Return to Supplier

Table of Contents

This Job Aid covers the process of initiating the RTV (return-to-vendor) process within the upgraded ONEPeralta system.

ONE | SYSTEM FUTURE PERALTA

Log on to ONEPeralta

Sign in

All ONEPeralta Users

1. Enter into your browser > one.peralta.edu
2. Enter > Peralta email **User ID** and **Password**
3. Click > **Sign In**

Note

Due to periodic system improvements and your evolving role within the system, the screenshots in this training may be different from what you will see when you log in to ONEPeralta.
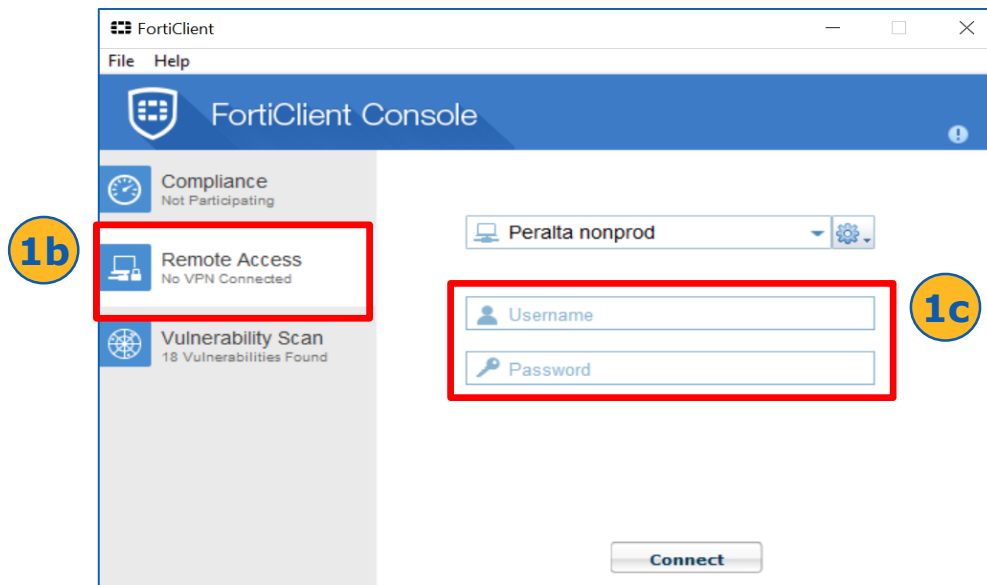
Log on to ONEPeralta (cont'd)

Turn on VPN

All ONEPeralta Users

If you are having trouble logging into to ONEPeralta, you may need to connect to Peralta's **Virtual Private Network** (VPN) before you are able to log in to ONEPeralta. Follow the steps below to connect to VPN, then try logging in again.

Turn on VPN using **one of two methods**:

1. Desktop (recommended method)
   a. Open > **FortiClient**
   b. Select > **Remote Access**
   c. Enter > Peralta email **Username** and **Password**
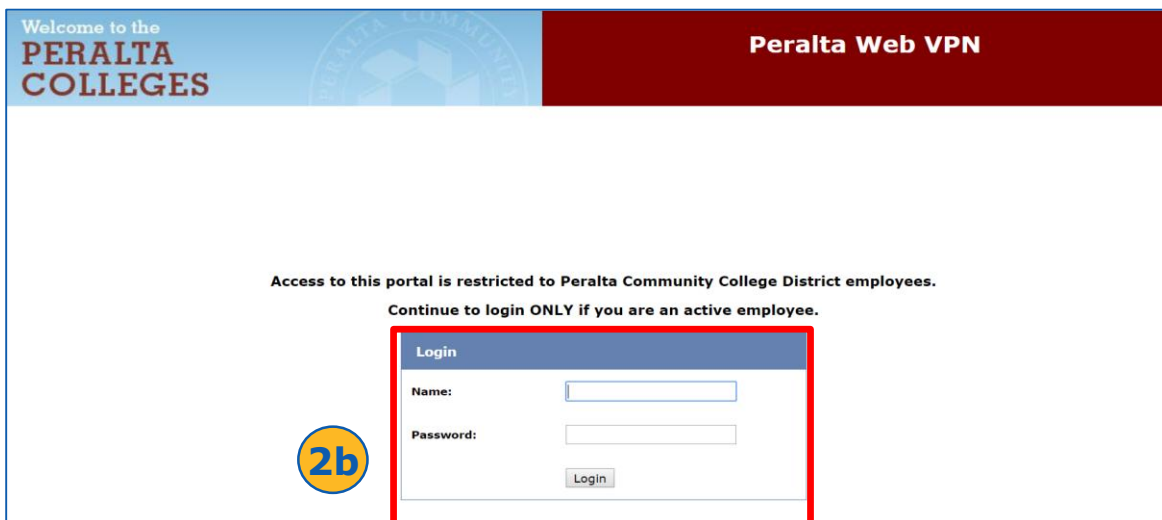
Log on to ONEPeralta (cont'd)

