# Direct Customer Return Portal

Self-Help & Learning

**Disclaimer**: Please note that there may be slight variations in the screenshots and images depicted in this manual compared to the actual portal interface

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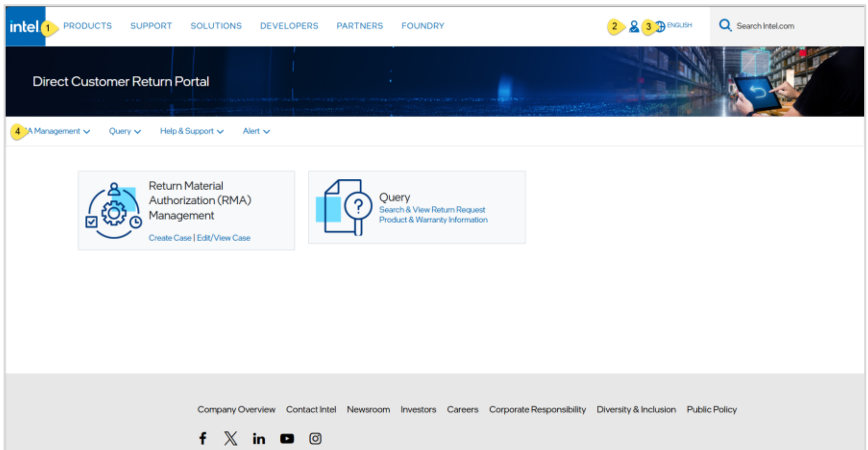
# Get Started

Dear valued customers, we aim to simplify the return process for you. Please refer to this manual for self-help articles to assist you in getting started, and feel free to contact us for any further inquiries.

## Get to know Direct Customer Return Portal

The new Direct Customer Return Portal is here and better than before. Following image is a snapshot of the Portal Homepage.




*Direct Customer Return Portal Homepage*

1. Main Intel Menu that you would use to navigate around Intel website.
2. User Profile and login.
3. Language selection.
4. Our Portal Menu that you will mainly use to navigate our portal.

## Sign in to the Direct Customer Return Portal via Desktop First Time

**Pre-requisite**: To login to our portal, you either need to be connected to Intel Network or your user contact must be created by our agents.

1. Access Intel's Portal (www.intel.com) or link to navigate directly to our Direct to Return Portal link.
2. To log in or register, please use your registered email and password, then click "Next." If you do not have an account, please contact us. Our support team will set up your account, and you will receive an email notification once it is ready.

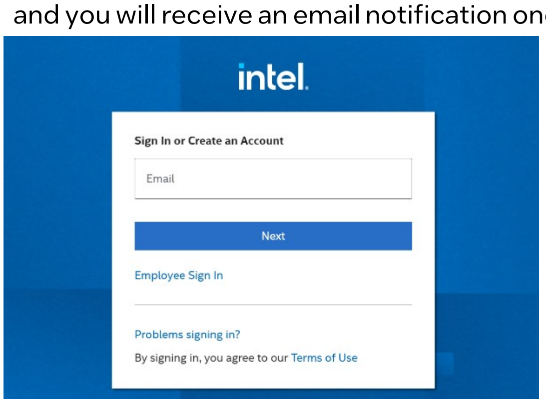



*Image 1: Sign In/Create Account*

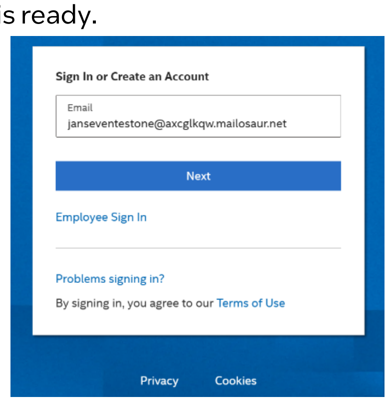



*Image 2: Email address entered*

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3. Use the provided details to log in, set up your profile, and complete verification. Once completed, you can use our portal.
4. Next, read the permission terms and click **Accept** button.

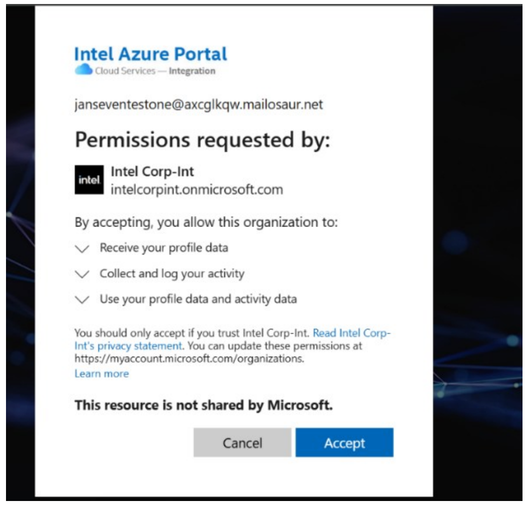


*Image 3: Azure permission terms*

5. User Authentication Process – The following prompt may appear to authenticate your identity, requiring the use of your mobile device. If the Microsoft Authenticator is not installed on your phone, you may either install it or select an alternative method as indicated in Image 4 below.

