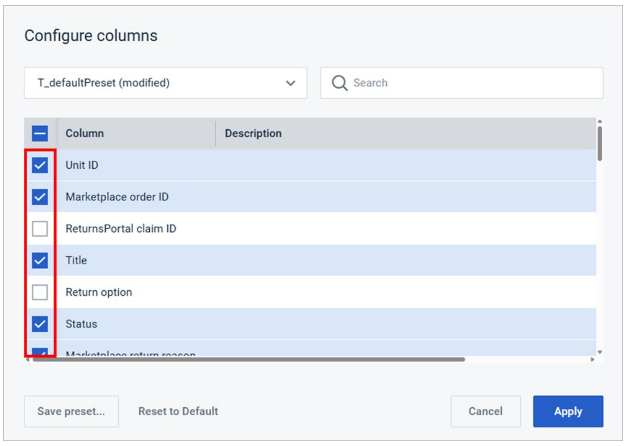
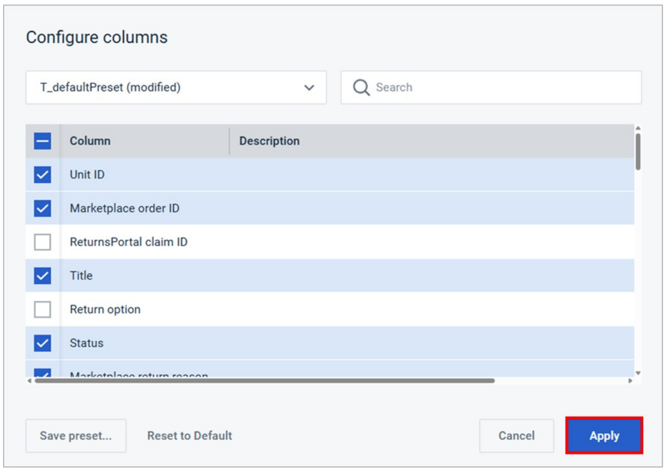


3. In the **Configure columns** panel:
    - Select the checkbox next to a column to display it.
    - Clear the checkbox to hide it.



4. Select **Apply** to update the grid.



Hidden columns can be shown at any time by reopening the **Configure columns** panel.

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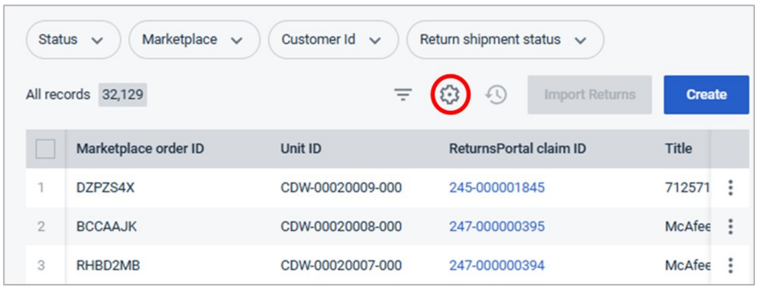
Saving Column Presets

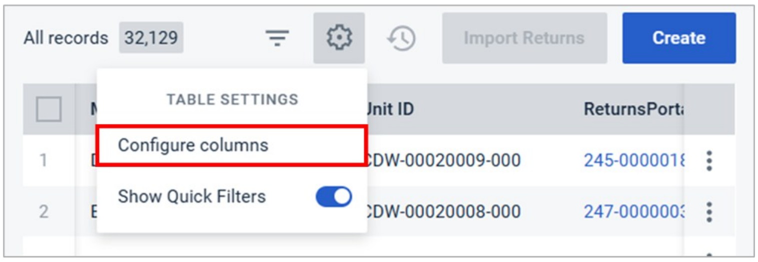
Column presets let you save customized column layouts so you can quickly switch between different grid configurations without rearranging columns each time. Presets can also be shared with your team if the sharing option is enabled. These presets can be created and used on any page grid in the portal. The steps below show you how to create a new column preset.

