



## Returns & Shipments Module

**Save time** and **boost your revenue** from satisfied customers by using ezSupport's Returns & Shipments module to help manage and track all your merchandise returns and shipments.

Customers can file return merchandise requests from your help desk by submitting a form with questions you have customized for your business needs. Customers can also use your help desk to track shipments via UPS, FedEx, and US Postal.

After filing a return request, your customer receives an email confirmation and the assigned support rep or group is alerted. All return information is organized and presented clearly, and your entire returns process is managed to ensure that all necessary steps are taken.

Each return's progress is tracked from filing to completion, and all communication between the customer and support rep is saved with the customer's contact record for future reference.

Support reps can also file return requests directly on behalf of customers, such as in call center situations.

Plus customers can check the status of their tickets from your help desk 24/7/365.

### Price

**FREE!**

# Returns & Shipments Demo

**This demo illustrates a typical daily experience for both a customer and a support rep using ezSupport's Returns & Shipments module to return an item.**

**Site navigation displays at the top left corner of each demo page, indicating exactly where each step takes place in your ezSupport system.**

**So let's get started!**



### Customer Experience

- Customer has item to return. 2
- Customer files a return request. 3
- Customer receives confirmation. 4
- Customer tracks shipment. 7

### Support Rep Experience

- Rep is alerted to return request. 5
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## Customer Has Item to Return

Our demo company is **AAA Golf**, a golf equipment and supplies retailer.

**Jan** is a AAA Golf customer who was sent the wrong golf club and now needs to return the club and get the one she ordered.

Luckily for Jan, AAA Golf uses ezSupport's Returns system to manage its merchandise return process, so resolving her club exchange won't be a problem.

### Here's how it works...

#### 1 Jan goes to AAA Golf's help desk

AAA Golf has links to their ezSupport help desk on their website, on all their eBay listings, and also in their customer emails. In fact, seeing the clear and easy access that AAA Golf provides for customer support had helped convince Jan to make her purchase from AAA Golf.

Jan clicks AAA Golf's help button.

#### 2 Jan accepts AAA Golf's return policy

Jan sees a link to "Request a Return" on AAA Golf's help desk. When she clicks the link, Jan sees AAA Golf's return policy that she is required to accept in order to initiate her return request.

Jan checks the policy acceptance box and clicks the *Begin Return Process* button.

#### 3 Jan fills out her return request form

AAA Golf has customized their return form with fields to collect relevant information for their business such as item Model # and Brand. A Desired Resolution field has been included to help AAA Golf know what will satisfy the customer.

Jan fills in her return information form and clicks the *Submit* button.

Need HELP? click here

AAA Golf

Ask a Question Search Powered by HOSTED SUPPORT

**Question Topics**

- Item (5)
- Shipping (6)
- Payments (2)
- Returns (1)
- Other (5)

**Return Policy**

- Please complete your Return Request form on the following page with full and accurate information regarding all returned items.
- Your return request will be reviewed promptly, and an email will then be sent to you either alerting you that your request has been approved or explaining why your request has been denied.
- If your return request is approved, you will be issued a Return Authorization number that will be included in your response email.
- Merchandise must be returned COMPLETE. Charges may be assessed for any missing items.
- Our address for return shipments is:
  - AAA Golf
  - 10686 Sunset Boulevard
  - Los Angeles, CA 90045
- Your Return Authorization number must be included and marked clearly within your returned package.
- Upon receipt and processing of your returned merchandise, and depending on the nature of your return, you will either be issued a refund, credited the purchase price, or a replacement item will be sent to you.

I have read and understand the Return Policy.

Begin Return Process

AAA Golf

Ask a Question Search Powered by HOSTED SUPPORT

**Return Authorization Form: Case Information**

Invoice # \* 56215

| Model #           | Brand | Description | Purchase Price |
|-------------------|-------|-------------|----------------|
| Slingshot HL Iron | Nike  | Golf club   | \$248.76       |

-> Enter More Items

Reason for return \*  
I ordered the Nike Slingshot 4D Iron club, but received the Slingshot HL Iron by mistake.

Desired Resolution  
I'd like to exchange this club for the one I ordered.

Submit

## Customer Files a Return Request

### 4 Jan submits her email address

When Jan clicks the Submit button to file her return information form, she is asked to submit her email address. ezSupport's customer contact records are keyed to email address, so Jan is being asked for her email to determine whether she has a contact record existing in AAA Golf's support system.

If ezSupport finds a contact record for Jan, then her return request will be filed immediately and will be automatically attached to Jan's existing record. If a contact record is not found, then Jan will be prompted to fill out a contact information form.