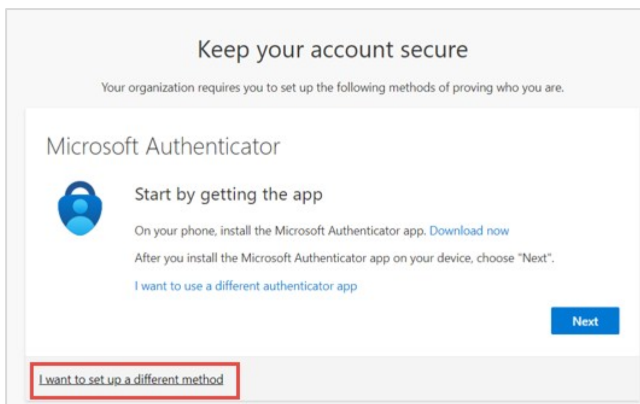


*Image 4: Authentication method*

6. As part of the authentication process, you may choose from the following methods:
   a. [Ms Authenticator]
   b. [Phone]

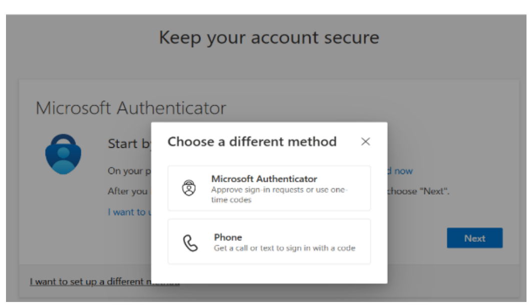


*Image 5: Select authentication methods*

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7. Once logged in, you now, select the Direct Customer Return Portal if you are logging in from our primary Intel portal or you may see the Homepage for Direct to Return Portal.

## Microsoft Authenticator (mobile)

a. Select Microsoft Authenticator option. Click **Next** button.

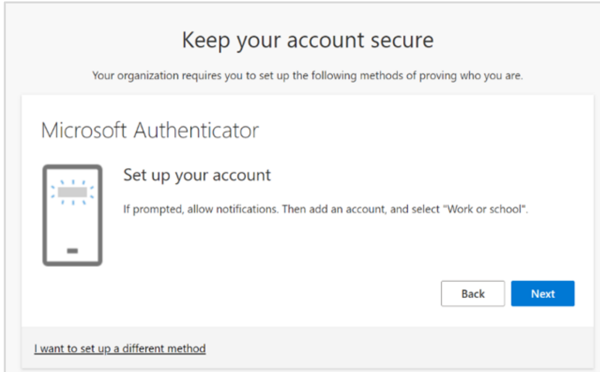


*Image 9: Microsoft Authenticator Option*

b. You will now see '**Scan the QR code'** option.

> **Note**: For the subsequent steps, you will need to use your mobile device.

c. Open Microsoft Authenticator App on your mobile device.
d. Click on **Add work or school account** option and then select **Scan a QR code**.
e. Click on Scan QR Code and scan the QR Code as shown on your screen from your mobile device.
f. You will see a message **Account got successfully got added** to your mobile device. Click Next button.
g. Then, you will need to Approve or Reject notification on mobile by entering a code number displayed on your laptop into your mobile device. Upon Approval, you will see that the notification is approved in your desktop. Click **Next** button.

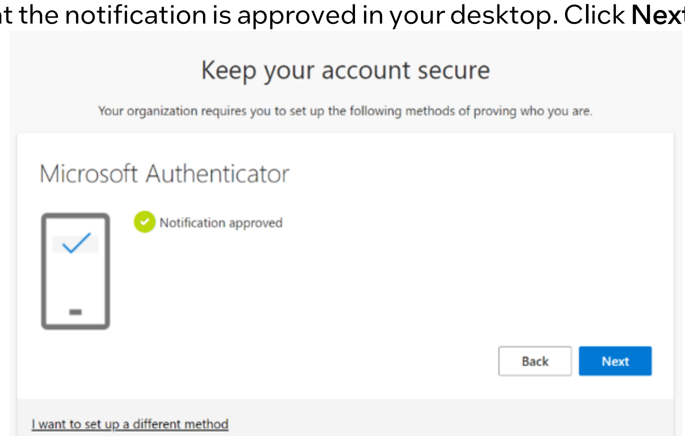


*Image 10: Notification approval*

h. Once, the authentication is successful, you will see Success screen with notification. You can now click **Done** button as your account is now successfully setup.

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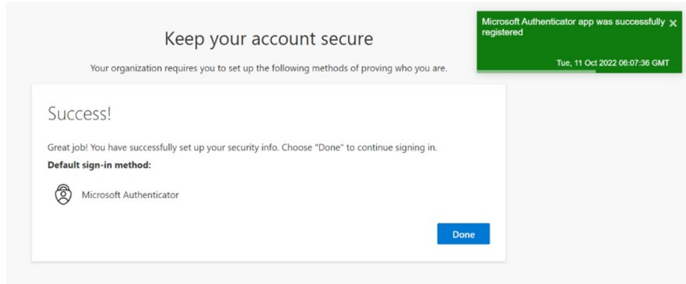


*Image 11: Sign-in setup successful*

i. To access the application, you would need to accept the terms and conditions by clicking on the Accept button.

## Phone

a. Select the Phone option.
b. You need to enter your country code and the contact number to authenticate your identity. Click **Next** once you've selected the code or call option.

