

Product Returns to Supplier

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Manage Return

Business context

The Product Returns to Supplier functionality is used by the Bio Depot to document a return and the picking, packing, and shipping process.

Pre-requisites: Product must have been ordered through the supplier in order to be returned. Only products on the contract with the supplier may be returned. If a contract has expired, product may still be returned.

Triggers

- A product that was received from a supplier must be returned.
- Information about a return to a supplier must be reviewed or updated.
- An item on the return must be cancelled.
- An item on the return must be added to the return.
- The entire return must to be cancelled.

Standard Operating Procedures (SOPs)

- Vaccine Returns

Business Roles

The Product Returns to Supplier functionality is completed by the Bio Depot Biological Coordinator or the Admin support staff.

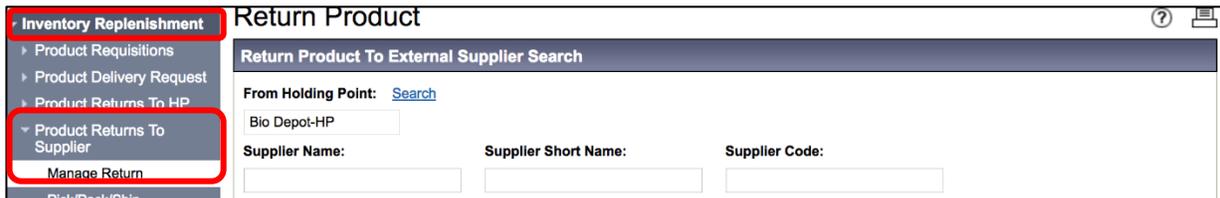
Panorama Role

The Product Returns to Suppliers functionality is restricted to users with the Inventory Provincial role.

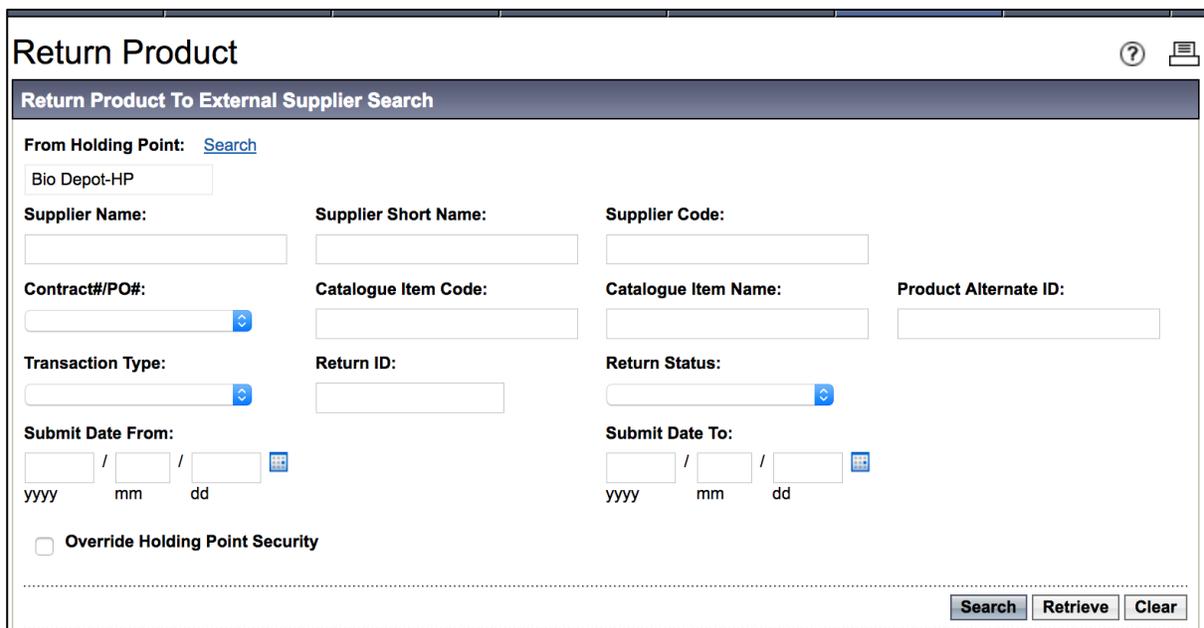
Steps: Search for Returns to Suppliers

Overview Steps: Inventory Replenishment>Product Returns to Supplier>Manage Return>Add search criteria>Search