Turn on VPN

All ONEPeralta Users

2. Web / Browser
    a. Enter into your browser > https://access.peralta.edu/
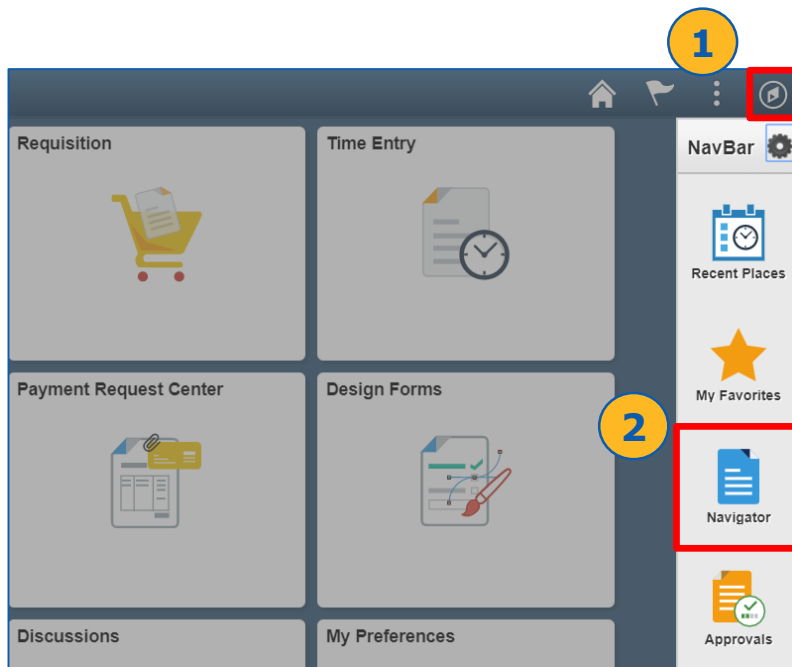   b. Enter > Peralta email **Username** and **Password**

Create a RTV Against a Receipt

In the upgraded ONEPeralta system, all returns of goods are completed online through the return-to-vendor (RTV) process, allowing for better tracking and accountability.
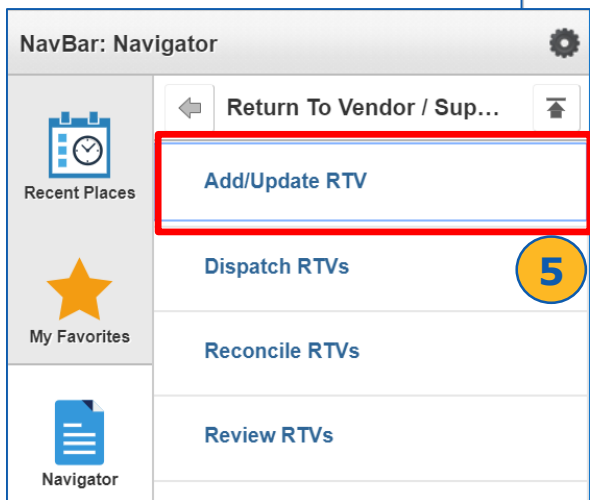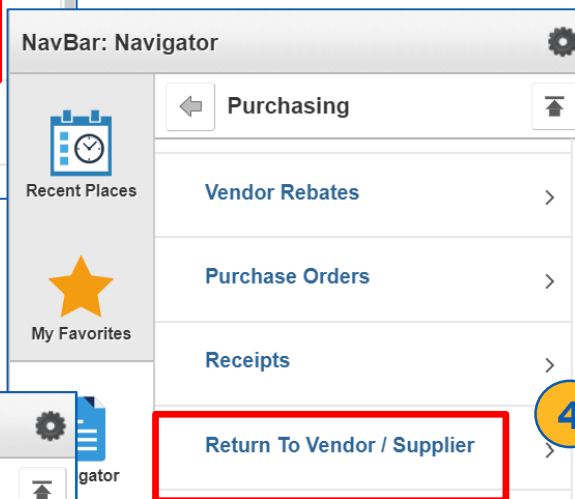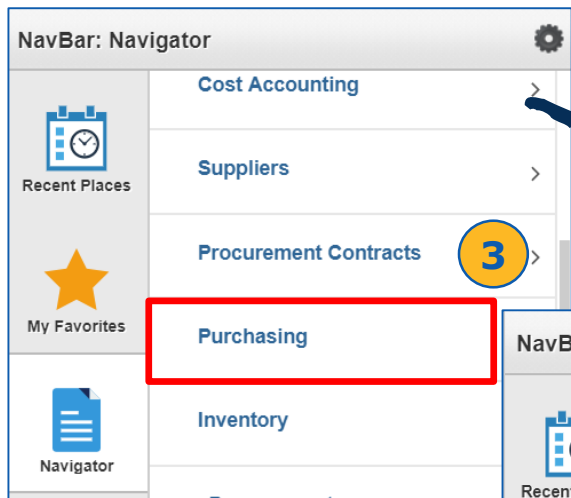
All Warehouse