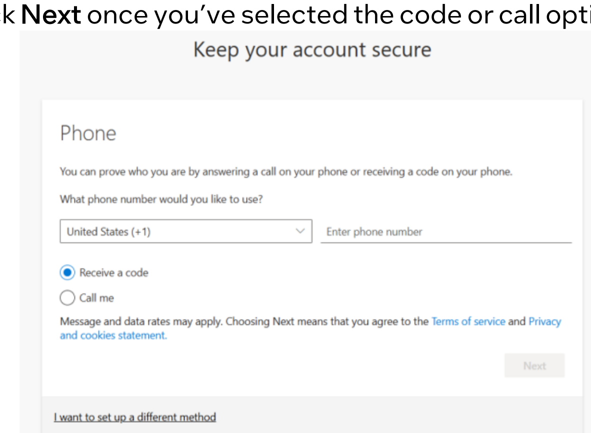


*Image 12: Receive code option via phone*

c. If you have selected the code option, you may receive a six-digit code to your mobile device in which you have associated the phone number earlier. Enter the number and click **Next** button.

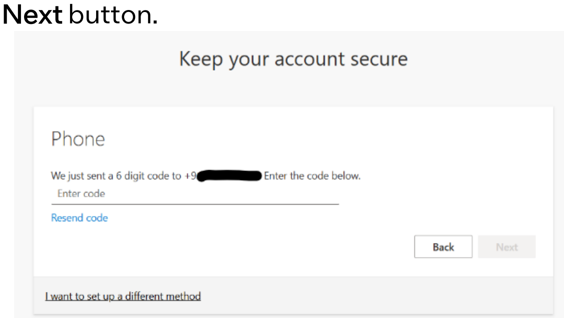


*Image 13: 6-digit code*

d. You will see the Phone number registration success notification. Click **Next** button.

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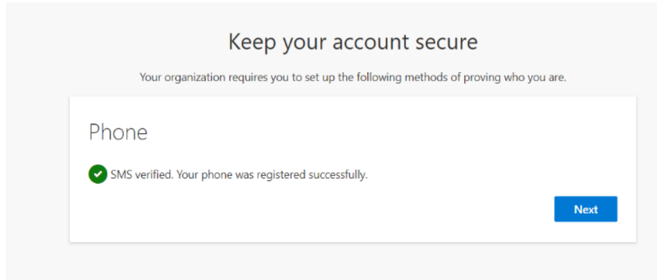



*Image 14: SMS Verification Success*

e. Now you will see the success note that you phone number is authenticated successfully. Click **Done**.

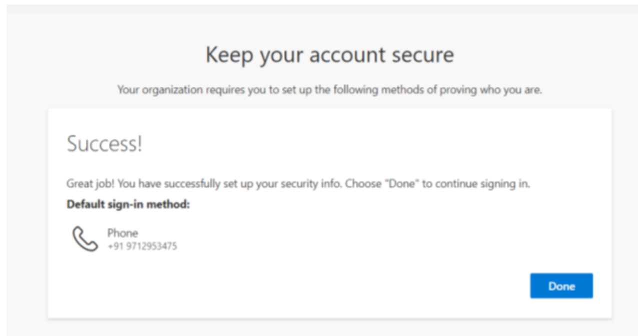



*Image 15: Setup successful*

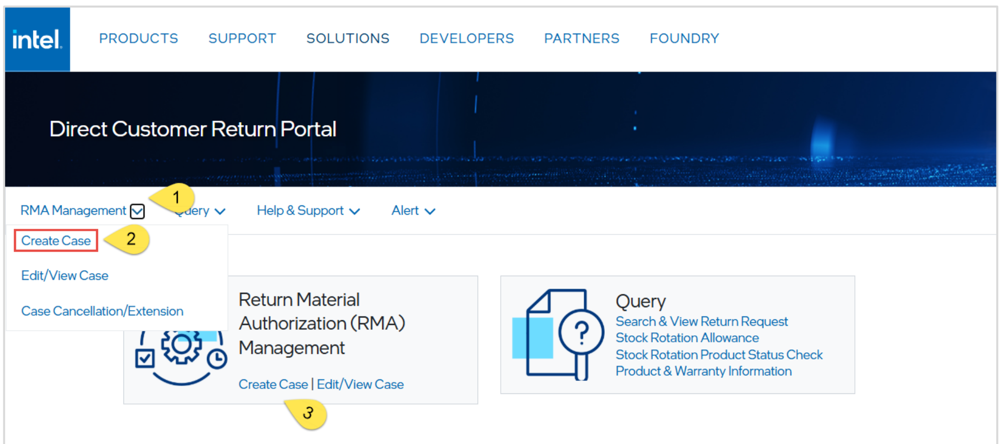
# Return Material Authorization (RMA) Management

Return Material Authorization (RMA) Management is a process for us to help you handle the return of products from you, our customer. It involves authorizing, tracking, and processing returns to ensure efficient handling and resolution.

In this RMA Management section, you will learn to create a new case, edit or view a case or do a case cancellation or extension in our portal.

The subsequent procedures pertain specifically to the **Technical** Service Type. However, the steps equally applicable to the Quality and Stock Rotation (only for distributors) Service Types.

1. From Homepage, you can click on Create Case or at the Main menu, you can click on RMA Management and select Create Case.




*Case Creation: Navigation Options*

2. In the New R4C Case pop modal window, choose the Service Type based on your return case. By default, Technical is selected.
3. There are three Service Types that you can select. Following is the definition to help you select the right service type. You can also mouse over the icon to view the similar cue.
    a. **Technical**: Units failed at end customer/Failed at customer factor site (not a quality return).
    b. **Stock Rotation**: Quarterly stock rotation program. ***Note****: This option is only visible for Distributors.*
    c. **Quality**: Units identified as part of a known quality return program (MRB/QAN)
4. Next, click on **Create** button.