1. Select **Inventory Replenishment** from the Left-Hand Navigation Menu; select **Product Returns to Supplier**, then **Manage Return**.



2. The **Return Product to External Supplier Search** screen displays.



3. Enter search criteria. Options include:
 - Supplier Name, Supplier Code, Catalogue Item Code or Product Alternate ID.
4. Click the **Search** button.
5. If results are available, they will generate in the **Return Product to External Supplier Search Results** section.

Return Product To External Supplier Search Results							
Your search criteria returned 1 result(s).							
Row Actions: <input type="button" value="Update"/>						<input type="button" value="Create New Return"/>	
Select	Return ID	Requested Return date	From Holding Point	To Supplier	Contract#/PO#	Transaction Type	Return Status
<input type="checkbox"/>	10	2017 Jun 28	Bio Depot-HP	GlaxoSmithKline	Contract-CRP2	Defective product	Pending Pick

Steps: View a Return to Supplier

Overview Steps: Search>Select return>Click **Update** button>View return>Cancel

1. Search for a return, following the Return to Supplier search process.
2. Select the checkbox next to the Return ID of interest and click the **Update** button.

Return Product To External Supplier Search Results							
Your search criteria returned 2 result(s).							
Row Actions: <input type="button" value="Update"/>							<input type="button" value="Create New Return"/>
Select	Return ID	Requested Return date	From Holding Point	To Supplier	Contract#/PO#	Transaction Type	Return Status
<input type="checkbox"/>	50	2017 Sep 15	Bio Depot-HP	Merck Canada Inc.	Contract01	For Credit	Shipped
<input checked="" type="checkbox"/>	51	2017 Sep 15	Bio Depot-HP	Merck Canada Inc.	Contract01	For Credit	Shipped

3. The **Return Product to External Supplier** screen displays. Review the return to supplier.

Return Product To External Supplier

* Required field

Return ID: 51 **Return Status:** Shipped

* **From Holding Point:** **From Holding Point Location:**
BioDepot-HPL2-Op

* **To Supplier Name:** * **Supplier Code:**

Supplier Short Name: * **Contract#/PO#:** * **Agreement Reference #:** * **Return Authorization Number:**

Supplier Contact: * **Transaction Type:** **Cold Chain Required:**

Supplier Ship To Address:

Use Ad Hoc Address

Ad Hoc Supplier Ship To Address:

Return Comment:

(100 characters)

Return Details to External Supplier

Cold Chain Required

Row Actions:	Status of the Line Item	Holding Point Location	Product Trade name	Lot Number	List Price	Expiry Date	*Return Quantity	Unit of Measure	*Return Reason
<input checked="" type="checkbox"/> <input type="button" value="Add Additional Line Item"/> <input type="button" value="Cancel Line Item of Return"/>	Shipped	BioDepot-HPL5-Return	Gardasil®	M006158	-	2018 Nov 3	1.0	Dose(s)	<input type="text" value="Expired product"/>

- Return Status, e.g., Pending Pick
 - The Holding Point Location of the product to be returned
 - The name of the product to be returned
 - The Lot Number
 - The return quantity
 - The reference number (a business generated number)
 - The return authorization number (a business generated number)
5. Click the **Cancel** button to return to the search screen.