*Jan submits her email address.*

The screenshot shows the AAA Golf support interface. On the left is a navigation menu with 'Question Topics' (Item (5), Shipping (6), Payments (2), Returns (1), Other (5)), 'Request a Return', 'Track a Shipment', and 'View Case Status'. The main content area has a search bar and a 'Powered by HOSTED SUPPORT' logo. Below the search bar, it says 'Thank you for taking the time to write this request. Please enter your email address below:'. There is an 'Email' field containing 'janbrady@gmail.com' and a 'Submit' button. A blue circle with the number '4' is next to the 'Submit' button, and a red arrow points from it down towards the next screenshot.

### 5 Jan submits her contact information

Jan's email address does not match an existing contact record, so AAA Golf's contact information form appears for Jan to fill out.

AAA Golf has customized their contact information form to collect the contact information they need. Fields for any information can be added to the contact information form. Fields can also be designated as *Required* so customers must enter the information to submit the form.

By submitting her contact information, Jan is creating a new contact record in AAA Golf's support system, and all future correspondence will be automatically attached to her record. So support reps don't have to manually create a contact record for each new customer.

*Jan submits her contact information, and her return request is filed.*

The screenshot shows the AAA Golf support interface with the contact information form. The navigation menu is the same as in the previous screenshot. The main content area has a search bar and a 'Powered by HOSTED SUPPORT' logo. Below the search bar, it says 'Your email address does not yet exist in our system. Complete the form below to create a contact record. This is only required the first time you submit a request with a new email address.' There are several input fields: 'Email \*' (janbrady@gmail.com), 'Re-enter Email \*' (janbrady@gmail.com), 'First Name \*' (Jan), 'Last Name \*' (Brady), 'Address1' (11222 Dilling Street), 'City' (Studio City), 'State' (CA), and 'Zip' (91604). A red asterisk indicates required fields. At the bottom, there is an 'Add' button. A blue circle with the number '5' is next to the 'Add' button, and a red arrow points from it to the right.

## Customer Receives Confirmation

### Jan receives return request filing confirmation

When Jan submits her contact information, she immediately sees a help desk message confirming that her return request has been successfully submitted.

Jan also receives an email confirmation that includes all her pertinent return information.

The screenshot shows the AAA Golf help desk interface. On the left is a navigation menu with 'Question Topics' (Item (5), Shipping (6), Payments (2), Returns (1), Other (5)), 'Request a Return', 'Track a Shipment', and 'View Case Status'. The main content area displays a 'Thank you' message: 'Your request has been successfully submitted.' To the right is an email notification from support@aaagolf.com to Jan, dated July 11, 2010. The email details a return request for a Nike Slingshot HL Iron club, including the invoice number (56215), reason for return (mistake in order), and desired resolution (exchange). It also lists item details: Model #, Brand (Nike), Description (Golf club), and Purchase Price (\$248.76). The email is signed by the Customer Support Team at AAA Golf.

### Jan can always view her return status

AAA Golf also provides the help desk option for customers to log in and view the status of all current and prior return requests. So Jan can click the "View Case Status" link any time she wants, and by entering her email address she will be able to see whether her return request is New, In-Process, Approved or Rejected..

The screenshot shows the 'View Case Status' feature in the AAA Golf help desk. A form prompts the user to enter their email address (janbrady@gmail.com) to view their case log history. Below this is a table of return requests. The table has columns for '#', 'Date Submitted', and 'Status'. One request is listed with ID 00000309, submitted on 07/11/2010, and with a status of 'Approved'. The interface also includes the same navigation menu as the previous screenshot and a 'User Returns | Edit Account | Logout' link.

| #        | Date Submitted | Status   |
|----------|----------------|----------|
| 00000309 | 07/11/2010     | Approved |

## Rep is Alerted to Return Request

### 1 Rep is alerted to Jan's ticket

When Jan submits her ticket the rep who has been assigned initial responsibility for returns, **Danny**, immediately receives an email alert that a new return request has been filed.

Danny reviews Jan's return information and assigns himself as Authorizing Agent, so he will be the rep who is in charge of managing the return's process. Authorizing Agent status can be reassigned to another rep at any time. Danny also sets Jan's return priority level as "High" because of the error that was made by AAA Golf with Jan's original shipment.

*Danny clicks the Update button to save his selections.*

When Danny updates Jan's return with an Authorizing Agent assigned, the return's status changes from "New" to "In-Process".