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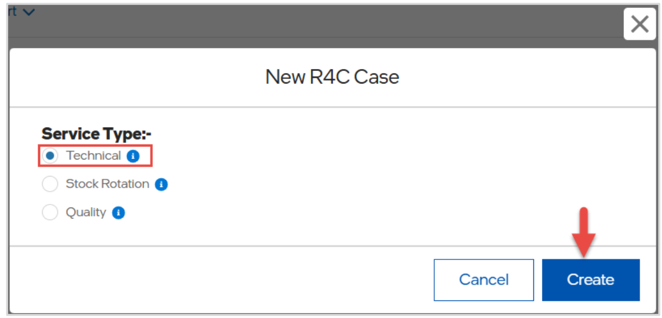
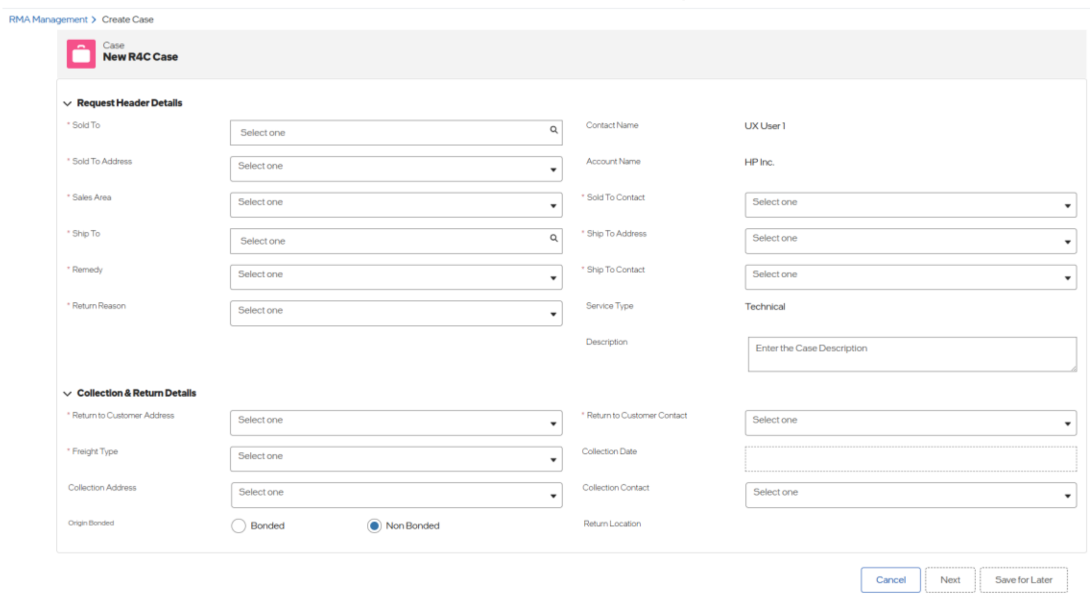



*Create New Case*

5. You now will see the New R4C Case Creation form that you need to fill in.




*New R4C Case Creation*

6. Fill in the [Request Header Detail Section](#) and [Collection Details](#) in the form.
7. Ensure all fields marked with a red asterisk (*) are filled out before proceeding as those are required fields. The next button will remain disabled until all mandatory fields are completed.
8. Contact Name & Account Name will be auto populated as hyperlinks. The selected Service Type is shown as a text field.

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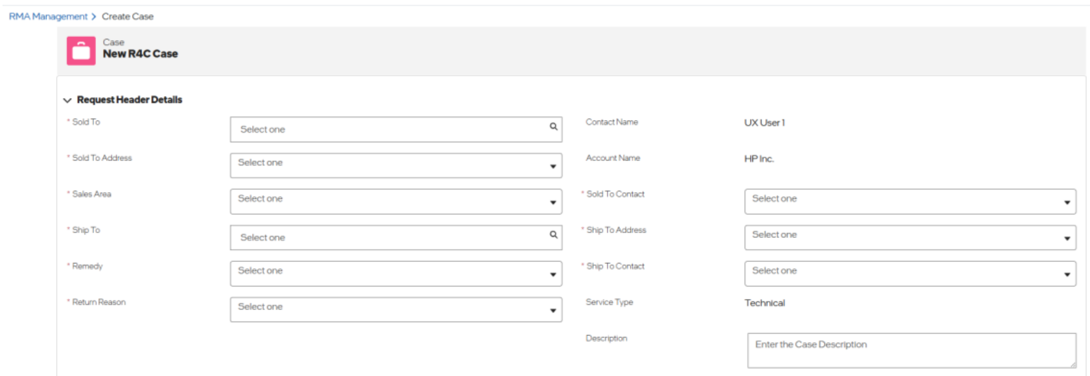
## Detailed Steps to fill in the Request Header Details Section

The example in the images may depicts a Service Type. However, similar step applies to all Service Types.