Steps: Create a Return

	<ul style="list-style-type: none"> • A return to supplier can only contain products that are included in the specific contract held with the supplier. • Products for return must be products that were obtained through a PDR. • A return to supplier may be created and saved as Draft for future edits, or it may be submitted in readiness for picking.
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Overview Steps: Search>Click **Create New Return**> Add information > Save as Draft or Submit Return

1. Complete a Return to Supplier search.
2. Click the **Create New Return** button.

Return Product To External Supplier Search Results							
Your search criteria returned 2 result(s).							
Row Actions: <input type="button" value="Update"/>							<input type="button" value="Create New Return"/>
Select	Return ID	Requested Return date	From Holding Point	To Supplier	Contract#/PO#	Transaction Type	Return Status
<input type="checkbox"/>	50	2017 Sep 15	Bio Depot-HP	Merck Canada Inc.	Contract01	For Credit	Shipped
<input checked="" type="checkbox"/>	51	2017 Sep 15	Bio Depot-HP	Merck Canada Inc.	Contract01	For Credit	Shipped

3. The **Return Product to External Supplier** screen displays.

Return Product To External Supplier

* Required field

Return ID: 0	Return Status: NA		
* From Holding Point: Search Bio Depot-HP	From Holding Point Location: BioDepot-HPL3-CCQuar BioDepot-HPL5-Return BioDepot-HPL4-CCRev	* To Supplier Name: Merck Canada Inc.	* Supplier Code: Supplier1
Supplier Short Name: Merck	* Contract#/PO#: Contract01	* Agreement Reference #: N/A	* Return Authorization Number: Pending
Supplier Contact: Smith, Bill	* Transaction Type: Adverse storage conditic	Cold Chain Required: <input type="checkbox"/>	
Supplier Ship To Address: 16711 Trans Canada Highway, Kirkland QC H9R 4P8, Canada			
<input type="checkbox"/> Use Ad Hoc Address <input type="button" value="Generate Ad Hoc Address"/>			
Ad Hoc Supplier Ship To Address:			

4. Enter the return information.

- Required fields
 - **From Holding Point:** Click the **Search** hyperlink. This action takes the user to the **Holding Point Profile** screen, where the Bio Depot may be searched for and selected. Clicking **Add Holding Point(s)** will add the Bio Depot holding point and the Bio Depot holding point locations to the **Return Product to External Supplier** screen.
 - Supplier Name: Select from the drop-down menu.
 - Supplier Code: Will populate after **Supplier Name** is selected.
 - Contract#/PO#: Select from drop-down.
 - Transaction Type: Select reason for return, e.g., defective product.
 - Agreement Reference #: Enter N/A
 - Return Authorization #: This number will be provided following submission of the return. Enter "Pending".
- Other
 - Select the contact from the Supplier Contact drop-down menu.
 - From Holding Point Location: Select the Holding Point Location that contains the product for return.

5. Click the **Filter Line Items** button to show available products for return.

6. The **Return Details to External Supplier** section (see screenshot below) displays all available products that match.

Return Details to External Supplier

Cold Chain Required

Row Actions:

		Status of the Line Item	Holding Point Location	Product Trade name	Lot Number	List Price	Expiry Date	*Return Quantity	Unit of Measure	*Return Reason
<input checked="" type="checkbox"/>	<input type="checkbox"/>	NA	BioDepot-HPL5-Return	Gardasil®	M006158	-	2018 Nov 3	10	Dose(s)	For Credit

Catalogue Item Code: 27 **Product Alternate ID:** HPV-4(10)
Catalogue Item Name: Gardasil®(10 x 0.5mL)MF **Uncommitted Qty:** 183.0
Committed Qty: 50.0 **Historical Acquisition Cost:** \$ 2.50
Extended Cost: **Cold Chain Required:**
Quantity Recalled: 0.0 **QTY Shipped To Date:** 7,620.0
Total Returned for Credit to Date: 20.0 **Quantity Allowed to be Returned for Credit:** -
Total Returned for Replacement to Date: 0.0 **Quantity Allowed to be Returned for Replacement:** -
Return Line Item Number:

7. Select each line item to be returned and enter the **Return Quantity** and **Return Reason** for each product.
8. Optionally, expand the line item details by clicking the + icon and modify the **Historical Acquisition Cost** or **Cold Chain** requirement for each line item.
 - If the product is a cold chain product, the **Cold Chain Required** checkbox will be checked. If the **Cold Chain Required** checkbox is selected for one of the line items, the **Cold Chain Required** checkbox in the top part of the screen must also be selected.
 - **NOTE:** The comments about Cold Chain are for information only. Returns to Supplier from the Bio Depot will never have Cold Chain Requirements.

9. Click the **Save as Draft** button.
10. A confirmation message will display. Click OK.
11. The status is now **Draft**. A return ID has been assigned.

Row Actions:

		Status of the Line Item	Holding Point Location	Product Trade name	Lot Number	List Price	Expiry Date	*Return Quantity	Unit of Measure	*Return Reason
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Draft	BioDepot-HPL5-Return	Gardasil®	M006158	-	2018 Nov 3	10.0	Dose(s)	For Credit

Return Product ? 

Product Return has been saved/updated successfully.

Return Product To External Supplier

* Required field

Return ID: 69 Return Status: Draft

12. If the return is complete, click the **Submit Return** button.
13. Click **OK** to confirm.
14. After submitting, the status will change from Draft to Pending Pick.

Row Actions:		Add Additional Line Item		Cancel Line Item of Return		Filter Line Items			
	Status of the Line Item	Holding Point Location	Product Trade name	Lot Number	List Price	Expiry Date	*Return Quantity	Unit of Measure	*Return Reason
<input checked="" type="checkbox"/>	Pending Pick	BioDepot-HPL5-Return	Gardasil®	M006158	-	2018 Nov 3	10.0	Dose(s)	For Credit

15. Click **Cancel** to return to the search screen.

Steps: Update a Return

Overview Steps: Search> Select return> Click **Update** Button> Make updates> Save or Submit> OK

	A return must be in Draft status to make updates to the fields in the top section of the screen.
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1. Follow the search process.
2. Select a Return to be updated.

Return Product To External Supplier Search Results

Your search criteria returned 1 result(s).

Row Actions:		Update		Create New Return			
Select	Return ID	Requested Return date	From Holding Point	To Supplier	Contract#/PO#	Transaction Type	Return Status
<input checked="" type="checkbox"/>	69	2017 Oct 15	Bio Depot-HP	Merck Canada Inc.	Contract01	For Credit	Draft

3. Click the **Update** button.
4. The **Return Product to External Supplier** screen displays.

Return Product ? 

Return Product To External Supplier

5. Make changes as needed.
6. Select each line item to be saved.
7. If the return is in Draft status, click the **Save as Draft** button. If the return is complete, click **Submit Return**.



8. A confirmation message will display. Click **OK** to confirm.

Steps: Add Line Items

Overview Steps: Search> Click **Add Additional Line Item**> Search catalogue and click **Add Catalogue Item**> Save as Draft or Submit

★	<ul style="list-style-type: none"> • Additional Line Items may be added if the return is still in Draft status.
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1. Complete the search process and select the return.
2. In the **Return Details to External Supplier** section, click the **Add Additional Line Item** button.

Row Actions:		Add Additional Line Item	Cancel Line Item of Return	Filter Line Items						
	Status of the Line Item	Holding Point Location	Product Trade name	Lot Number	List Price	Expiry Date	*Return Quantity	Unit of Measure	*Return Reason	
✓	Draft	BioDepot-HPL5-Return	Gardasil®	M006158	-	2018 Nov 3	10.0	Dose(s)	For Credit	

3. The **Catalogue Item Search** screen displays.

Catalogue Item Information ?
Catalogue Item Search

4. The Catalogue search will only display products that are part of the contract held supplier for which the return is being created.

Search Results Returned

Your search criteria returned 1 result(s).