Save a New Column Preset

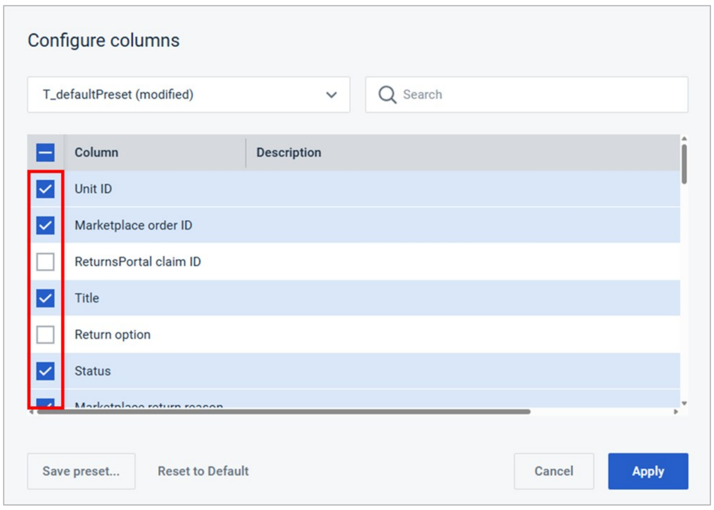
1. Select the **Settings** ( ) icon above any grid.



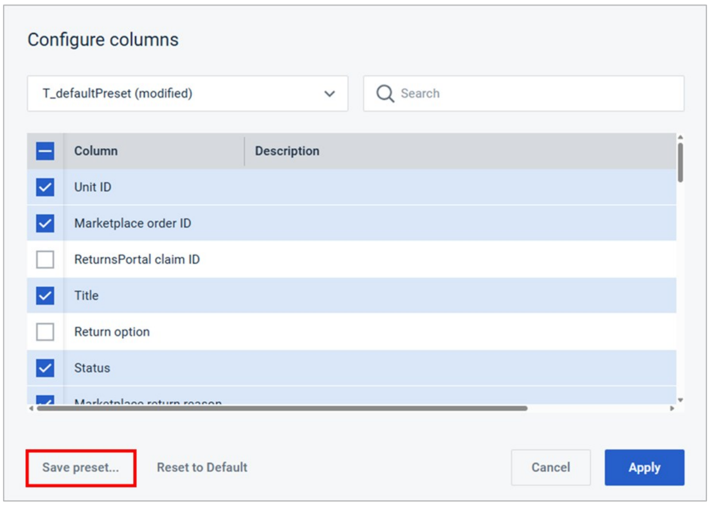
2. Select **Configure columns**.



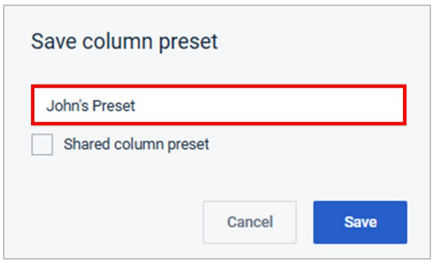
3. Adjust the visible columns as needed.



4. Select **Save preset...** at the bottom of the panel.

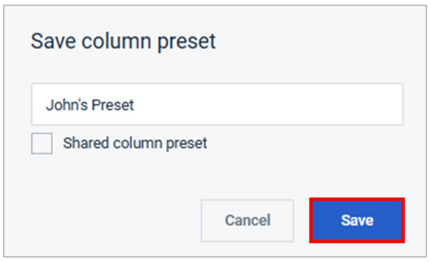


5. In the **Save column preset** window, enter a name for the preset.



   - (Optional) Select **Shared column preset** if you want the preset to be visible to your team.

6. Select **Save**.



7. The preset becomes available in the **T_defaultPreset** dropdown at the top of the Configure columns panel. To use it, open the **T_defaultPreset** dropdown, select the preset, and choose **Apply**.