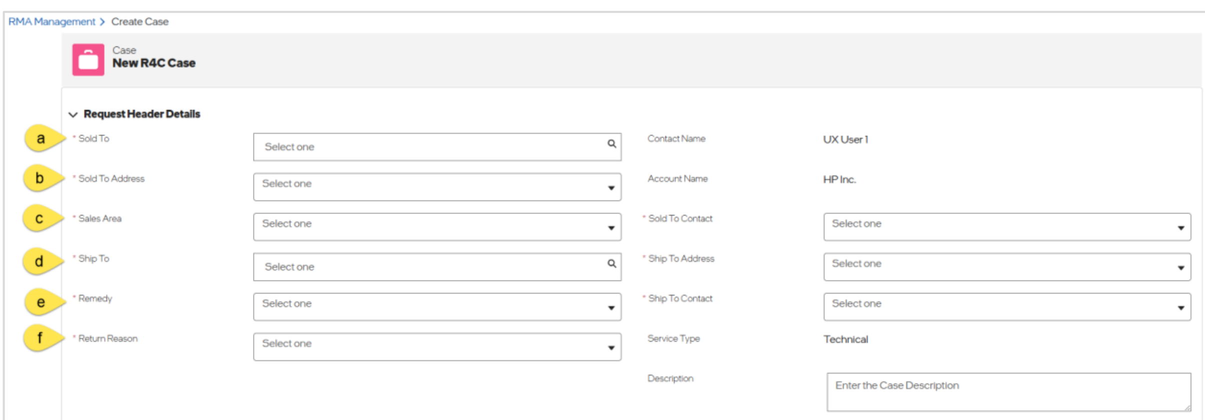



*Request Header Details*

i. **Mandatory Field Completion:** Ensure all fields marked with a red asterisk (*) are filled out before proceeding. The next button should remain disabled until all mandatory fields are completed.

ii. **Auto-populated Fields:** Contact Name, Account Name and Service Type will be auto-populated.

iii. **Fields within Request Header Details**




*Fields within request header details*

a. **Sold To:**

- All records related to your account with a corresponding 'Customer Account' record will be available and select the most appropriate value.
- Upon selection, other data fields will be auto populated based on the most recent case created using the selected 'Sold To', if applicable.

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**Note: Payer**
Based on the selected Sold To and Sales area, the Payer record will be shown. If no record is found or if there are blocks, you will be prompted with an error message. Then, you need you contact our agent to resolve this.

b. **Ship To:** All 'Customer CMF' records related to the account with a corresponding 'Customer Account record can be selected.
   - Values are dependent on the selected Sold To & Sales Area, refreshing/resetting when Sold To/Sales Area is changed.

**Note: Wild Card Search for Ship To**
Similar to the 'Sold To' selection, a wildcard search functionality is available for the 'Ship To' field.

Tips: **Sales areas** is Sales Org Code - Sales Org Name / Distributional Code - Distribution Channel Name; EU02-U.K./02-Industrial Disti.

c. **Remedy:**
   - For Service type "**Stock Rotation**", the remedy is "Credit," auto populated in the dropdown.
   - For Service type "**Technical**", the remedy options will be Credit, NPR Credit and Exchange.
   - For Service type "**Quality**", the remedy options will be Credit and NPR Credit.

**Reference: Remedy Selections Options**

| Remedy Selection | Field(s) Display Collection & Return Detail |
|---|---|
| Credit: | QAN/MRB/PRT. FAC option not displayed. FAC cases handled through CQNR. |
| NPR-Credit: | Collection Details section will not appear. |
| Exchange: | Add only Collection Address in the Collection & Return Details section. |

d. **Return Reason:**
   - Values are based on the service type and Remedy values.
   - Options are dependent on the Sold To & Sales area combination, with certain allowances influencing availability.
   - When Sold To/Sales area is changed, the Return reason should be reset.

**Note: Populating return reason options in UI**
For Stock Rotation, the options are also dependent on
1. The selected Sold To & Sales area combination.
2. The amount in allowance records should be greater than zero.
3. The Start Date should be less than or equal to current date and End date should be greater than or equal to current date.

**Optional: Add/Edit/Delete Existing Contact:**
- Add new 'Sold To Contact' or 'Ship To Contact' contacts and edit or delete existing contacts.
- Select 'Add, Edit, and Delete Contact' from either dropdown.
- When creating a new contact record, First Name, Email, and Phone Number are mandatory fields.

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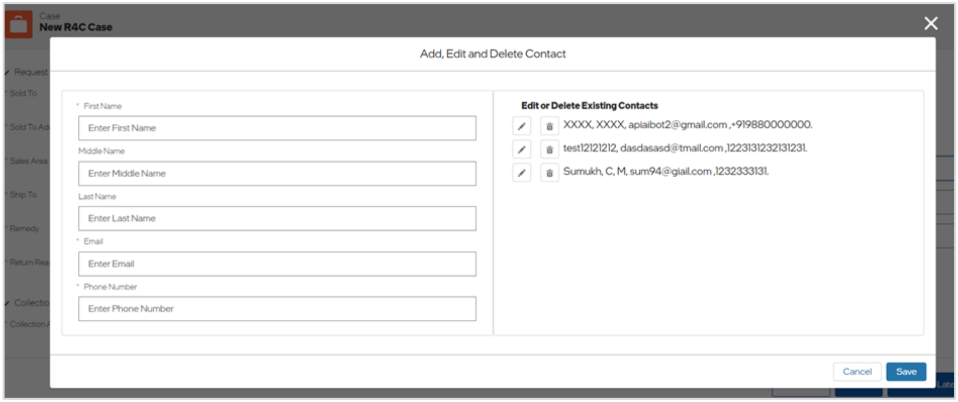