Select All Deselect All

<input type="checkbox"/>	Catalogue Item Code	Product Alternate ID	Catalogue Item Name	Catalogue Item Description	Catalogue Level	Current Catalogue Item Status
<input checked="" type="checkbox"/>	53	Pneu-P-23(10)	Pneumovax®23(10 x 0.5mL)MF	Pneumococcal Polysaccharide 23-Valent	6	Active

- If an item is available to order, select the item and click **Add Catalogue Item**. It will be added to the return.

Row Actions:

<input type="checkbox"/>	<input type="checkbox"/>	Status of the Line Item	Holding Point Location	Product Trade name	Lot Number	List Price	Expiry Date	*Return Quantity	Unit of Measure	*Return Reason
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Draft	BioDepot-HPL5-Return	Gardasil®	M006158	-	2018 Nov 3	10.0	Dose(s)	For Credit
<input type="checkbox"/>	<input type="checkbox"/>	NA	BioDepot-HPL3-CCQuar	Pneumovax®23	M035579	-	2018 May 16		Dose(s)	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	NA	BioDepot-HPL5-Return	Pneumovax®23	M035579	-	2018 May 16	10	Dose(s)	For Credit

Catalogue Item Code: 53 **Product Alternate ID:** Pneu-P-23(10)
Catalogue Item Name: Pneumovax®23(10 x 0.5mL)MF **Uncommitted Qty:** 150.0
Committed Qty: 10.0 **Historical Acquisition Cost:** \$ 1.50
Extended Cost: **Cold Chain Required:**
Quantity Recalled: 0.0 **QTY Shipped To Date:** 50.0
Total Returned for Credit to Date: 0.0 **Quantity Allowed to be Returned for Credit:** -
Total Returned for Replacement to Date: 0.0 **Quantity Allowed to be Returned for Replacement:** -
Return Line Item Number:

- Select all line items to be saved.
- Click the **Save as Draft** button or **Submit Return** button.
- The return with the additional item is saved and the return status remains Draft.
- Once the return is submitted, the status changes to Pending Pick.

Row Actions:

<input type="checkbox"/>	<input type="checkbox"/>	Status of the Line Item	Holding Point Location	Product Trade name	Lot Number	List Price	Expiry Date	*Return Quantity	Unit of Measure	*Return Reason
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Pending Pick	BioDepot-HPL5-Return	Gardasil®	M006158	-	2018 Nov 3	10.0	Dose(s)	For Credit

Steps: Cancel a Line Item

Overview Steps: Search> Select return> select line item>Click Cancel Line Item of Return> OK

	<ul style="list-style-type: none"> The Cancel Line Item of Return button is applicable for returns to a supplier in Pending Pick, Picked or Packed status. If all line items on the return are cancelled, the return status is automatically set to Cancelled. Additional line items cannot be added to a Return transaction after it has been submitted.
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1. Follow the search process and select the item to be cancelled.
2. Click the **Cancel Line Item of Return** button.

Row Actions:		Add Additional Line Item		Cancel Line Item of Return		Filter Line Items				
	Status of the Line Item	Holding Point Location	Product Trade name	Lot Number	List Price	Expiry Date	*Return Quantity	Unit of Measure	*Return Reason	
<input type="checkbox"/>	+	Pending Pick	BioDepot-HPL5-Return	Gardasil®	M006158	-	2018 Nov 3	10.0	Dose(s)	For Credit
<input checked="" type="checkbox"/>	+	Pending Pick	BioDepot-HPL5-Return	Pneumovax®23	M035579	-	2018 May 16	10.0	Dose(s)	For Credit

3. A confirmation message will display. Click the **OK** button confirm.
4. The return is saved and the status of the line item changes to Cancelled.