1. Click > **NavBar** icon
2. Click > **Navigator**
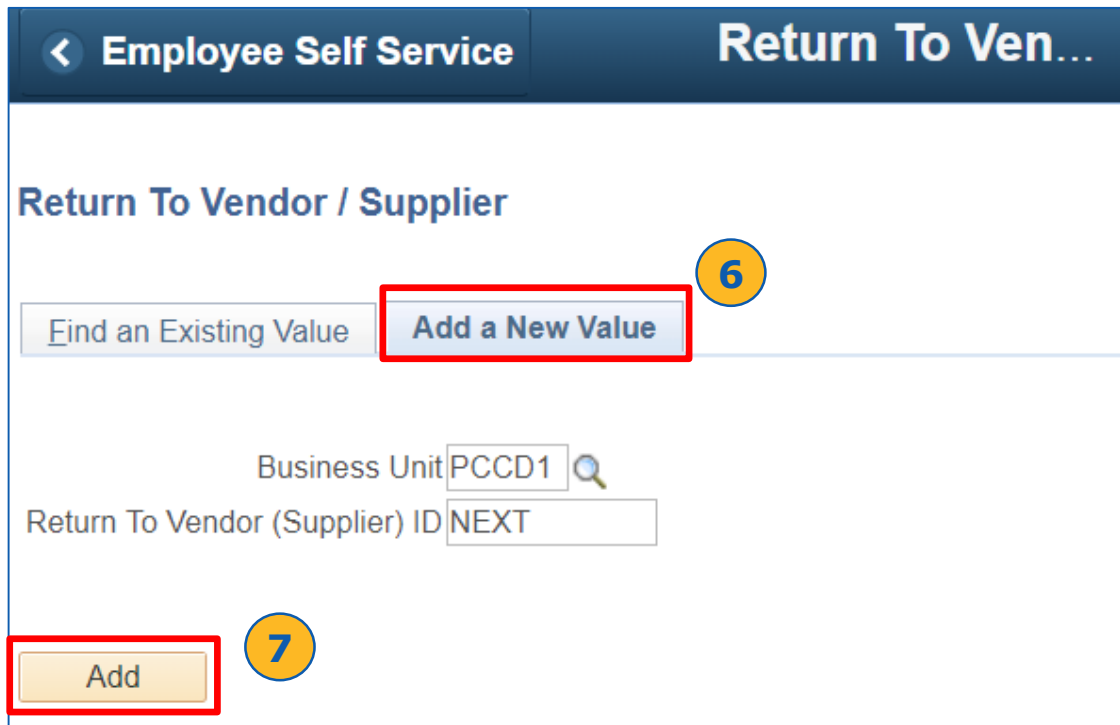
Create a RTV Against a Receipt (cont'd)

3. Click > **Purchasing**
4. Click > **Return to Vendor/Supplier**
5. Click > **Add/Update RTVs**

Create a RTV Against a Receipt (cont'd)

6. Click > **Add a New Value**
7. Click > **Add**

Note There is only one **Business Unit** at Peralta (PCCD1). The **RTV ID** will be assigned automatically by the system.

