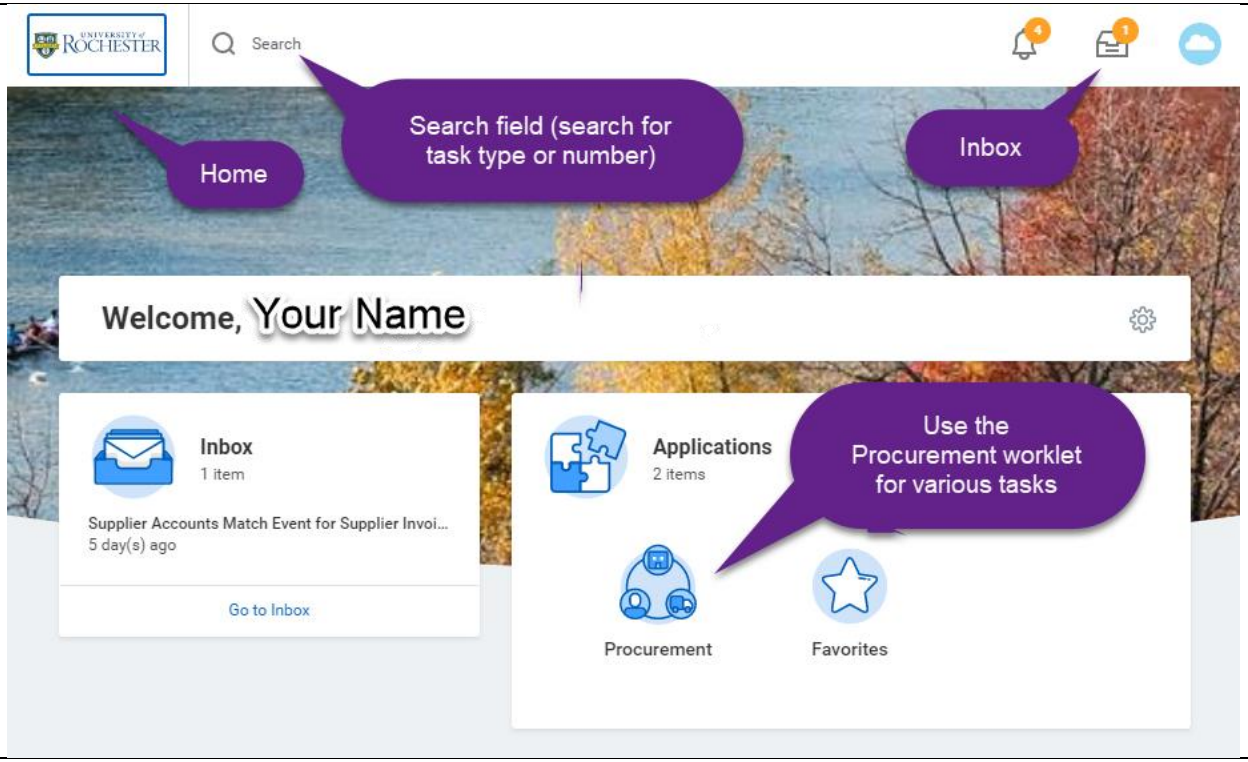
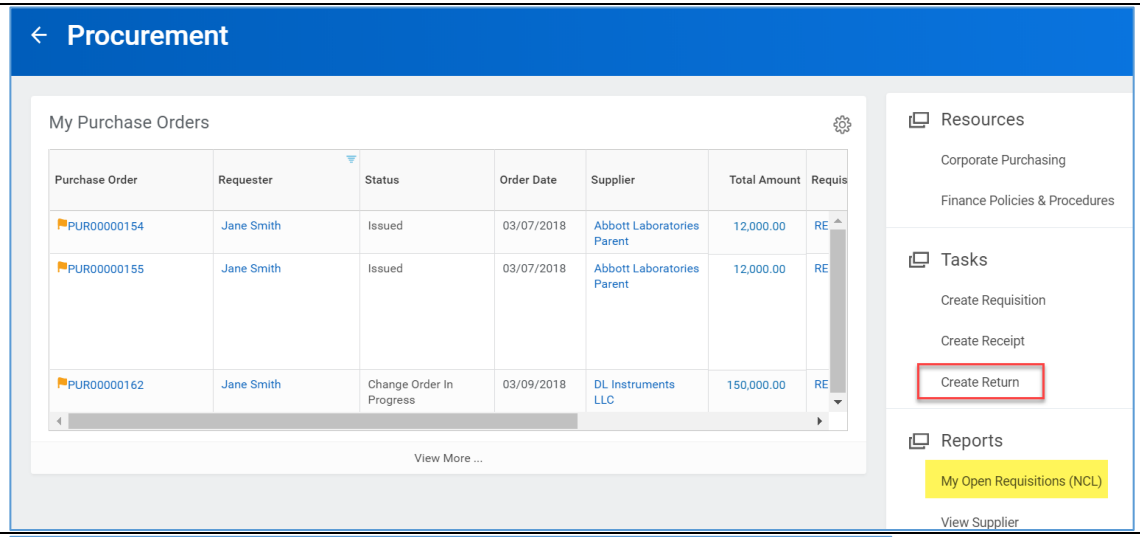
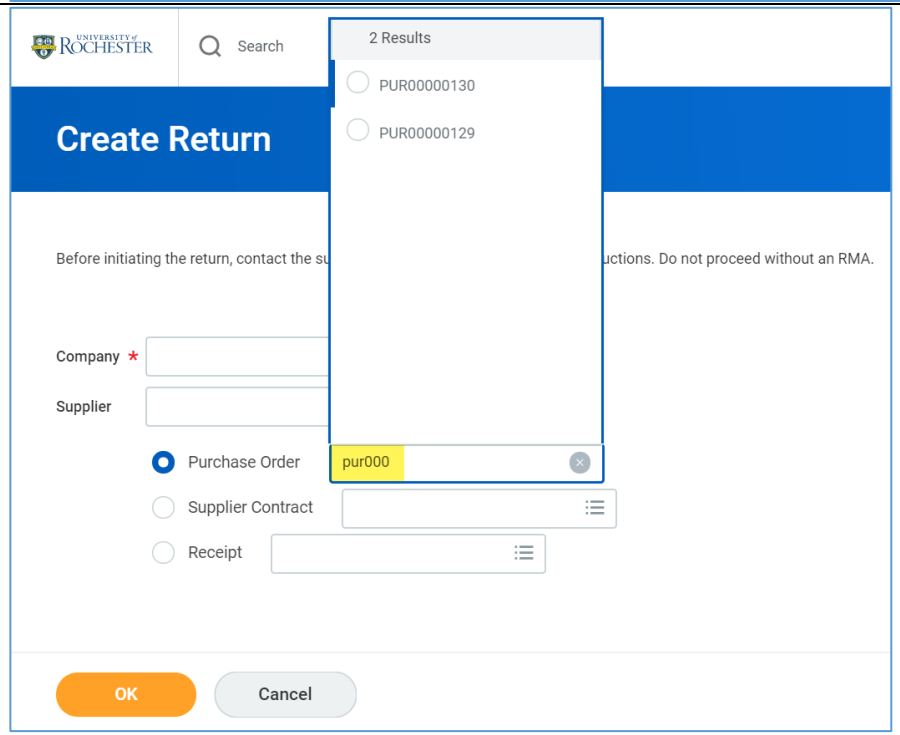
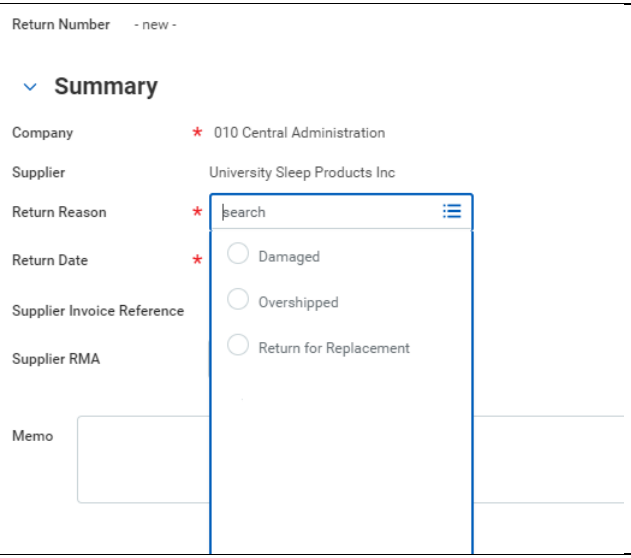
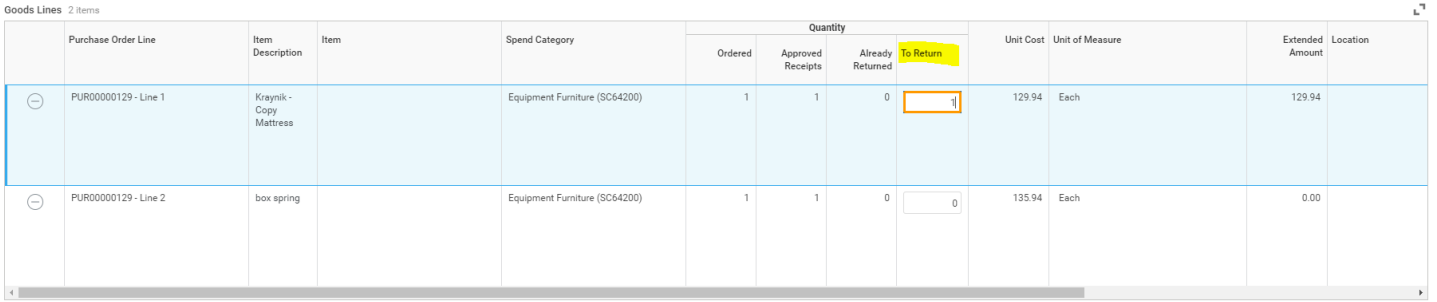
UR Procurement – Create Return

