
CLM020 Returns Policy Group Definition

Overview

The Claims Control module uses a Returns Percentage to measure Returns against a customer's last twelve months gross sales. In this case the gross sales are total sales less all no fault returns and less firm sales. Any claims that result in the threshold being exceeded pend for management review. The global Returns Percentage is defined on the appropriate Control File; the exceptions to this Return Percentage can be specified on the Returns Percentage Definition File. This facility allows for the definition of a Returns Threshold Percentage for various customer levels, for instance the Returns Percentage of a Buying Group may be set at a threshold which is higher than the global threshold.

Explanation

Using the Returns Percentage Definition, you can define whether you want one returns percentage rule to apply to all customers and all books, or whether there are exceptions to this rule. You can have different returns percentage rules for different types of books, or different types of customers. Each definition is allocated a group code which must be set up on the Returns Control Policy Control File (TMSAR/CL-CTL).

In the Pending Check program when calculating the return threshold the total returns include any outstanding returns that have not reached the sales analysis. All status OW and 06 claims are accumulated into the return figure. As part of the Returns Policy Group Definition search routine a return reason code is also searched for.

Damaged returns will have a shorter return window, for example invoices being returned as damaged can only be up to three weeks old. The Returns Policy Definition will include the reason code.

Examples

This section illustrates examples concerning:

[Example 1: Add a Returns Percentage Definition](#)

[Example 2: Change existing Returns Percentage Definition](#)

[Example 3: Delete existing Returns Percentage Definition](#)

Example 1: Add a Returns Percentage Definition

This example describes how to add a returns percentage definition.

1. Select option **CM Returns % Definition** from Base Modules>Distribution>Masterfiles>Database Management> Database Management>Customer Masterfiles menu.

CLM020A Returns Policy Group Definition panel is displayed.

File Tools Window Help

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Validation
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Quick Links

Templates

Attachments

*CM Returns % Definition

CLM020A > Returns Policy Group Selection

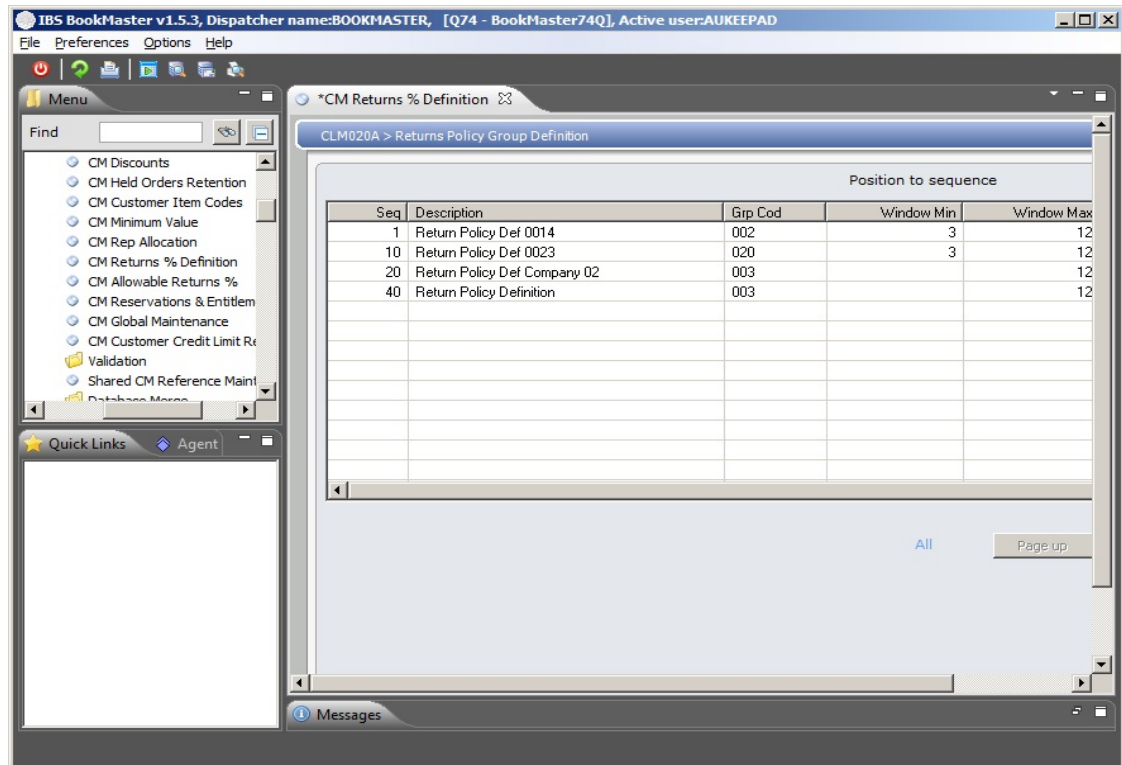
Type selection criteria, leave blank to select all.