Create a RTV Against a Receipt (cont'd)

8. Complete > **Supplier** information
9. Click > **Header Details**
10. Complete applicable fields
11. Click **OK**

Create a RTV Against a Receipt (cont'd)

12. Click > **RTV Defaults**
13. Complete applicable fields
14. Click **OK**

Create a RTV Against a Receipt (cont'd)

15. Click > **Select Receipt**
16. Enter > Receipt details
17. Click > **Search**
18. Select > **Checkbox** next to correct Receipt
19. Click > **OK**

Create a RTV Against a Receipt (cont'd)

20. Click **RTV Lines** tab
21. Select > desired action from the **Action** dropdown menu
22. Complete > other fields in **RTV Lines** tab
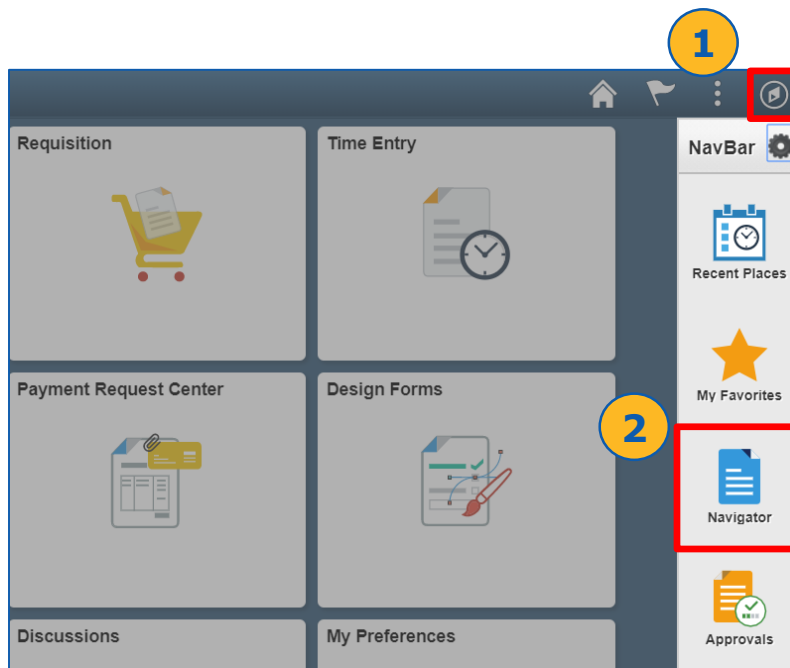23. Complete > **Optional Input**, **Return Amounts**, and **Source Information** tabs as necessary
24. Click > **Save**

