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

Overview	v Profi	e Ship To	o Orde	rs Invoid	ces Payment Del	ails Item Hi	istory			
000		00								
	htho Γ	ollar B	ill ioor	booid	a tha invoice	vouwar	ot to a			
				Desid		you wur	11 10 3	submit	t the claim f	or
Overview	Profile	Ship To	Orders	Invoices	Payment Details	Item History		submit	t the claim f	or
	Profile Search fo	Ship To	Orders	Invoices	Payment Details	Item History		submit	t the claim f	or
	Profile Search fo	Ship To	Orders	Invoices	Payment Details	Item History	stomer ID	submit	t the claim f	or
	Profile Search fo	Ship To T Noice # 13	Orders	Invoices	Payment Details	Item History Cur	stomer ID	submit	t the claim f	or
	Profile Search fo	Ship To	Orders	Invoices	Payment Details Customer	Item History Cur	stomer ID	submit	t the claim f	or

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

Claim Request Form								Status: Open
Submit Request								
Line Items								
Search for							16 lines	¢ Sort by →
	Product	Product Deso	Reason	Claim Description	Shipped	Returned	Price	Extended
Credit	27-JACKIE-YLW	Classic Lightweight Scarf-Mustard Ylw-38x72"L			6	0	\$8.50	\$0.00
Credit	27-JACKIE-DENIM	Classic Lightweight Scarf-Denim-38x72"L			2	0	\$8.50	\$0.00
Credit	31-CHEEKY-18	Dalsies Tufked Bathmat-20x32"L			2	0	\$12.50	\$0.00

- 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

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

Claim Request Form		
4		
🚀 Submit Request		
Invoice #: 200540		
Ref #: RGA-83854323		
Recipient(s): N/A		
Created On: 3/25/24		
Created By: rizwan.h		
Invoice Details +		

9. 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;

Submit

Cancel

10. Your claim is completed

From List of Invoices

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



2. Search for your customer or invoice number

Submitting a Claim

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

T Q S	Search for								
		Invoice #	Order #	Customer		Customer ID			
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₽⊠⊾	•	2133							
₽⊠Ц	0	2133							
₽⊠Ц	0	2133							
₽⊠Ц	0	2133			8888888888				

4. 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