**Support Center** | Tools | Configuration | Company Profile | View Your Help Desk

Summary | Messages | Tickets | **Returns** | Contact Manager | Calendar

**Return Information** | Authorization | Send Response | Apply Credit | Return History | Transfer [?]

Authorizing Agent: **Danny Alvarado** | Priority Level: High | Return Status: In-Process **1** | **Update** | Back

Send alert email to rep

| Contact Information |                      | Return Information |   |
|---------------------|----------------------|--------------------|---|
| Account             |                      | Return Number      | 00000309  |
| First Name          | Jan                  | Date               | 07/11/10 1:58PM   |
| Last Name           | Brady                | Invoice #          | 56215   |
| Email               | janbrady@gmail.com   | Reason for return  | I ordered the Nike Slingshot 4D Iron club, but received the Slingshot HL Iron by mistake. |
| Address1            | 11222 Dilling Street | Desired Resolution | I'd like to exchange this club for the one I ordered.                                     |
| City                | Studio City          |                    |   |
| State               | CA                   | <b>Item No. 1</b>  |   |
| Zip                 | 91604                | Model #            | Slingshot HL Iron   |
|                     |                      | Brand              | Nike  |
|                     |                      | Description        | Golf club   |
|                     |                      | Purchase Price     | \$248.76  |

### 2 Danny authorizes Jan's return

Danny approves Jan's return after reviewing all the return information. Danny also adds notes and special handling instructions to the return's information so Jan's returned golf club is properly inspected and added back to stock when it is received and Jan's replacement club is promptly shipped to her.

*Danny then clicks the Save button.*

When Danny saves Jan's return authorization as Approved, the return's status changes from "In-Process" to "Approved".

**Support Center** | Tools | Configuration | Company Profile | View Your Help Desk

Summary | Messages | Tickets | **Returns** | Contact Manager | Calendar

**Return Information** | **Authorization** | Send Response | Apply Credit | Return History | Transfer [?]

Return Authorization # 00000309

Approve/Reject \* Approved | Model # Slingshot HL Iron | Brand Nike | Description Golf club | Purchase Price \$248.76 | Restocking Fee \* None | Warranty Code \* N/A | Inspection Req \* Yes

\* Internal Use

Notes: Return shipment box has been overnighted.

Reimbursement: Replace

Other:

Handling Instructions Upon Receipt: Return to Stock

Other:

Additional Instructions: Upon receipt, inspect returned HL club before restocking and immediately overnight 4D club.

**2** | **Save**



## Customer Tracks Shipment

### 1 Jan receives Danny's response

Danny's response is immediately emailed to Jan, and Jan is impressed that AAA Golf has responded to her return request so quickly. That other golf retailer she's done business with has always taken much longer to get back to her.

Jan is pleased that AAA Golf will be exchanging her golf club immediately and that the return procedure is clearly detailed for her.

☆ support@aaagolf.com to me [show details](#) 2:50 PM (2 minutes ago) [Reply](#)

Hello Jan, 1

We're very sorry that you received the wrong club. A pre-addressed and pre-paid return shipment box has been overnighted to you. As soon as you received the return box, just ship the club back to us and we will then overnight your new club. Please include your Return Authorization #00000309 with your return.

[Click here](#) to review our merchandise return policy and instructions.

Sorry again for the inconvenience,

Daniel Alvarado  
AAA Golf

=====

On July 11, 2010 we received the following Return request:  
 Invoice #: 56215  
 Reason for return: I ordered the Nike Slingshot 4D Iron club, but received the Slingshot HL Iron by mistake.  
 Desired Resolution: I'd like to exchange this club for the one I ordered.

Item #1  
 Model #: Slingshot HL Iron  
 Brand: Nike  
 Description: Golf club  
 Purchase Price: \$248.76

### 2 Jan tracks her return shipment

Jan receives her return shipment box the following morning, so she ships the golf club she received by mistake back to AAA Golf right away.

The next day, Jan is curious to know the progress of her returned package, and she remembers seeing that AAA Golf provides a shipment tracking feature on its help desk.

So Jan returns to AAA Golf's help desk and clicks the "Track a Shipment" feature.

Jan selects the carrier UPS, and when she submits the tracking number for her return package a UPS webpage pops up with her package tracking information.



Powered by  


**Question Topics** ↑

- Item (5)
- Shipping (6)
- Payments (2)
- Returns (1)
- Other (5)

**Shipping Tracking**

Select the shipping carrier:

UPS

US Postal

FedEx

Enter your tracking number

2

**Request a Return**

**Track a Shipment**

**View Case Status**

### Rep Resolves the Return

#### Danny resolves and closes Jan's return

Jan's returned golf club is received by AAA Golf. The club is inspected and restocked, and Jan's exchange golf club is shipped to her.

With all the necessary steps taken to resolve Jan's return, *Danny updates Jan's return crediting information on her return's Apply Credit page, checks the "Closed" box, and clicks the "Save" button.* This effectively completes the return process.

Closed returns are never deleted from ezSupport. They remain viewable, are archived with customer contact records, and can also be reopened if necessary. Every return's complete history and communication thread along with any notes added by reps can always be viewed by clicking the return's Return History link.

