



RC Return Materials:

RM Review

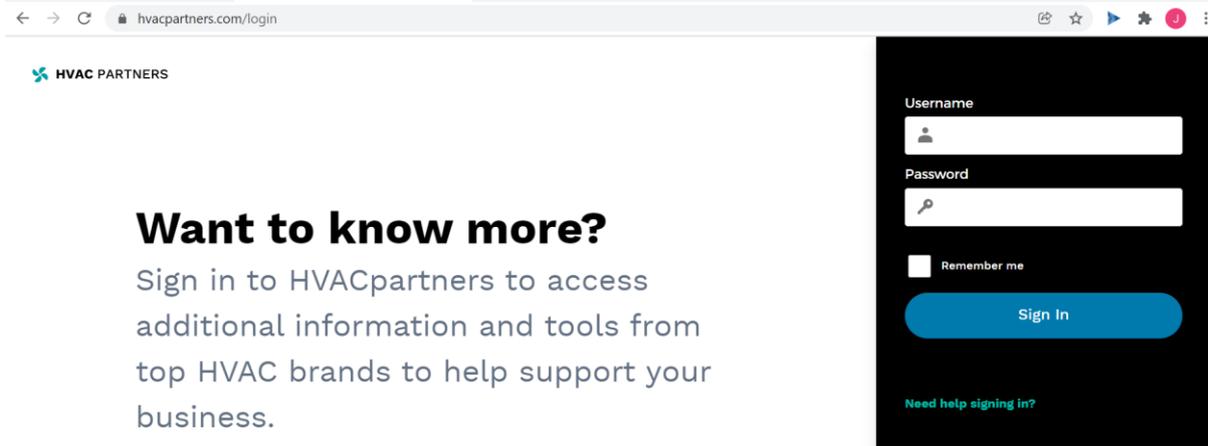
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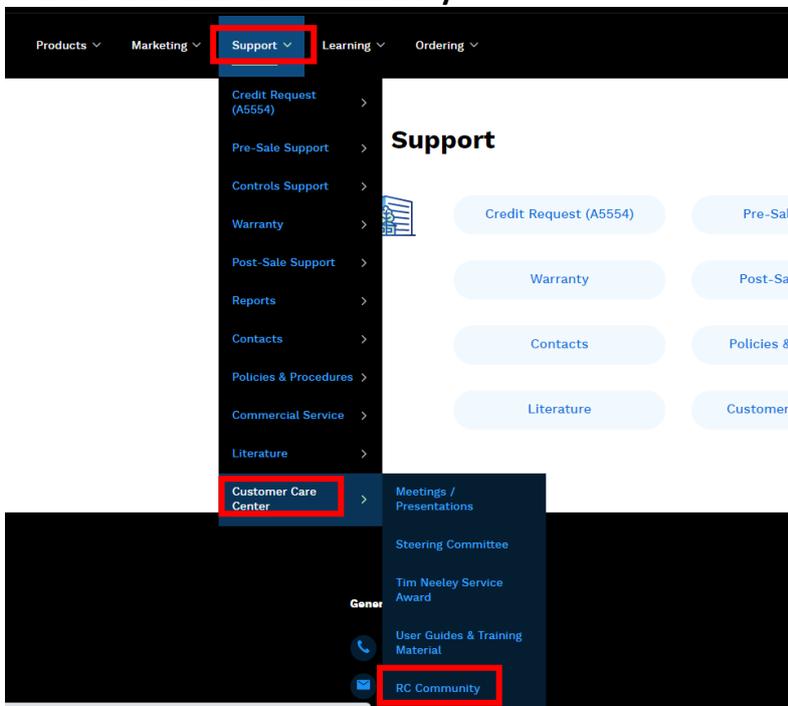
Step by step guide to create a Return Material request through the HVAC portal:

Login & Actions

Step 1: Login to the HVAC Partners Portal using the [Link](#)

