



**REPLACEMENT COMPONENTS  
PARTS OPERATION MANUAL**  
POM: 24-501

**Totaline Return Material Request**

Originator: Luke Johnson

Issue Date: December 31, 2023  
Effective Date: January 1, 2024  
Supersedes Date: January 1, 2023

**APPLICABLE BUSINESS:**  
Replacement Components

## Highlight of Changes:

- No Changes

All RC Return Material (RM) requests are required to be submitted through RC Community, which can be found under the Products tab on HVAC Partners. Please submit only one request per invoice.

All Return Material requests must receive authorization from RC before physically shipping any product for return.

### **Unauthorized returns will be shipped back to customer – Freight Collect.**

Following is a matrix that provides guidance of what information is required for each type of Return Material (RM) Request.

#### **Important Notes:**

- Any RM requests for New and Unused, Customer Cancellations and Customer Error must meet the \$200 minimum (in aggregate of the invoice) requirement; otherwise, RM will be rejected.
- RM requests for New and Unused, Customer Cancellations and Customer Error must be in new and unused condition and in its original packaging.
- For damage caused during transit, you will need to file a Freight Claim with the Freight Carrier; RM requests for Freight Damage will be rejected
- Failure to supply the information listed in the following matrix may result in rejection of your Return Material Request.

<b>Reason Code Description</b>	<b>In addition to the RM Requestor's email address, include the following information in your Comments/Notes on your RM request:</b>	<b>Restocking Fee</b>
<b>New &amp; Unused / Surplus</b>	<ul style="list-style-type: none"> <li>Any information you may have to support your return</li> </ul>	<b>Yes</b>
<b>Miss-Shipment / Short Shipment</b>	<ul style="list-style-type: none"> <li>Include the part number that was ordered/invoiced and the part number that was received (if known)</li> <li>If relevant, include information pertaining to incorrect labeling</li> <li>Any information you may have to support your return</li> </ul>	<b>No</b>
<b>Damaged / Defective</b>	<ul style="list-style-type: none"> <li>Provide detailed information of what the damage/defect is (i.e., bolts missing; blade bent; etc.)</li> <li>If relevant to a special PMB issue, include the PMB #</li> <li>Any information you may have to support your return</li> <li>For requests over \$200, pictures of the damage/defective item need to be attached and uploaded into the Sales Force case. <b><i>Note: If pictures are not received within 5 days, your RM may be rejected.</i></b></li> </ul>	<b>No</b>
<b>PIC / Catalog Error</b>	<ul style="list-style-type: none"> <li>Provide Model and Serial Number of the Unit with the failed part</li> <li>Any information you may have to support your return, including a Case # if relevant to this return</li> </ul>	<b>No</b>
<b>Customer Cancelled</b>	<ul style="list-style-type: none"> <li>Any information you may have to support your return (i.e., customer no longer needs; part no longer needed as unit was replaced; etc.)</li> </ul>	<b>Yes</b>
<b>Customer Error</b>	<ul style="list-style-type: none"> <li>Any information you may have to support your return</li> </ul>	<b>Yes</b>
<b>Customer Service Error</b>	<ul style="list-style-type: none"> <li>Identify if RC error or if an error was made at your distributorship</li> <li>Any information you may have to support your return, including a Case # if relevant to this return</li> </ul>	<b>TBD</b>
<b>Core Return</b>	<ul style="list-style-type: none"> <li>Used for a Commercial Applied VFD core return/rebate only; any questions regarding this type of a return should be directed to your Customer Service Representative</li> </ul>	<b>TBD</b>



**1. Typical reasons for Returned Material Request:**

- Miss-shipments (overages or incorrect part shipped on order)
- Miss-shipment – customer didn't order shipment (i.e. miss-tagged address label)
- Concealed damaged material (not related to freight damage)
- Other parts which have failed (per SMB's) which RC or Service Engineering has requested to be returned for inspection, statistical analysis, or supplier follow-up purposes.
- Customer Order Error
- New and unused returns
- Defective Part
- Rebalance Program (See POM 502)

**Requests for returns are reviewed and, in some cases, rejected**

- a. RC may not accept any parts back for return that fall into any of the following categories:
  1. Obsolete
  2. Superseded
  3. Special order or non-stock parts
  4. Hazardous Materials. \*
  5. Parts with a shelf life (gaskets, etc.)
  6. Parts in Less than Standard Pack
  7. Return requests for parts that are less than \$200 per invoice and were not due to an RC error.