Dispatch a RTV

Once you have created a RTV for goods that need to be returned, you will need to dispatch the RTV to the supplier to initiate the return of credit, or a replacement or exchange.
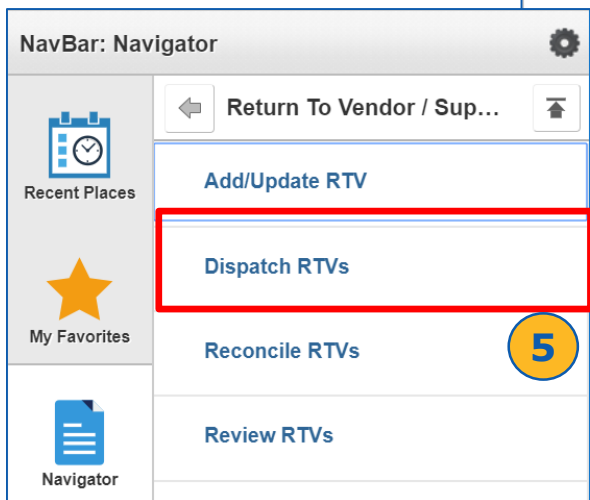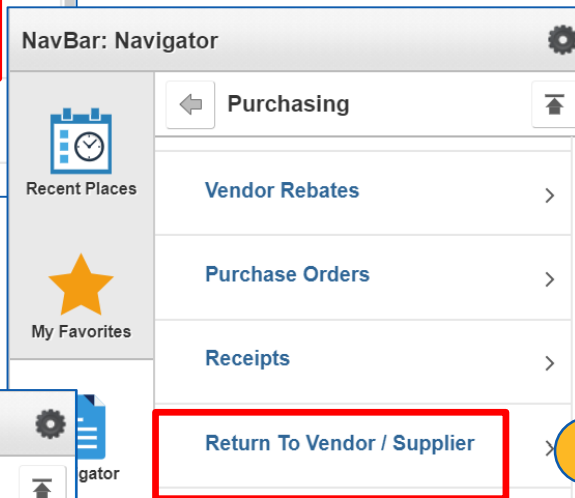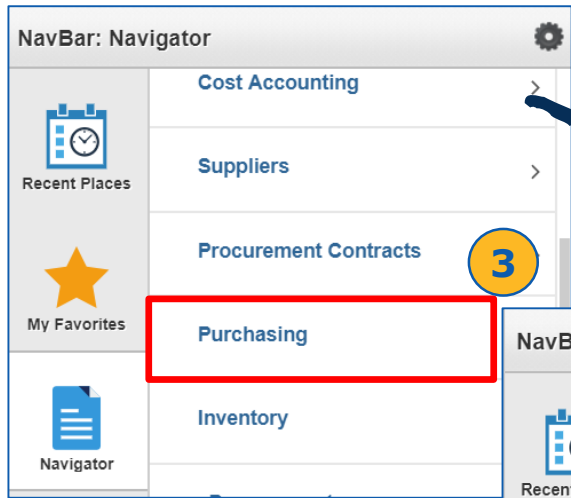
All Warehouse

1. Click > **NavBar** icon
2. Click > **Navigator**

Dispatch a RTV (cont'd)

3. Click > **Purchasing**
4. Click > **Return to Vendor/Supplier**
5. Click > **Dispatch RTVs**

Dispatch a RTV (cont'd)

6. Click > **Find an Existing Value** tab
7. Enter > **Run Control ID**
8. Click > **Search**

Note

Every user will create their own Run Control ID to help them identify specific processes. When creating it for the first time, you will need to go into the Add a New Value tab. After creating it, you will be able to search for it under the Find an Existing Value tab.

Dispatch a RTV (cont'd)

9. Complete > **Process Request Parameters** fields
10. Complete > **Statuses to Include** fields
11. Complete > **Dispatch Methods to Include** fields
12. Complete > **Miscellaneous Options** fields
13. Click > **Run**

Dispatch a RTV (cont'd)

14. Complete > fields in **Process Scheduler Request** window
15. Select > Dispatch method from **Process List**
16. Click > **OK**

Dispatch a RTV (cont'd)

17. Select > **Process Monitor**
18. View > **PORT001** process **Run Status**
19. If Run Status is not successful, click **Details** for more information

Dispatch a RTV (cont'd)

20. Click > **Message Log**
21. Click > **Explain**
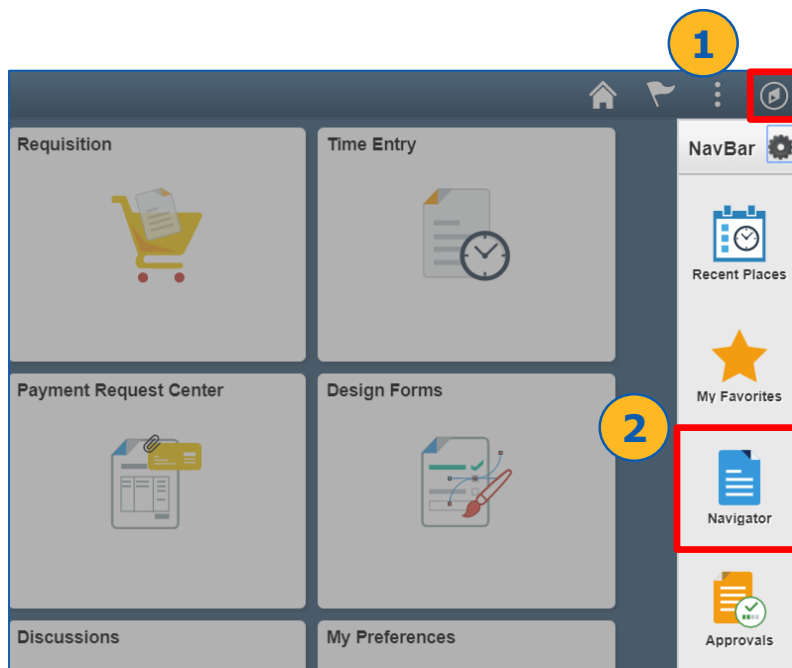22. Click > **Return,** and then troubleshoot the identified error