Row Actions:		Add Additional Line Item		Cancel Line Item of Return		Filter Line Items				
	Status of the Line Item	Holding Point Location	Product Trade name	Lot Number	List Price	Expiry Date	*Return Quantity	Unit of Measure	*Return Reason	
<input type="checkbox"/>	+	Pending Pick	BioDepot-HPL5-Return	Gardasil®	M006158	-	2018 Nov 3	10.0	Dose(s)	For Credit
<input checked="" type="checkbox"/>	+	Cancelled	BioDepot-HPL5-Return	Pneumovax®23	M035579	-	2018 May 16	10.0	Dose(s)	For Credit

Steps: Cancel a Return

Overview Steps: Search> Select return>Click **Cancel Return** button

	<p>You can cancel a return if the status is Draft, Pending Pick, Picked or Packed.</p>
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1. In the **Return Details to External Supplier** section, click the **Cancel Return** button.

Row Actions: <input type="button" value="Add Additional Line Item"/> <input type="button" value="Cancel Line Item of Return"/> <input type="button" value="Filter Line Items"/>										
		Status of the Line Item	Holding Point Location	Product Trade name	Lot Number	List Price	Expiry Date	*Return Quantity	Unit of Measure	*Return Reason
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Pending Pick	BioDepot-HPL5-Return	Gardasil®	M006158	-	2018 Nov 3	20.0	Dose(s)	For Credit

2. A confirmation message to cancel will display. **OK** to confirm the cancellation.
 - **Note:** The screenshot does not reflect a cancelled return.

Pick/Pack/Ship

Business context

The Bio Depot picks, packs, and ships returns to suppliers.

Triggers

- A return to supplier has been submitted. The product must be picked, packed, and shipped to the supplier.

Standard Operating Procedures (SOPs)

- Vaccine Returns

Business Roles

Returning product to suppliers is completed by staff at the Bio Depot.

Panorama Role

The Pick/Pack/Ship Return to Supplier functionality is restricted to users with the Inventory Provincial role.

Steps: Pick, Pack, Ship Return

Overview Steps: Search > Select return> Click **Pick List**> Add Picking information> Click **Completed Picking – go directly to Packing** > Pack> Click **Completed Packing** > Click **Completed Shipping**

1. Select **Inventory Replenishment** from the Left-Hand Navigation Menu; select **Product Returns to Suppliers**, then **Pick Pack Ship**.
2. The **Search Pick/Ship Returns** on the Return Product Fulfillment screen displays.
3. Enter the Return ID or the return status and click Search.

Search Pick / Ship Returns Hide Search Pick / Ship Returns

Ship To Holding Point: [Search](#)

Ship From Holding Point:

Return ID:

Return Status:

Return Type:

Submit Date From: / /

yyyy mm dd

Submit Date To: / /

yyyy mm dd

Phone Number: () ext.

Pick Start Date: / /

yyyy mm dd

Pick End Date: / /

yyyy mm dd

Catalogue Item Code:

Product Alternate ID:

Catalogue Item Name:

Manifest ID:

Required Delivery:

Delivery Zone:

Override Holding Point Security

4. The **Pick/Ship Returns Search Results** display.
5. In the **Search Pick/Ship Requisitions/Returns** section, select the return.

Pick/Ship Returns Search Results Hide Pick/Ship Returns Search Results

Your search criteria returned 1 result(s).

Row Actions:

Packing Reports:

Shipping Labels: No. of Labels

Manifest Reports:

	Pick Date	Ret ID	Ret	Ship To	Ret Status	Delivery Zone	Delivery Method	Requested Delivery / Pickup Holding Point Date	Ship From	Manifest ID
<input checked="" type="checkbox"/>	-	69	Return t...	Merck Canada Inc.	Pending Pick	-	NA	-	Bio Depot-HP	-

6. The **Pick List** button is enabled. Click the **Pick List** button.
7. The **Pick/Ship Requisition** screen displays.
8. Select **Shipping Payment Type**.
9. Add the **Pick Qty** amount.
 - **Important:** Physically pick the product before picking in Panorama.