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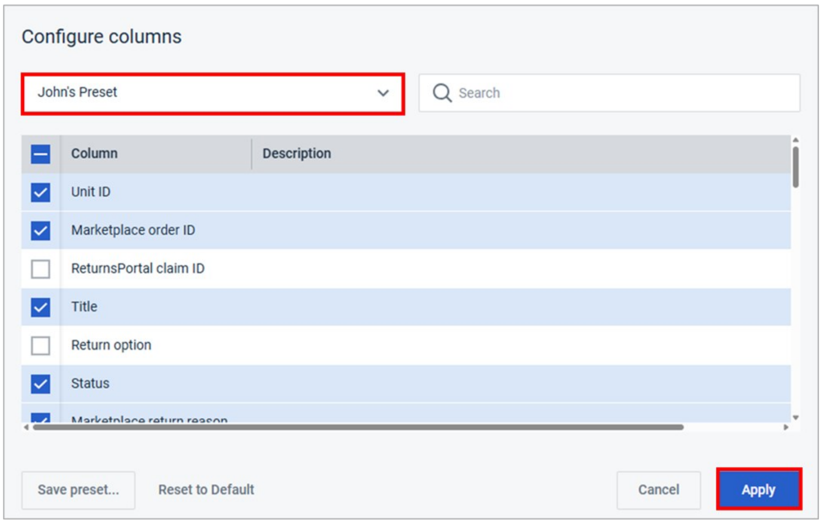
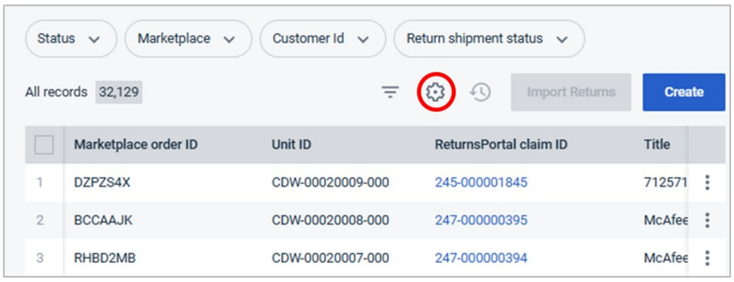
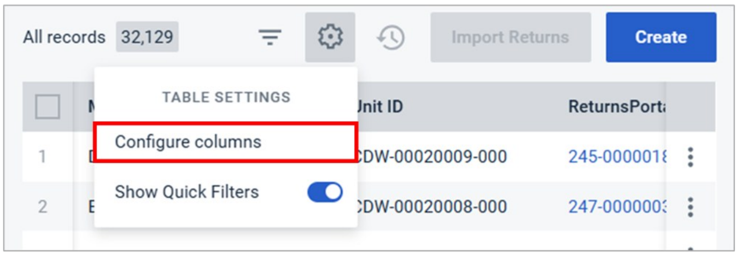


Rename or Delete a Column Preset

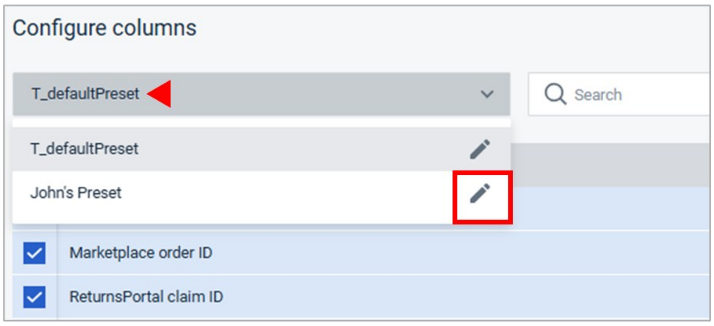
1. Select the **Settings** ( ) icon above any grid.



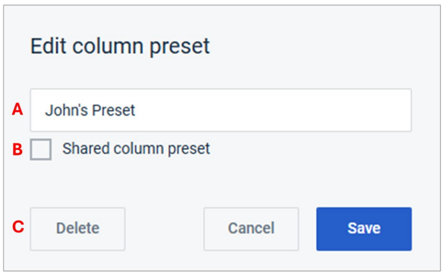
2. Select **Configure columns**.