Override Supplier Address

There may be instances when a supplier's address for return shipments is different from its main address stored in ONEPeralta. If this is the case, you will need to override the supplier address for RTVs.
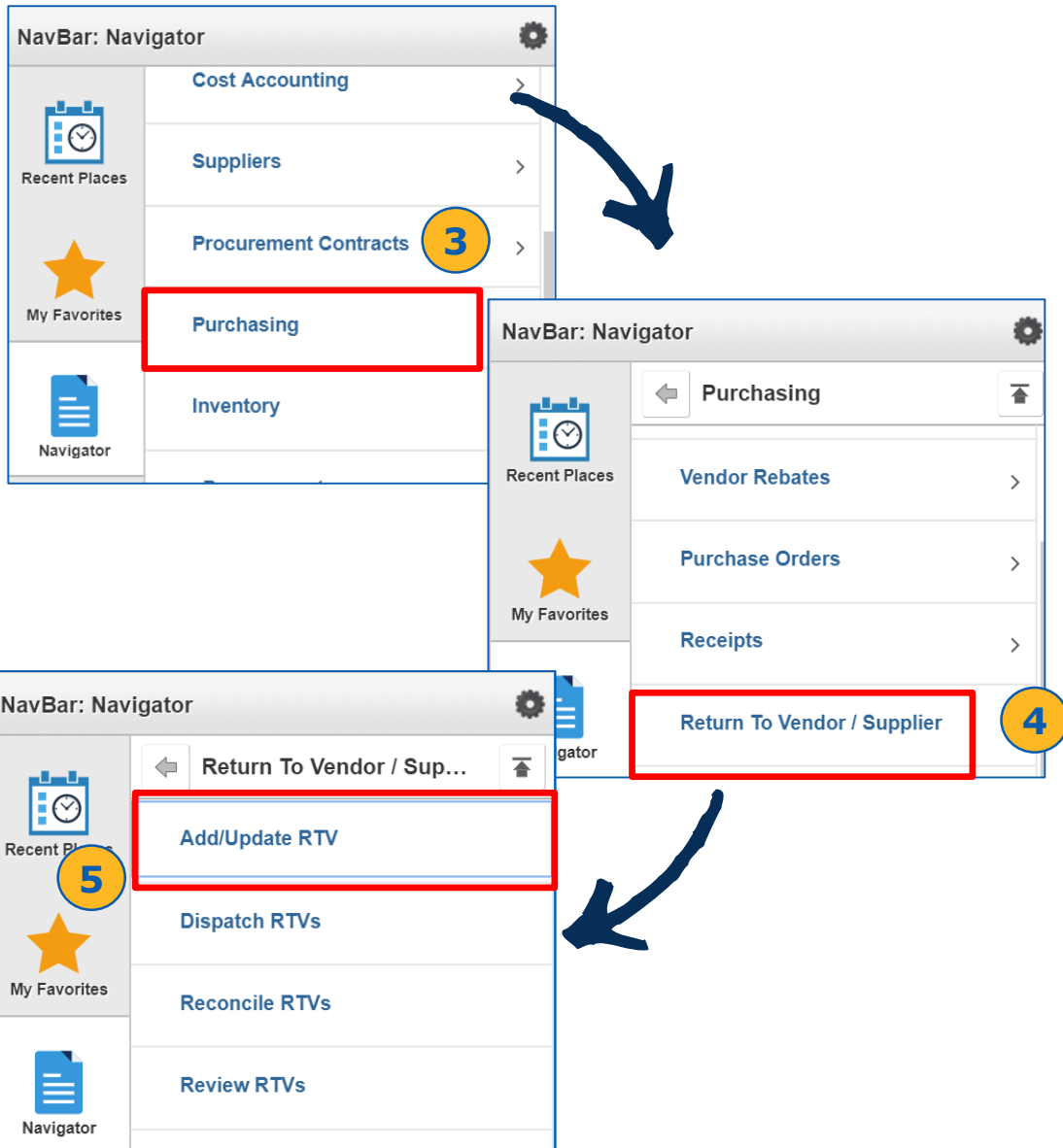
All Warehouse
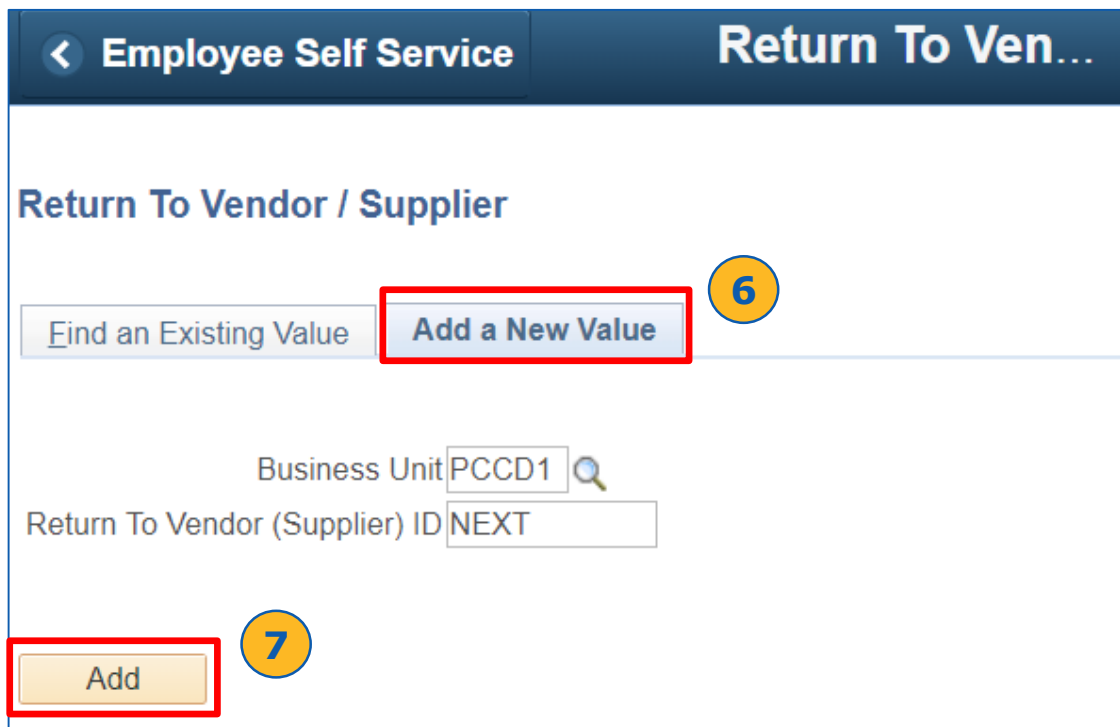
1. Click > **NavBar** icon
2. Click > **Navigator**

