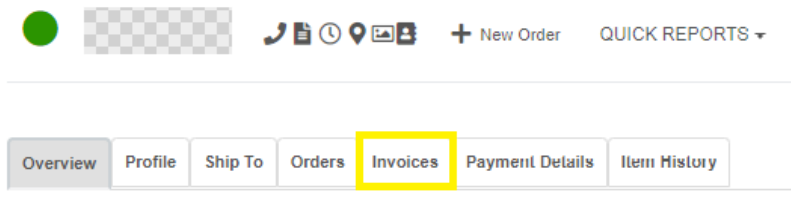


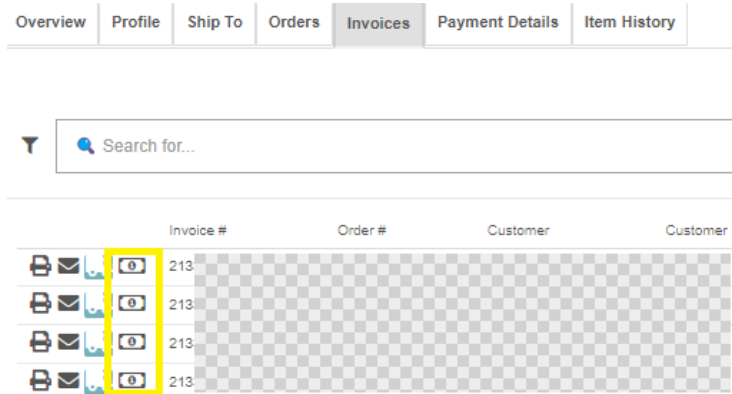
Submitting a Claim

From the CRM

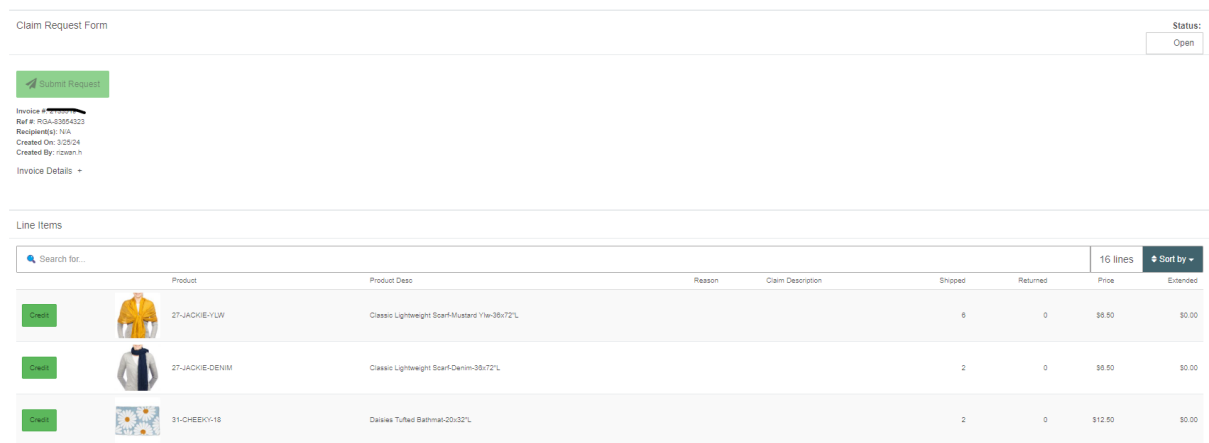
1. Look up your customer from the CRM module
2. Click on you customer to open up the customer page
3. Click on the Invoices tab



4. Click on the Dollar Bill icon beside the invoice you want to submit the claim for



5. From the claims form, click on the CREDIT button next to the item you want to submit the claim for

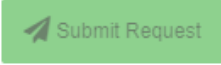


6. A pop up will appear
 - a. Enter quantity to credit
 - b. Select the reason for the credit
 - c. Enter in a description of the issue
 - d. If you have an image to upload, do it now (this is optional)
 - e. Click on Save
7. Repeat step 6 for each item that needs a credit for the invoice

Submitting a Claim

- Once you have created a credit for each item, click on the SUBMIT REQUEST button at the top of the page

Claim Request Form





Invoice #: ██████████
Ref #: RGA-83854323
Recipient(s): N/A
Created On: 3/25/24
Created By: rizwan.h

Invoice Details +

- You will get a summary of the claim. If everything is correct, click on SUBMIT, otherwise click on CANCEL and make your changes

Submit Claim Request

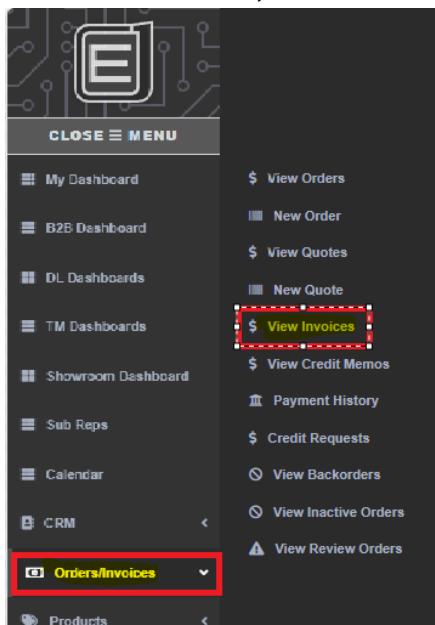
Are you sure you would like to submit this claim request?
Line #1; SKU: 27-JACKIE-YLW; Qty: 1; Customer Refusal; 1;

- Your claim is completed

From List of Invoices

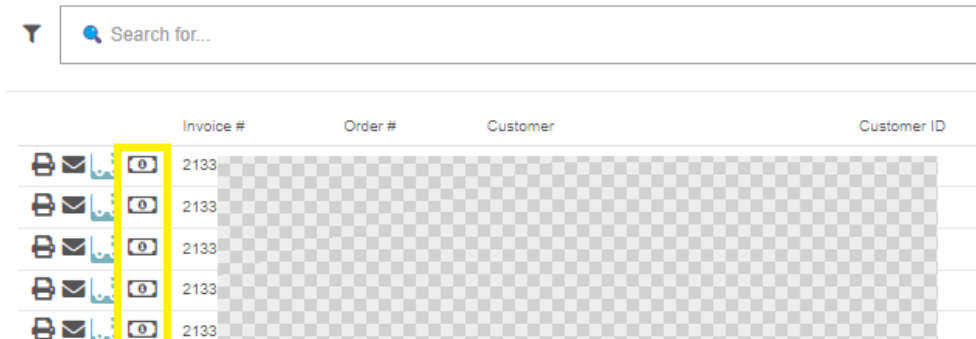
- From the side menu, select **Orders/Invoices > View Invoices**



- Search for your customer or invoice number

Submitting a Claim

- Click on the Dollar Bill icon beside the invoice you want to submit the claim for
View Invoices



- Follow the same steps as listed above

Notes

- If you can need to remove an item from the claim, go back into that item, and change the quantity to 0, that will delete that item from the claim.

Delete credit line

Are you sure?



- You cannot submit a claim that is older than 30 days. You can either contact your CSR or email gifts@abbottcollection.com

Claim Request

This invoice is more than 30 days old. To submit a claim please contact customer service for review



Contact Customer Service

Contact Customer Service



Cancel

Cancel claim request

- Customers have full access to submit claims when logged into abbottcollection.com – there is a FAQ available for customers to access on the website