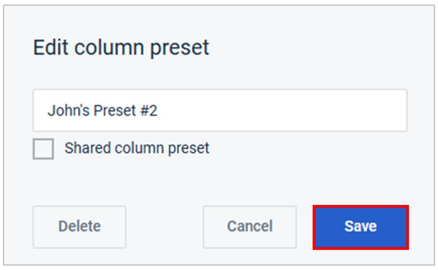
3. Open the **T_defaultPreset** dropdown and select **Edit** (pencil) next to the desired reset.



4. Make the necessary changes. You can:
    a. Rename the preset.
    b. Select **Shared column preset** to make it visible to your team.
    c. Select **Delete** to remove the preset.



5. Select **Save** to confirm any preset changes.



- If you choose **Delete**, the preset will be removed immediately and does not require saving.

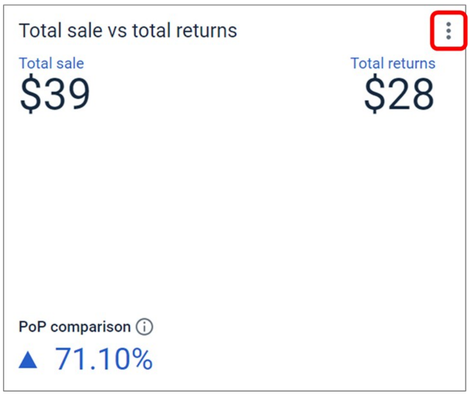
Note: To change which columns are included in a preset, delete the existing preset and save a new one with the updated configuration.

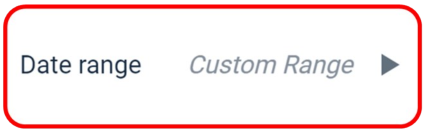
Tile Actions

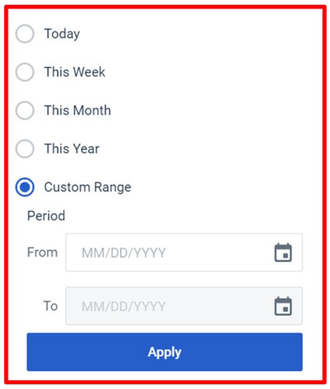
Adjusting Tile Date Ranges

Certain tiles include a **More actions** (⋮) icon that enables users to change the displayed date range for performance metrics and trends.

1. Select the **More actions** (⋮) icon on the applicable tile.
2. Choose **Date range**, then select a preset range or choose **Custom Range** to specify start and end dates.
3. Select **Apply** to refresh the data for the selected period.







ReturnPro

Appendix

Commands

See the table below for more information related to page commands.

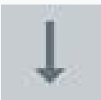
- **Note**: Available commands may vary by page.

ICON	NAME	DESCRIPTION
	Bookmark	Bookmark the page.
	Refresh	Refresh the records in the grid.
	Row Height	Adjust the row height of the grid.
	Filter	See records that match certain conditions. Available conditions vary by page.
	Table Settings	Adjust which columns are displayed in the grid.
	Search	Search for records containing keywords.
		Provides access to additional actions based on your current context, such as the navigation bar, detail panels, columns, rows, and tiles. **Navigation bar** Access additional global actions available from the navigation bar, such as submitting issues or providing feedback.

<table>
<tr><th>ICON</th><th>NAME</th><th>DESCRIPTION</th></tr>
<tr><td rowspan="8"></td><td rowspan="8">More Actions</td><td>Detail panels</td></tr>
<tr><td>Access actions related to the currently viewed record while viewing its details, such as reviewing history or taking action on the record.</td></tr>
<tr><td>Columns</td></tr>
<tr><td>Group records by values in this column.</td></tr>
<tr><td>Rows</td></tr>
<tr><td>Perform actions on a single record in the grid. Available actions vary by page and record status.