Implementation Tenant - https://wd5-impl.workday.com/rochester3

Instructions	Details and Screenshots
Home page: • Use the UR logo to return to this Home screen • Use the Search field with keywords • Use the Inbox for Workday messages • Use the Procurement worklet for frequently used tasks and reports ○ Create Return	
Rules	• Before initiating the return, contact the supplier for a RMA Number and return instructions. **Do not proceed without an RMA.** • A return can only be created if there are one or more receipts. • A return can only be created for goods lines.

Instructions	Details and Screenshots
From the Procurement dashboard • Select <**Create Return**> and then search for order that needs to be returned ○ Can also use the My Open Requisitions to review a list of orders and create a receipt from the purchase order, this will be shown later in this document.	
After selecting <**Create Return**> search by purchase order, supplier contract, or Receipt as indicated. • Select the Purchase Order radio button and search for the PO number starting with PURxxxxxxx • Or, select the Supplier Contract radio button and search starting with SPCxxxxxxxx • Or, select the Receipt radio button and search starting with RCTxxxxxxxx • Select <**OK**>	

Instructions	Details and Screenshots
• Enter the Return Reason & Date • Enter the Supplier Invoice Reference • Enter the Supplier RMA • Scroll down to the line level details	
• Enter the To Return quantity for the appropriate line items	
When ready, select <**Submit**> button.	
Then follow the Suppliers return instructions.	