**\*Note:** There is a cost associated with the disposal of hazardous materials and customers will be billed back for any disposal costs/fees incurred by RC for any unauthorized hazardous parts returned.

- b. Requests for new and unused parts that are eligible for return will be accepted up to sixty (60) days from the original invoice date with a 25% restocking charge. Beyond sixty (60) days, return authorization will be issued at the discretion of RC.
- c. Additionally, RC Materials group reserves the right not to authorize the return of parts that are shipped direct from RC vendors, non-stock items or parts that were in stock at the time of order and shipped over 60 days from the date of invoice.

**Returns must be in a new and unused condition (available for resale):**

All Returns must be received in new and unused condition which includes original packaging. If material is not received in a new and unused condition, the request for credit will be denied and product will be returned to customer at their expense.

The RM Coordinator in Customer Service will communicate to the original RM requestor.

*Any requests for credit other than the reasons listed above, you should contact RC Customer Service Department for assistance.*



Note: New & Unused Return Material Requests under \$200 (in aggregate of the invoice) will be rejected.

All other Approved Return Material Requests (ex. damaged, defective) under \$200 will be approved as field scrap and should not be returned to RC unless requested by the RM Coordinator in your official RM document.

### Defective Part Returns

When requesting authorization for the return of a defective part, a detailed description of the defect and / or symptoms must be included. Failure to do so may result in rejection of return authorization or the issuance of credit.

### Circuit Boards

- A. To be considered for credit on a “new and unused” return, all circuit boards must be returned in the original anti-static packaging and with the protective seal intact.
- B. Once the seal is broken, RC cannot put these back to stock because:
  - I. We cannot determine what handling was done.
  - II. We cannot determine if the part experienced any exposure to static.

Therefore, if the bag is opened, the part cannot be considered new and unused, and no credit will be issued.

### ACCEPTABLE



### UNACCEPTABLE:



### Refused shipments and other unauthorized returns:

If the customer refuses a shipment or returns any unauthorized parts to RC or an RC Vendor, the product will be returned freight collect and **NO** credit will be issued.



## Returning the Shipment:

- A. All materials authorized for return should be sent to RC in one shipment. Return material requests will be closed once the material is received by RC even if the entire amount authorized on the RM has not been received.
- B. Authorized returns must be received at the correct return warehouse within **45 days** of the authorization date, or the RM will be void. Parts returned after the RM is void will be returned to the customer freight collect.
- C. All items being returned that are not a result of a Carrier error must be shipped "F.O.B. Destination". Collect freight charges on any shipments received (other than cases where Carrier was at error) will be charged back to the Distributor. When returning material due to a Carrier error, do *not* send by air freight. Please utilize the appropriate return material freight method for your returns. *See routing instructions at the end of this section.*
- D. An entire parts delivery to be returned due to a miss shipment (did not order) requires a Call Tag. Contact RC Customer Service at (315) 432-7278 who will provide pickup instructions.
- E. All material must be properly packaged to ensure that it will not be damaged during shipment. Tag the outside of each carton clearly with the RM # provided; and safeguard the integrity of the packaging to ensure a "New and Unused" Status. (See reference above).
- F. Ship goods to the appropriate facility as marked in the upper right corner of the RM form. Parts shipped to the wrong designated location will be returned to the customer "Freight Collect" and the RM will be void.
- G. If there is a determination that product will need to be returned directly to our supplier; you will receive a copy of an FSO. (Factory Shipping Order) along with a Return Material authorization form. The FSO is to be used as the packing slip and is to be placed in the carton of material being returned to the supplier.
- H. When shipping parts with the FSO, send RC Accounting a copy of the Bill of Lading and a copy of the RM as proof that the parts have been shipped back. Once shipping information has been received by RC Accounting, your credit can be processed (unless credit pending upon inspection of part returned). Failure to send proof of delivery will delay processing of the credit memo.