Override Supplier Address (cont'd)

3. Click > **Purchasing**
4. Click > **Return to Vendor/Supplier**
5. Click > **Add/Update RTVs**

Override Supplier Address (cont'd)

6. Click > **Add a New Value**. Do not edit the fields!
7. Click > **Add**

Note

There is only one **Business Unit** at Peralta (PCCD1). The **RTV ID** will be assigned automatically by the system.

Override Supplier Address (cont'd)

8. Complete > **Supplier** information
9. Click > **Header Details**
10. Complete applicable fields
11. Click **OK**

Override Supplier Address (cont'd)

12. Click > **RTV Defaults**
13. Complete applicable fields
14. Click **OK**

Override Supplier Address (cont'd)

15. Click > **Override Supplier Address**
16. Update > **Override Address** fields
17. Click > **OK**

Create a RTV Against a Receipt (cont'd)

18. Click > **Select Receipt**
19. Enter > Receipt details
20. Click > **Search**
21. Select > **Checkbox** next to correct Receipt
22. Click > **OK**

Create a RTV Against a Receipt (cont'd)

23. Click **RTV Lines** tab
24. Select > desired action from the **Action** dropdown menu
25. Complete > other fields in **RTV Lines** tab
26. Complete > **Optional Input**, **Return Amounts**, and **Source Information** tabs as necessary
27. Click > **Save**