Company		Item level 1	
Branch		Item level 2	
Region		Item level 3	
Major store		Item level 4	
Debtor class		Item level 5	
Cust. disc class		Item disc class	
Cust. class/code		Item class/code	
Billing number		Item	
Customer number		Item stk status	
Return reason		Brand code	
		Packaging type	

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2. Press <ENTER> or click **OK** to select all.

CLM020A Returns Policy Group Definition panel is displayed with the exiting policy group definitions.



Functions

Add

Adds a new returns policy group definition.

Options

Details

Use to view details of an existing return policy group definition

Copy

Copy an existing return group policy definition to create a new one.

Delete

Delete a return group policy definition.

3. Click **Add**.

CLM020B Returns Policy Group Definition panel is displayed in add mode.

IBS BookMaster v1.5.3, Dispatcher name:BOOKMASTER, [Q74 - BookMaster74Q], Active user:AUKEEPAD

File Preferences Help

Menu

Find

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- CM Held Orders Retention
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- Validation
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- Database Mages

Quick Links Agent

*CM Returns % Definition

CLM020B > Return Policy Group Definition > * Add *

Sequence number

Description

Group code

1=Select All 2=Select List 3=Omit List 4=Include Range 5=Exclude Range

Description	Value
<input type="checkbox"/> Company	
<input type="checkbox"/> Branch	
<input type="checkbox"/> Region	
<input type="checkbox"/> Major store	
<input type="checkbox"/> Debtors class	
<input type="checkbox"/> Customer class type	
<input type="checkbox"/> Billing number	
<input type="checkbox"/> Customer number	

Messages

Relevant Fields

Sequence number

A sequence number is given for each definition created to cater for multiple entries. A description has to be entered for the sequence as well.

Description

A description for the return group policy definition.

Group code

This code uniquely identifies a returns policy group definition. Each code is defined on a Control File and contains a special set of definitions pertaining to your company's various returns control policies. Refer to the Returns Control Policy Setup section for more details.

Company

This is the Company number that is to be used in the definition.

Branch

Customer branch codes can be included in this definition.

Region

A Region Description can be included in the definition.

Major Store

A Major Store is a store which is part of a chain of stores, for example Kmart, Myers, etc. and is one of the optional selection criteria.

Debtor class

Debtor's classification.

Customer class type

This is the customer classification type.

Customer class code

Classification types group customers into specific categories. The customer classification type defaults and can be overridden.

Billing number	The Billing Number or Bill To number is the account number against which all financial transactions like invoices, credits, journals are stored. The system defaults it to customer number. Customers can have more than one Billing Account.
Customer number	Each customer is assigned an alphanumeric code. This is the code by which the customer is always referred to and how access is gained to the customer's records.

4. Key in the fields and click **OK**.
Returns Percentage Definition is added.

Example 2: Change existing Returns Percentage Definition

This example describes how to change existing returns percentage definition.

1. Repeat steps **1 and 2** as in [Example 1: Add a Returns Percentage Definition](#)
2. Select an existing record and click on **Detail**.
CLM020 Returns Policy Group Definition panel is displayed in change mode.
3. To save changes, click **OK**.
Selected returns percentage definition is changed.

Example 3: Delete existing Returns Percentage Definition

This example describes how to delete existing returns percentage definition

1. Repeat steps **1 and 2** as in [Example 1: Add a Returns Percentage Definition](#)
2. Select an existing record and click on **Delete**.
CLM020 Returns Policy Group Definition panel is displayed in delete mode.
3. Click **OK** to confirm deletion.
Selected returns percentage definition is deleted.