*Add, Edit and Delete Contact*

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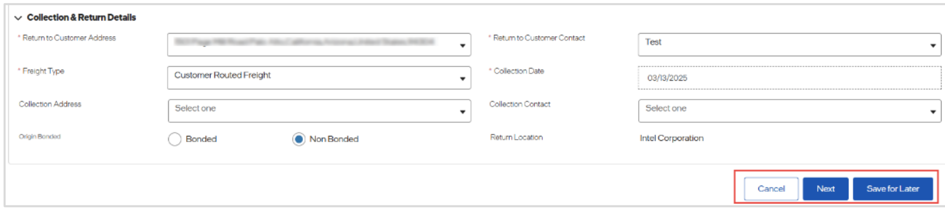
## Detailed Steps to fill in the Collection Details

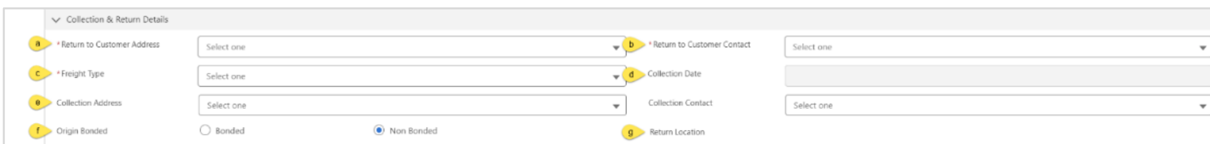
> The example in the images may depicts a Service Type. However, similar step applies to all Service Types.




*Collection & Return Details*

1. **Mandatory Field Restrictions:** The 'Collection Details' section will be disabled until all required fields in the 'Request Header Details' section are filled.

2. **Fields to be Completed:**




*Fields within Collection Details*

a. **Return to Customer Address Selection:**
   i. Options are determined and populated from the Physical Address records related to the selected Sold To CMF with the address type 'Return To Customer'.

b. **Return to Customer Contact Selection:**
   i. Contacts are fetched based on the selected 'Return to Customer Address'.

c. **Freight Type:**
   i. After selecting 'Return to Customer Address', Freight Type values are determined and populated from the 'Sales Freight Determination Matrix'.
   ii. Freight Type values are filtered based on various criteria including Remedy, Service Type, Return Reason, Geography, and RTC Address Country fields in the matrix.
   iii. If no record is found, further exclusion is performed until a match is found or a hard stop occurs.
   iv. For IMF (Intel Managed Freight) Freight Type:
      a) If you select the freight type as IMF (Intel Managed Freight), or if IMF is auto populated (in case of only one freight type value), you will get an OPT OUT prompt (only if the selected Sales Area 'Geo' value is ASMO, APAC, IJKK, or APJ).
      b) If you click 'OK', the freight type will be changed to CRF or if you click 'Cancel', the freight type will be selected as IMF.
      c) Collection Details fields become mandatory for IMF.

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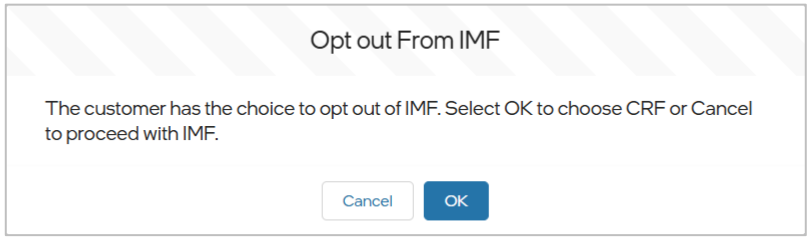


*Option to opt out from IMF*

> **Note:** For IMF, the **collection date** will be reset if the case is edited, and the collection date is not equal to the current date.

v. For CRF (Customer Routed Freight) Freight Type:
   1. For freight type CRF (Customer Routed Freight), the collection date, Return to Customer address & Return to customer contact fields are mandatory to proceed further.
   2. Collection date will auto-populate to the current day/case creation day as soon as you select freight type as "CRF" and all the succeeding days would be enabled for you to choose from including holidays and weekends.

> **Additional Insights: Incoterm Determination Matrix**
> The Incoterm value is fetched from the matrix based on the following parameters. The record with the lowest priority number that matches the criteria is selected:
>
> - Service Type
> - Remedy Type
> - Country
> - Return Reason
> - Geography
>
> If no record is found, the value will be empty.

d. **Collection Date:**

- Collection Date is auto populated based on the Geo Lead Time Matrix for IMF.
- After selecting the Collection Address, the collection date field is enabled, and date is auto populated.
- For APAC / APJ - 5 days are considered as 'Lead Time'. Here the 5th day from current day/ case creation day will be auto populated in the collection date.
- Apart from that the 4th day would be enabled to choose from and the next 8 days would also be enabled for a total of 10 enabled days. These dates are all excluding holidays and weekends.
- For all other regions – 'Lead Time' is 3 days. Therefore, 3rd day from current day would be auto populated, 2nd day would be enabled along with the next 8 days succeeding 'Lead Time' excluding holidays & weekends.
- **Example:** Let Case creation date is 14th Mar 2023, the date auto populated for Geo APAC would be 22nd Mar 2023 if there is no holiday for the selected collection Address. If there is holiday for that country on 22nd Mar 2023, then it would be auto populated as 23rd Mar 2023.

> **Note:** 'Collection date' would be reset if the case is edited and the collection date is not equal to current date.