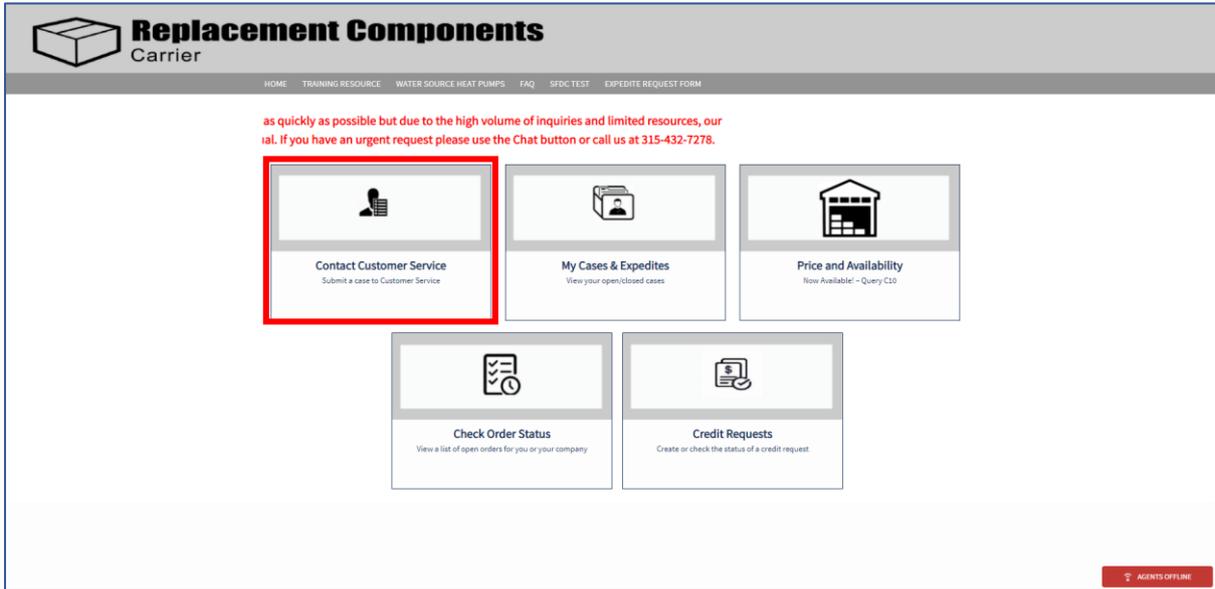


Step 2: On the landing page of HVAC Portal, navigate to “Support”, “Customer Care Center” and then “RC Community”

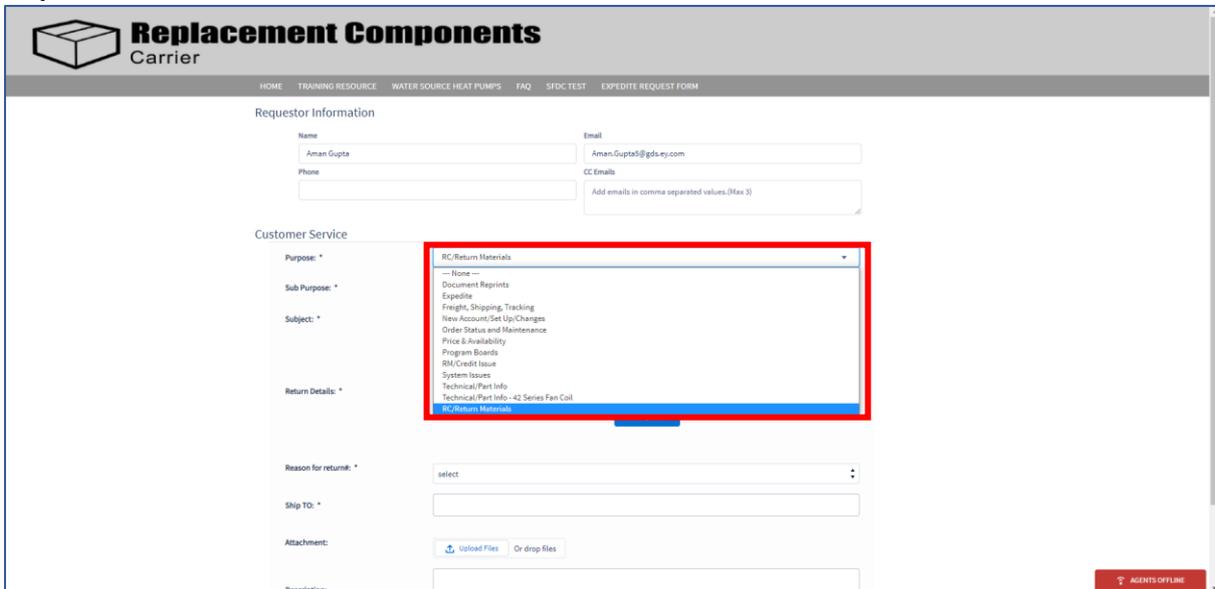




Step 3: Previous step will launch the RC Community landing page for different types of RC related services. To proceed with the creation of a Return Material request, click on the “Contact Customer Service” tile



Step 4: On the Customer Service page, select “RC/Return Materials” under the “Purpose” field. This will change the form layout to the standard intake form for placing return requests



Please note: The Ship To number needs to be verified for accuracy.



Step 5: Add in a subject line and select a Reason for Return. Once you have selected the reason, you will be prompted to enter in your PO, Invoice, and/or Part number. Basis the type of return request, fill up the remaining fields as necessary. Please note that on updating the Customer PO number and Customer Number, the form will auto fetch the details of the PO from the backend and present you with a list of items to choose from for a return request once you click on “Find my Order” button.