Requisition Product Fulfillment

Pick / Ship Requisition

Return ID: 69 **Return Type:** For Credit **Ship From Holding Point:** Bio Depot-HP **Return Status:** Pending Pick
Ship-to Address: 16711 Trans Canada Highway, Kirkland QC H9R 4P8, Canada **Required Delivery:** - **Required Delivery Comment:** - **Requested Delivery / Pickup Date:** -
Delivery Zone: - **Requestor Contact Name:** - **Requestor Phone Number:** - **Ship-to Instructions:** -
Recipient: Merck Canada Inc. **Requisition Comments:** - **Packing Slip Comments:** - **Delivery Method:** -
Shipping Payment Type: **Number of Containers:** 0 **Carrier Tracking Number:** **Weight:** -
Shipping Comments:

Ret Line Item ID	Product Alternate ID	Catalogue Item Name	Cat Item Code	Holding Point Location	Lot Number	CC Req	UOM	Appr Qty	Pick Qty
19	HPV-4(10)	Gardasil®(10 x 0.5mL)MF	27	BioDepot-HPL5-Return	M006158 Expiry Date 2018 Nov 3	Refrigerated	Doses	10	<input type="text" value="10"/>

10. Click the **Completed Picking – go directly to Packing** button. A confirmation message displays and the Return Status changes to Picked.

Product Fulfillment

Return has been picked and saved successfully.

Pack Return

Return ID: 69 **Return Type:** For Credit **Ship From Holding Point:** Bio Depot-HP **Return Status:** Picked

11. Under Container Details, add the Packed Quantity.
 12. Click **Add Container**.

Container Details: Container ID: -

Product Alternate ID	Catalogue Item Name	Catalogue Item Code	Lot Number	Picked Quantity	Remaining Quantity to Pack	Packed Quantity	Unit of Measure	Cold Chain Required	Distribution Fee/Type	Estimated Weight
HPV-4(10)	Gardasil®(10 x 0.5mL)MF	27	M006158	10	10	<input type="text" value="10"/>	Doses	Refrigerated	-	0.0 Gram(s)

13. If applicable, click **Commit Actual Weight** button.

Container List			
Row Actions: <input type="button" value="Commit Actual Weight"/> <input type="button" value="Remove Container"/>		No. of Labels: 1	Shipping Label: <input type="button" value="Print Labels"/>
			Packing Report: <input type="button" value="Print Report"/>
	Container ID	Estimated Weight	Actual Weight
<input type="checkbox"/>	1	-	100 Gram(s)

14. Click **Completed Packing**.

<input type="button" value="Not Delivered"/>	<input type="button" value="Reset to Packed"/>	<input type="button" value="Delivered"/>	<input type="button" value="Completed Shipping"/>	<input type="button" value="Completed Packing"/>	<input type="button" value="Save as Draft"/>
		<input type="button" value="Attach Document"/>		<input type="button" value="Generate Shipping Manifest"/>	<input type="button" value="Cancel"/>

15. Status changes to Packed.

Product Fulfillment			
Return has been packed and saved successfully.			
Pack Return			
Return ID:	Return Type:	Ship From Holding Point:	Return Status:
69	For Credit	Bio Depot-HP	Packed

16. When the product has left the Bio Depot, click **Completed Shipping**.

<input type="button" value="Not Delivered"/>	<input type="button" value="Reset to Packed"/>	<input type="button" value="Delivered"/>	<input type="button" value="Completed Shipping"/>	<input type="button" value="Completed Packing"/>	<input type="button" value="Save as Draft"/>
		<input type="button" value="Attach Document"/>		<input type="button" value="Generate Shipping Manifest"/>	<input type="button" value="Cancel"/>

17. The Status changes to Shipped.

Product Fulfillment			
Returns have been shipped successfully.			
Pack Return			
Return ID:	Return Type:	Ship From Holding Point:	Return Status:
69	For Credit	Bio Depot-HP	Shipped