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e. **Collection Address and Collection Contact:**

   i. Collection Address options are determined and populated from Physical Address records related to the selected Sold To CMF with an address type of 'Collection'.

   ii. Addresses are filtered based on the Geo value of the selected Return to Customer address.

   iii. Collection Contact options are fetched based on the selected Collection Address.

f. **Origin Bond:** By default, the Origin Bond value is selected as 'Non-Bonded'. You can select 'Bonded' if required.

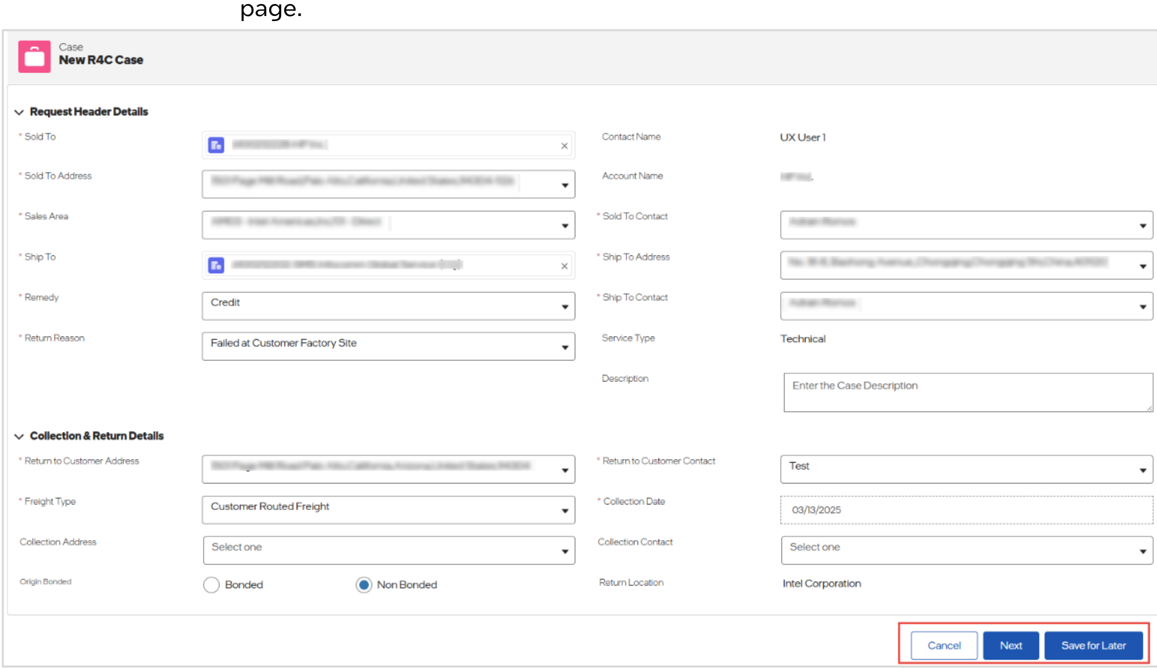
g. **Return Location:**

   i. Return Location value is determined from the 'Sales Return Location Matrix' based on selected criteria including Remedy, Service Type, Sold To CMF, Bonded Zone Indicator, and Country.

   ii. If no match is found with the specified criteria, Sold To CMF is excluded, and Return Location value is fetched again. If still no record is found, a hard stop occurs, and you will be notified.

> **Note: Tzone validation**
> When you create a new address or edits an existing address and saves it, the address is first validated using T-zone (Transportation zone) API.
> If the address is not valid, then you are not allowed to proceed further.
> Please provide a valid address for it to be saved.

   iii. After selecting all mandatory fields 'Next' button will be enabled. By clicking on the 'Next' button user will be able to proceed further. If "Cancel" is clicked, the case creation process will be stopped, and the page will be navigated to the contact page.




*New R4C Case screen*

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## Search/Upload Line Item

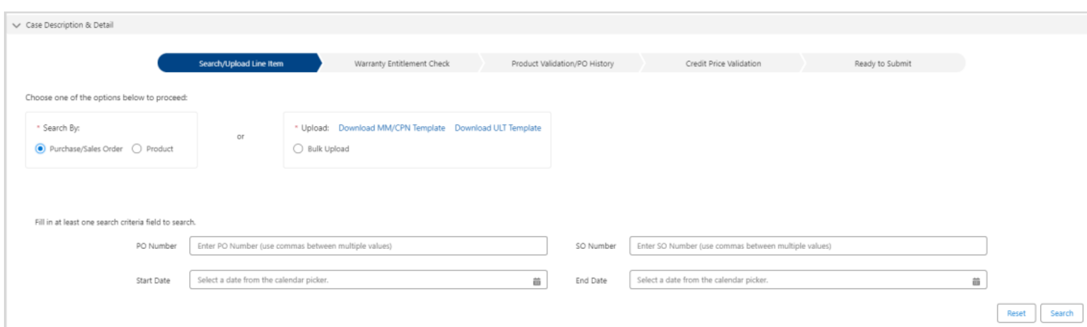
> The example in the images may depicts a Service Type. However, similar step applies to all Service Types.

1. After clicking the "**Next**" button, user will be directed to the 'Search/Upload Line Item' section located under the "Case Description and Detail" section. This section provides two options: 'Search By' and 'Upload Line Item'.