**Support Center** | Tools | Configuration | Company Profile | View Your Help Desk

Summary | Messages | Tickets | **Returns** | Contact Manager | Calendar

Return Information | Authorization | Send Response | **Apply Credit** | Return History | Transfer

**Return Authorization #00000309**

Invoice #: 56215  
 Reason for return: I ordered the Nike Slingshot 4D Iron club, but received the Slingshot HL Iron by mistake.  
 Desired Resolution: I'd like to exchange this club for the one I ordered.

| Item # | Model #           | Brand | Description | Purchase Price | Restocking Fee | Warranty Code | Received | Passed Inspection | Received Date |
|--------|-------------------|-------|-------------|----------------|----------------|---------------|----------|-------------------|---------------|
| 1      | Slingshot HL Iron | Nike  | Golf club   | \$248.76       | None           | N/A           | Yes      | Yes               | 7/14/10       |

Notes: Return shipment box has been overnighted.  
 Reimbursement: Replace  
 Other:  
 Handling Instructions Upon Receipt: Return to Stock  
 Other:  
 Additional Instructions: Upon receipt, inspect returned HL club before restocking and immediately overnight 4D club.  
 RECEIVER NOTES: Replacement club has been overnighted to customer. UPS tracking #1Z8A5E940342101969

Print |  Close Return | **Save**

### And that's how ezSupport's Returns & Shipments works!

**Support Center** | Tools | Configuration | Company Profile | View Your Help Desk

Summary | Messages | Tickets | **Returns** | Contact Manager | Calendar

Return Information | Authorization | Send Response | Apply Credit | **Return History** | Transfer

[ Insert Notes ]

| Date Time       | Action           | Notes  | Enter By       |
|-----------------|------------------|--|----------------|
| 07/14/10 1:38PM | Return Closed    | Replacement club has been overnighted to customer. UPS tracking #1Z8A5E940342101969<br>Hello Jan.  | Danny Alvarado |
| 07/11/10 2:50PM | Resolution Sent  | We're very sorry that you received the wrong club. A pre-addressed and pre-paid return shipment box has been overnighted to you. As soon as you received the return box, just ship the club back to us and we will then overnight your new club. Please include your Return Authorization #00000309 with your return.<br>Click here to review our merchandise return policy and instructions.<br>Thank you,<br>Daniel Alvarado<br>AAA Golf | Danny Alvarado |
| 07/11/10 2:10PM | Agent Authorized | Assigned to Danny Alvarado   | Danny Alvarado |
| 07/11/10 1:58PM | Return Requested | Return Open  | Customer       |

One more thing...

Reps can File Returns Too

Reps can also file returns directly on behalf of customers (such as in a contact center setting) via customer contact records. So customer return requests reported in off-line circumstances can be included with the regular returns process for consistency in handling and tracking.

**For instance**, if Jan had called AAA Golf with her return request instead of using the help desk, Danny could have entered Jan's return information into the system by accessing Jan's contact record in ezSupport's Contact Manager. Or, because Jan did not have an existing contact record, Danny could have created a new record for Jan on the fly.

Then Danny would simply click the "Returns" tab on Jan's contact record. This is where all of Jan's returns history will be archived. Danny would then click the "Create a Return" link to enter Jan's return information using the same form that is available on AAA Golf's help desk.

Returns created by reps via contact records enter the regular ezSupport returns flow. Customers and reps will receive the usual email confirmations and alerts, and returns can be handled by the appropriate reps as normal.

The screenshot shows the 'Contact Manager' interface. At the top, there are navigation tabs: 'Support Center', 'Tools', 'Configuration', and 'Company Profile'. Below these are sub-tabs: 'Summary', 'Messages', 'Tickets', 'Returns', 'Contact Manager', 'Calendar', and 'Chat'. The 'Returns' tab is highlighted with a red box. Below the tabs, there is a search bar with a dropdown menu and a 'Submit' button. The main content area shows a form for 'Contact Information' with fields for First Name (Jan), Last Name (Brady), Address 1 (11222 Dilling Street), Address 2, City (Studio City), State (California), Region, Country, and Zip (91604). There are also fields for eBay ID (janbradyforever), Email (janbrady@gmail.com), Account, Company, Daytime Phone (310.234.5678), Evening Phone, Mobile Phone, Fax, Contact ID, and Status (Active). An 'Update' button is located at the bottom of the form.

The screenshot shows the 'Returns' history for contact Jan Brady. The table has columns for '#', 'Date/Time', 'Customer', 'Status', 'Priority', and 'CSR'. The data row shows a return with ID 00000309, dated 07/11/10 at 8:58PM, for customer Jan Brady, with a status of 'Closed', priority of 'None', and assigned to CSR D. Alvarado. There is a '[ Create a Return ]' link to the right of the table.

| #        | Date/Time       | Customer  | Status | Priority | CSR         |
|----------|-----------------|-----------|--------|----------|-------------|
| 00000309 | 07/11/10 8:58PM | Jan Brady | Closed | None     | D. Alvarado |