View: Opens a read-only panel displaying detailed information for the selected record. (Vendors, Policies, RA management, Shipments, Settlements)
View history: Displays a chronological record of changes made to the selected item, including timestamps, users, and field updates. (Vendors, Policies, RA management)
View conflicts: Displays any conflicting rules, conditions, or overlapping configurations identified within the policy. (Policies)
Download unit manifest: Exports a manifest listing all units contained within the selected shipment. (Shipments)
Print unit manifest: Generates a printable version of the shipment manifest, listing included units and shipment details. (Shipments)
Download excel: Exports settlement data for the selected record(s) into an Excel (.xlsx) format for reporting or reconciliation. (Settlements)
Download PDF: Exports the selected settlement as a formatted PDF invoice or report. (Settlements)
View unit details: Opens a detailed panel displaying item-level data for the selected unit, including identifiers, dispositions, and cost information. (Units)
View unit history: Displays an audit log of all system or user actions performed on the selected unit. (Units)
</td></tr>
<tr><td>Tiles</td></tr>
<tr><td>Change the date range for the desired tile.</td></tr>
<tr><td>Actions</td><td>Actions</td><td>Perform actions on selected records in the grid. Available actions vary depending on the page.

Export to excel: Export the selected record(s) to an Excel (.xlsx) file for offline review, reporting, or reconciliation. (Retailers, Vendors, Policies, RA management, Shipments, Settlements, Units)
Reject: Reject the selected RA request(s) and record a rejection reason. Rejected requests are not approved for return, shipment, or settlement. (RA management, Units)
Approve: Approve the selected RA request(s) for processing or settlement. (RA management, Units)
Approve with replacement: Approve the selected RA request(s) and issue a
</td></tr>
</table>

ICON	NAME	DESCRIPTION
		replacement product instead of a settlement, when permitted by policy. *(RA management, Units)* • **Download unit manifest**: Download a manifest listing the units included in the selected shipment(s). *(Shipments)* • **Print unit manifest**: Generate a printable version of the shipment manifest, including unit and shipment details. *(Shipments)* • **Change the disposition**: Update the disposition for the selected unit(s) to reflect the appropriate return handling outcome. *(Units)*
	Ascending	Sort records in ascending order by the values in the column.
	Descending	Sort records in descending order by the values in the column.

ReturnPro

Technical Requirements

Please bookmark cdw.returnpro.com/vendor-policy-hub for future reference and disable your pop-up blocker for ease of access. Check your system for the minimum and preferred requirements:

- Internet Browser: Google Chrome, Microsoft Edge, or Chromium
    - Microsoft Excel ® 2003
        - Adobe ® 7.0
        - Resolution: 800x600 minimum, 1024x760 preferred for all applications

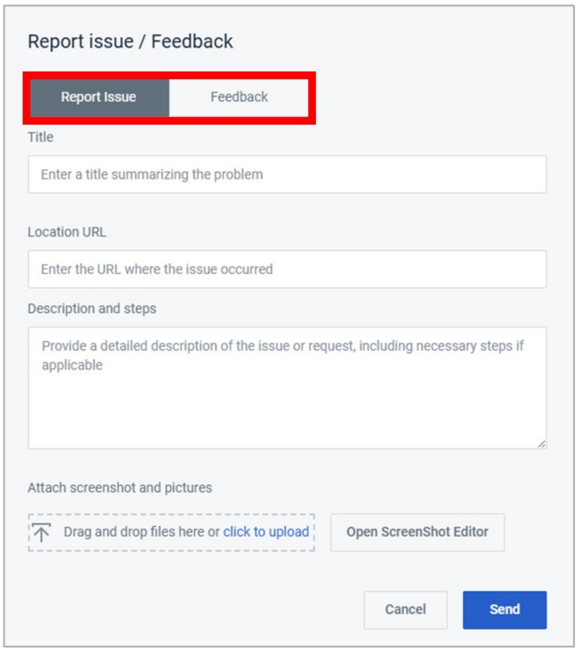
Reporting Issues and Feedback

The **Report issue / Feedback** form, accessible from the **More actions** menu, allows you to report problems or give feedback about the system.