## RM Status

*Please refer to your case in the Sales Force Community for the RM paperwork.*

***If you have any questions then please contact your RC Customer Service Representative at (315) 432-7278.***

## Credit Reductions

The following items will reduce the amount of allowable credit:

- A. "Collect" in-bound freight charges (except in the case of Carrier errors).



- B. The replacement value of parts which fail to pass inspection or are broken, missing, damaged, or worn beyond economical repair.
- C. Restocking charges will be assessed at 25% of invoice value. Restocking charges are not assessed on returns due to RC errors.
- D. Any freight charges billed on the original invoice will be reimbursed if the return is due to a Carrier error.

### Exceptions

Any request for exceptions to this procedure shall be referred to the Accounting Department in Syracuse, NY for an exception review. Customer Service will coordinate the customer request with the Accounting Department Analyst and Accounting Manager.

**Freight Routing General Instructions are to be utilized when Carrier-RC is responsible for freight charges.**

### Authorized returns to CHATTANOOGA, TN

#### Please use:

A. **PARCEL:** Use FedEx when the maximum weight per piece is 150 lbs. and the total shipment weight is a maximum 150 lbs. (more than one piece). The length cannot exceed 108 inches, and the combined length and girth must be a maximum 165 inches [L+2W+2H]. The shipment must be non-palletized and individually packaged and labeled. FedEx is to be utilized on ground packages only. Send freight collect to the Carrier location. You do not need the Carrier Corp FedEx receiver account number because that number is scanned upon delivery to Carrier Corp.

**\*\*Note – These instructions do not apply to New and Unused Compressors – Which must be returned via LTL Delivery Services. – See POM 402**

B. WEIGHT AND SIZE LIMIT - A single LTL shipment cannot exceed 12,000 lbs. in weight or occupy the full visible capacity of a trailer (to the extent that no other freight can be loaded in the trailer). If a single shipment exceeds one or both limits, contact Carrier's corporate logistics department at 315-432-6217 for truckload routing instructions.

C. Carrier's authorized transportation routings must be used and that any usage of a non-authorized provider would result in excess freight charges being charged back to the distributor.

D. Less Than Truckload (LTL) - See Listing (per Carrier Transportation & Logistics department). CHATTANOOGA LTL is listed below:



ORIGIN STATE	DESTINATION CITY	DESTINATION STATE	DESTINATION ZIP	LTL PROVIDER NAME:	LTL PROVIDER SCAC:
AB	CHATTANOOGA	TN	37419	Saia Motor Freight Line	SAIA
AK	CHATTANOOGA	TN	37419	Saia Motor Freight Line	SAIA
AL	CHATTANOOGA	TN	37419	Southeastern Freight Lines	SEFL
AR	CHATTANOOGA	TN	37419	FedEx Freight	FXNL
AZ	CHATTANOOGA	TN	37419	FedEx Freight	FXNL
BC	CHATTANOOGA	TN	37419	Saia Motor Freight Line	SAIA
CA	CHATTANOOGA	TN	37419	Saia Motor Freight Line	SAIA
CO	CHATTANOOGA	TN	37419	Saia Motor Freight Line	SAIA
CT	CHATTANOOGA	TN	37419	Saia Motor Freight Line	SAIA
DC	CHATTANOOGA	TN	37419	Saia Motor Freight Line	SAIA
DE	CHATTANOOGA	TN	37419	Saia Motor Freight Line	SAIA
FL	CHATTANOOGA	TN	37419	Southeastern Freight Lines	SEFL
GA	CHATTANOOGA	TN	37419	Southeastern Freight Lines	SEFL
HI	CHATTANOOGA	TN	37419	Saia Motor Freight Line	SAIA
IA	CHATTANOOGA	TN	37419	FedEx Freight	FXNL
ID	CHATTANOOGA	TN	37419	FedEx Freight	FXNL
IL	CHATTANOOGA	TN	37419	Dayton Freight	DAFG
IN	CHATTANOOGA	TN	37419	Dayton Freight	DAFG
KS	CHATTANOOGA	TN	37419	Saia Motor Freight Line	SAIA
KY	CHATTANOOGA	TN	37419	Averitt Express	AVRT
LA	CHATTANOOGA	TN	37419	Southeastern Freight Lines	SEFL
MA	CHATTANOOGA	TN	37419	Saia Motor Freight Line	SAIA
MB	CHATTANOOGA	TN	37419	Saia Motor Freight Line	SAIA
MD	CHATTANOOGA	TN	37419	Saia Motor Freight Line	SAIA
ME	CHATTANOOGA	TN	37419	Saia Motor Freight Line	SAIA
MI	CHATTANOOGA	TN	37419	Dayton Freight	DAFG
MN	CHATTANOOGA	TN	37419	Dayton Freight	DAFG
MO	CHATTANOOGA	TN	37419	Dayton Freight	DAFG
MS	CHATTANOOGA	TN	37419	Southeastern Freight Lines	SEFL
MT	CHATTANOOGA	TN	37419	Saia Motor Freight Line	SAIA
NB	CHATTANOOGA	TN	37419	Saia Motor Freight Line	SAIA
NC	CHATTANOOGA	TN	37419	FedEx Freight	FXNL
ND	CHATTANOOGA	TN	37419	Saia Motor Freight Line	SAIA
NE	CHATTANOOGA	TN	37419	Saia Motor Freight Line	SAIA
NH	CHATTANOOGA	TN	37419	FedEx Freight	FXNL
NJ	CHATTANOOGA	TN	37419	Saia Motor Freight Line	SAIA
NM	CHATTANOOGA	TN	37419	Saia Motor Freight Line	SAIA
NS	CHATTANOOGA	TN	37419	Saia Motor Freight Line	SAIA
NT	CHATTANOOGA	TN	37419	Saia Motor Freight Line	SAIA
NV	CHATTANOOGA	TN	37419	FedEx Freight	FXNL





NY	CHATTANOOGA	TN	37419	Saia Motor Freight Line	SAIA
OH	CHATTANOOGA	TN	37419	Dayton Freight	DAFG
OK	CHATTANOOGA	TN	37419	Southeastern Freight Lines	SEFL
ON	CHATTANOOGA	TN	37419	Saia Motor Freight Line	SAIA
OR	CHATTANOOGA	TN	37419	FedEx Freight	FXNL
PA	CHATTANOOGA	TN	37419	Saia Motor Freight Line	SAIA
PE	CHATTANOOGA	TN	37419	Saia Motor Freight Line	SAIA
QC	CHATTANOOGA	TN	37419	Saia Motor Freight Line	SAIA
RI	CHATTANOOGA	TN	37419	Saia Motor Freight Line	SAIA
SC	CHATTANOOGA	TN	37419	Southeastern Freight Lines	SEFL
SD	CHATTANOOGA	TN	37419	FedEx Freight	FXNL
SK	CHATTANOOGA	TN	37419	Saia Motor Freight Line	SAIA
TN	CHATTANOOGA	TN	37419	Saia Motor Freight Line	SAIA
TX	CHATTANOOGA	TN	37419	Saia Motor Freight Line	SAIA
UT	CHATTANOOGA	TN	37419	Saia Motor Freight Line	SAIA
VA	CHATTANOOGA	TN	37419	Southeastern Freight Lines	SEFL
VT	CHATTANOOGA	TN	37419	Saia Motor Freight Line	SAIA
WA	CHATTANOOGA	TN	37419	Saia Motor Freight Line	SAIA
WI	CHATTANOOGA	TN	37419	Dayton Freight	DAFG
WV	CHATTANOOGA	TN	37419	FedEx Freight	FXNL
WY	CHATTANOOGA	TN	37419	Saia Motor Freight Line	SAIA
YT	CHATTANOOGA	TN	37419	Saia Motor Freight Line	SAIA

