21_Create Return Order

Purpose:

The purpose of this task is to create a Return order in Workday to send items back to a supplier.

How to Access:

Open the **My Recent Purchase Order** worklet, click the **Additional Actions** button to the right of the required purchase order, and select **Return** > **Create**.

Audience:

Buyers and Principals

Helpful Hints:

- Be sure to keep in mind that only select users will have access to create Return orders in Workday. If you are not authorized to create purchase orders, you will not be able to access this task.
- A Return order can only be created for purchase orders that have been issued but not invoiced.
- Workday displays fields in this task that CMSD is not using, only the fields listed in this document require you to complete, review, and/or update.

Procedure:

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

Create Return from Purchase Order

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

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

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

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

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

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

You have submitted Return
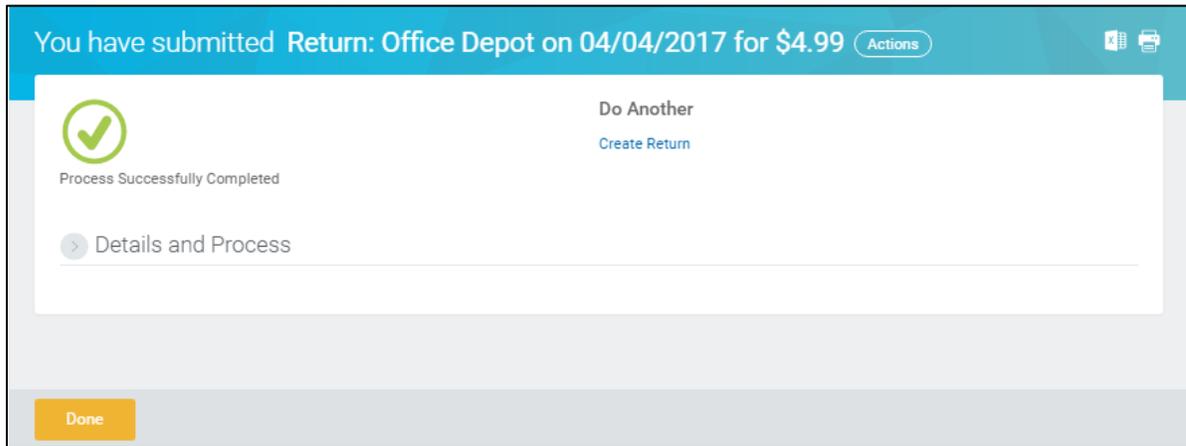
6. Review the displayed information.
7. Click **Done**, and go to the **Results** section of this document.

View Return
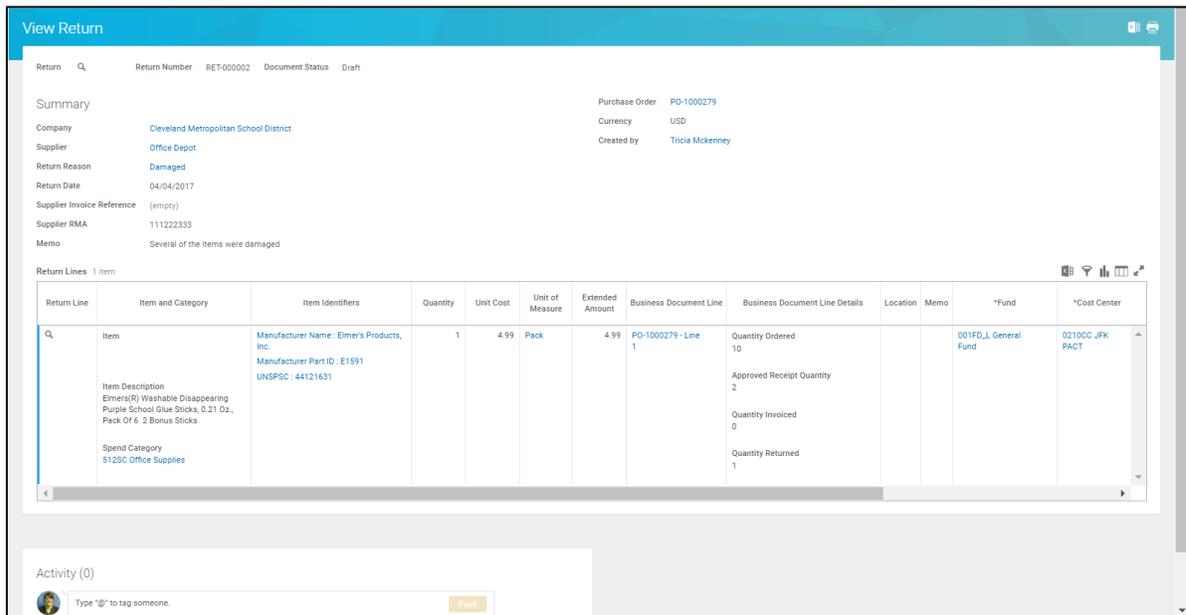
8. Review the displayed information, and be sure to record the PO number to be able to access the Return order.
   ___Note:___ Use the **My Recent Purchase Orders** worklet to the purchase orders with the Return order.

Discard Changes

Discard Changes?

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

[Discard] [Continue]

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

Result:

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

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