To report issues or feedback:

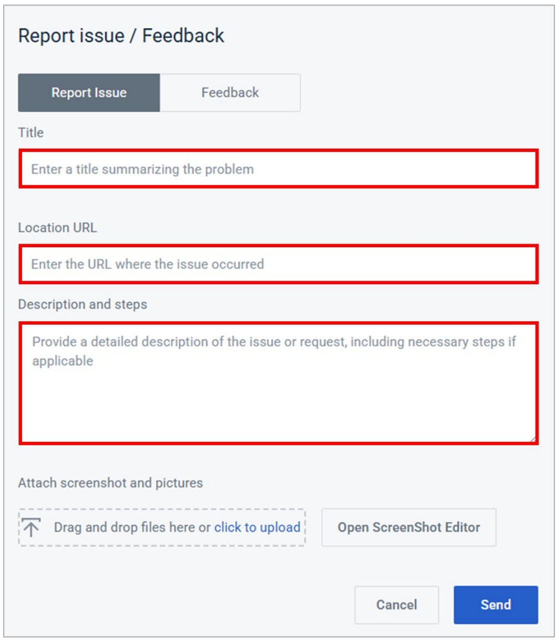
1. Select **Get help**.

2. Select the reason: **Report Issue** or **Feedback**.

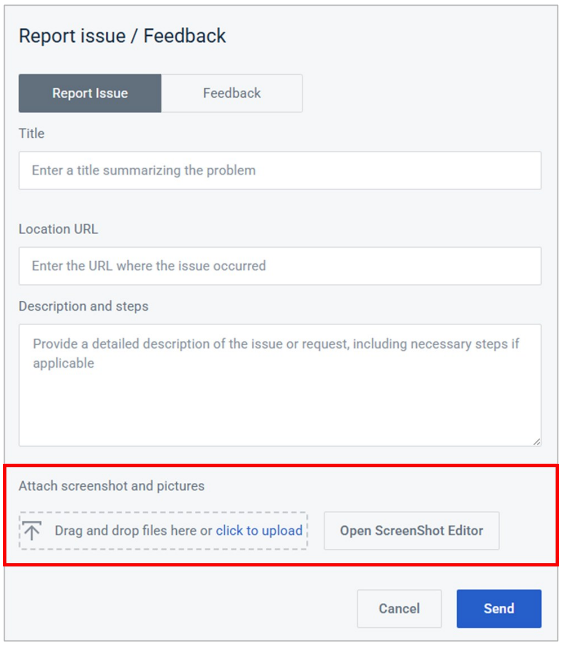


3. Complete the fields that display:
    - **Title**: Enter a brief title summarizing the problem or feedback.

- **Location URL**: Provide the URL where the issue occurred, if applicable.
- **Description and steps**: Provide a detailed description of the issue or feedback, including any necessary steps to reproduce the problem.



4. Attach screenshots and pictures.
    - Drag and drop pictures or use **click to upload** to upload any relevant media. Select **Open Screenshot Editor** for more detailed annotations.



5. Click **Send** to submit your report or feedback.

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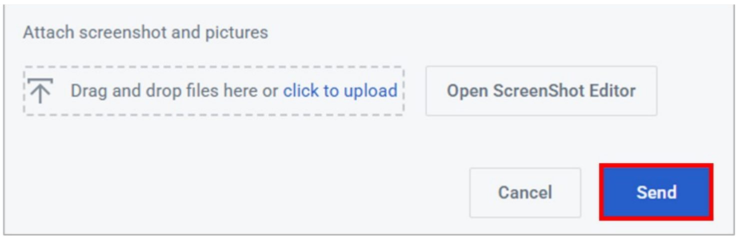

Additional Assistance

If you have any questions or concerns about your account or the return process, please contact Client Support at (800) 941-4777, Monday through Friday, from 8 AM to 5 PM ET, or email cdw@returnpro.zendesk.com.