Customer Service

Purpose: *

Sub Purpose: *

Subject: *

Reason for return#: *

Return Details: *

Ship TO Number: *

Attachment:

Description:

Distributor Customer:

select

New and Unused

Mis-Shipment

Defective

Damaged

Epic/Catalog Error

Core Credit

Customer Cancelled

Customer Error

RCD Customer Service Error

Recall

The list of reason codes as associated mandatory fields are as follows:

Reason Codes	Additional Mandatory fields
New and Unused	N/A
Mis-Shipment	Sub-reason is mandatory: Wrong Part, No invoice/no credit and Overage
Defective	N/A
Damaged	N/A
Epic/Catalog Error	Serial # and Model # required
Core Credit	Part Name Received and Qty Received (Invoice level or line-item level)
Customer Cancelled	N/A
Customer Error	N/A
RCD Customer Service Error	N/A
Recall	PMB# and Additional Info Part Name/ Quantity

Please note: The fields marked with *(Asterisk) are mandatory for all reason codes



Step 6: Fill up the details on the form as necessary and click on Submit case

Customer Service

Purpose: * RC/Return Materials

Sub Purpose: * RC/Return Materials

Subject: *

Reason for return#: * New and Unused

* Customer PO Number * Customer Number

Return Details: *

[Find My Order](#)

Ship TO Number: *

Customer Type: * CMA-CCS

Work Order Number #:

Attachment: [Upload Files](#) Or drop files

Description:

Distributor Customer:

[Create Case](#)

Note: Customer Type can be selected from the list available within the drop down before clicking on “Create Case”:

For example:

[Find My Order](#)

Ship TO Number: *

Customer Type: *

Work Order Number #:

Attachment:

Description:

Distributor Customer:

[Create Case](#)

Customer Type dropdown list:

- CMA-CCS
- select
- CBP
- International
- ICP
- CCRP / United
- CMA-CCS**
- CMA - Contractors
- National
- Nuclear



Required Field	Definition
Customer PO	The Purchase order number you submitted to RC when you ordered the part.
Customer Number	Automatically populated based on login, your assigned RC parent code (sold to).
Ship To Number	Your assigned child code (ship to) specific to each location.
Customer Type	Examples: CBP – represent Carrier Bryant Payne distributors International is RC Customers not including Canada ICP – International Comfort Product distributors CCRP / United – Refrigeration Customers CMA – CCS – Carrier Commercial Services CMA – Contractors – Commercial Contractors National Accounts Nuclear
Work Order Number	If you have a work order number associated with the purchase order you can provide here for reference on the RM paperwork.
Distributor Customer	If you have a work order number associated with the purchase order you can provide here for reference.

Pop-up notification once the case has been created with the case number:





How to Navigate to Case Attachments and Status:

Step 1: On the RC landing page, click on “My Cases and Expedites”

Replacement Components
Carrier

HOME TRAINING RESOURCE WATER SOURCE HEAT PUMPS FAQ SFDC TEST EXPEDITE REQUEST FORM

We are working to resolve your concern as quickly as possible but due to the high volume of inquiries and limited resources, our response time may take longer than usual. If you have an urgent request please use the Chat button or call us at 315-432-7278.

- Contact Customer Service
Submit a case to Customer Service
- My Cases & Expedites**
View your open/closed cases
- Price and Availability
Now Available! - Query C10
- Check Order Status
View a list of open orders for you or your company
- Credit Requests
Create or check the status of a credit request

AGENTS OFFLINE

Step 2: Click on the case number you want to view the attachments of

Replacement Components
Carrier

HOME TRAINING RESOURCE WATER SOURCE HEAT PUMPS FAQ SFDC TEST EXPEDITE REQUEST FORM

OPEN CASES CLOSED CASES EXPEDITES OPEN COMPANY CASES CLOSED COMPANY CASES

Show 10 entries Search:

Case Number	Account Name	Subject	Status	Priority	Purpose	Sub Purpose	Owner	Date/Time Opened
01318014	CARRIER CORPORATION D/B/A Do not delete	Defective	Open	Medium	RC/Return Materials	RC/Return Materials		2021-11-08 11:11:00
01318013	CARRIER CORPORATION D/B/A Do not delete	Return To vendor	Open	Medium	RC/Return Materials	RC/Return Materials		2021-11-08 11:11:00
01318012	CARRIER CORPORATION D/B/A Do not delete	Rejected Case under dollar	Open	Medium	RC/Return Materials	RC/Return Materials		2021-11-08 11:11:00
01318011	CARRIER CORPORATION D/B/A Do not delete	No invoice no credit	Open	Medium	RC/Return Materials	RC/Return Materials		2021-11-08 11:11:00
01318010	CARRIER CORPORATION D/B/A Do not delete	Wrong Part Testing 1	Open	Medium	RC/Return Materials	RC/Return Materials		2021-11-08 11:11:00
01317224	CARRIER CORPORATION D/B/A Do not delete	Test	Open	Medium	RC/Return Materials	RC/Return Materials		2021-10-12 16:10:00
01318009	CARRIER CORPORATION D/B/A Do not delete	RC TESTING LONG LINE ITEMS	Open	Medium	RC/Return Materials	RC/Return Materials		2021-11-08 11:11:00
01318008	CARRIER CORPORATION D/B/A Do not delete	Test submission	Open	Medium	RC/Return Materials	RC/Return Materials		2021-11-08 10:11:00
01318007	CARRIER CORPORATION D/B/A Do not delete	damaged	Re-Open	Medium	RC/Return Materials	RC/Return Materials		2021-11-08 09:11:00
01318006	CARRIER CORPORATION D/B/A Do not delete	mis shipment	Open	Medium	RC/Return Materials	RC/Return Materials		2021-11-08 06:11:00

Showing 1 to 10 of 115 entries Previous 1 2 3 4 5 ... 12 Next

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Step 3: Under the RM Line Items section, you will find the RM Number, line item disposition status, and the RMA Form to download

Case Number 01318555 Created Date 11/19/2021, 10:39 AM EST

Distributor Webinar : Closed

DETAILS COMMENTS EMAILS EXPEDITES ATTACH A FILE RM LINE ITEMS

+ CASE INFORMATION

Case Number 01318555	Return Reason New and Unused
Customer PO Number 725395	Sub Reason
Invoice Number 15157174	RM Number RM12375

+ LINE ITEMS

PartName	Description	Ordered Quantity	ReturnedQuantity	Disposition Status	Comments
EF 34CW 246	VALVE GAS	1	1	Return to Stock	Please return to KENKO
EB-STATE3LTP-02	ECOBEE3 LITE PRO SMART ...	32	2	Field Scrap	Credit to be issued

+ RELATED DOCUMENTS

FILE NAME	DOWNLOAD
Return Materials - Copy of Process Flow.jpg	Download
RM Form	Download



Communication:

The below email will be sent to the customers once the disposition has been completed

****This is an auto-generated email, do not reply as the mailbox is unmonitored****

Dear Valued Customer,

In reference to a return material request submitted by you, the following resolution has been determined:

RM Number	Part Name	Quantity Ordered	Quantity Returned	Disposition Status	Comments
RM54101	06DM313FCC367ARP	2	1	Reject	Rejected - under established \$ for return
RM54101	06DA660180	12	1	Reject	Rejected - under established \$ for return
RM1	PartA	1	1	Reject	Insufficient pictures
RM1	PartU	1	1	Reject	Non-stock part, model / unit specific

The above table is a summary of the part number(s) and respective quantities that have been approved or rejected for return. **Attached to your Case Number referenced in the subject line above, you will find a Return Materials Form (RM Form) with additional details regarding your request.**

UNAUTHORIZED RETURNS

Please be sure to only return the part(s) and quantities identified on the RM Form. Any other parts returned that are not identified on the form as approved for return will be considered an unauthorized return; unauthorized returned parts will not receive credit, nor will they be returned to you.

RETURNS TO OUR VENDORS

For items that are coded as **RTV (RETURN TO VENDOR)**, you will find additional Paperwork attached to your Case to include with your shipment to our Vendor. In order to obtain credit for any returns to one of our vendors, you will need to provide the following paperwork to rcaccounting@carrier.com (or fax 860-353-6059):

- Proof of Delivery, in the form of a SIGNED BILL OF LADING by the Consignee, along with
- A copy of the RM Form



SHIPPING INSTRUCTIONS

All items approved for return should be shipped to the address identified on the documents attached to your case. **All shipments should include a copy of the RM Form** attached to your case. Shipping instructions can be found on the RM Form (or Return to Vendor Factory Shipping Order) attached to your case:

- Freight to be paid by Customer: you will be responsible for all shipment charges.
- Frt 3rd party bill to RCD: We will pay for the return freight charges; please refer to this year's POM xx-501 for a complete listing of approved LTL Carriers. Carrier's authorized transportation routings must be used and any usage of a non-authorized provider would result in excess freight charges being charged back to the distributor.

Note: do not use standard UPS for compressor returns. Please be sure to reference the Return Material Authorization "RM" number on your shipment label and include a copy of the Return Material Form with your shipment.

RESTOCKING FEES

Also, please remember that you may also be subject to a restocking fee. This fee will be assessed based on the reason for the return (i.e., New and Unused, Customer Error, Customer Cancelled, etc.).

If you have any questions, please call RC Customer Service at 315.432.7278 and reference your Case Number.

Thank you and Best Regards,

RC Customer Service
Customer Care Center