> **Reference: Expand/Collapse Sections:**
> Request Header Details, Collection Details, and Case Description & Detail sections can be expanded or collapsed by clicking on the '>' and 'V' arrows beside the section names, respectively.

2. The "Search By" option is further divided into two sub-options:
    a. Purchase/Sales Order Search
        i. PO Number (Purchase Order Number)
        ii. SO Number (Sales Order Number)
    b. Product Search
        i. MM (Material Master Identification)
        ii. OPN (Order Part Number)
        iii. CPN (Customer Part Number)
3. You can also alternatively use the upload feature to do Bulk Upload by Downloading the Template(csv) provided to your local machine and reupload the filled one.

## Purchase/Sales Order Search




*Search Line items by using PO Numbers or SO Numbers*

1. Search for line items using single or multiple comma separated (;) 'PO Numbers' or 'SO Numbers' along with the optional Start Date and End Date parameters.
2. If the Start Date or End Date parameters are not specified, the default date range will be set from 12 months prior to the current date up to the current date, based on the 'Sales Order Create Date'.
3. Enter the PO or SO number(s) and click on the "Search" button to obtain line items'.
4. If no response is obtained, it is a hard stop, and a notification will appear 'Records not found/Please check your PO number which you entered'.

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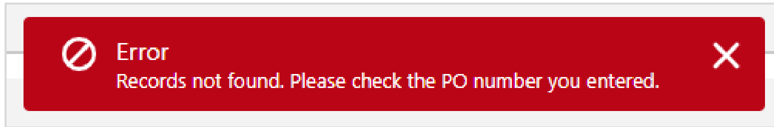
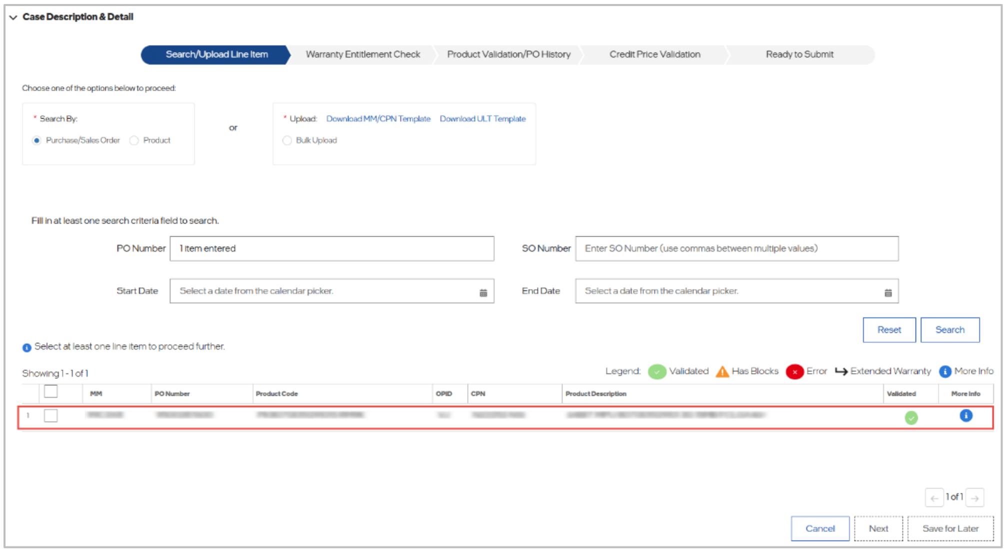



*Example of hard stop message*

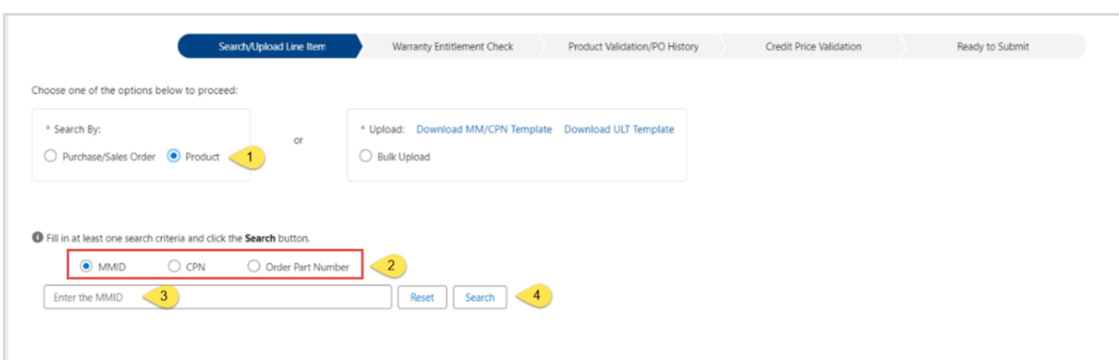
5. The line-item data appears below. It is validated using Item Type 'FERT' or 'KITS'. If Item type of line items is not 'FERT' or 'KITS', those line items are disabled.




*Example of line item(s)*

6. Select the line items from valid line-item data, at which point '**Next**' and '**Save for Later**' buttons would be enabled. Proceed to next step '**Warranty Entitlement Check**' for Technical or Quality Service Type. Otherwise, for Stock Rotation Service Type, you will be taken directly to '**Product Validation**'.
7. To reset the line-item data click on the "Reset" button.

## Product Search




*Steps to perform Product Search*

1. For Search by Product, you can select MM, CPN, and Order Part Number.
2. Enter the data and click on '**Search**' button to get the line items.

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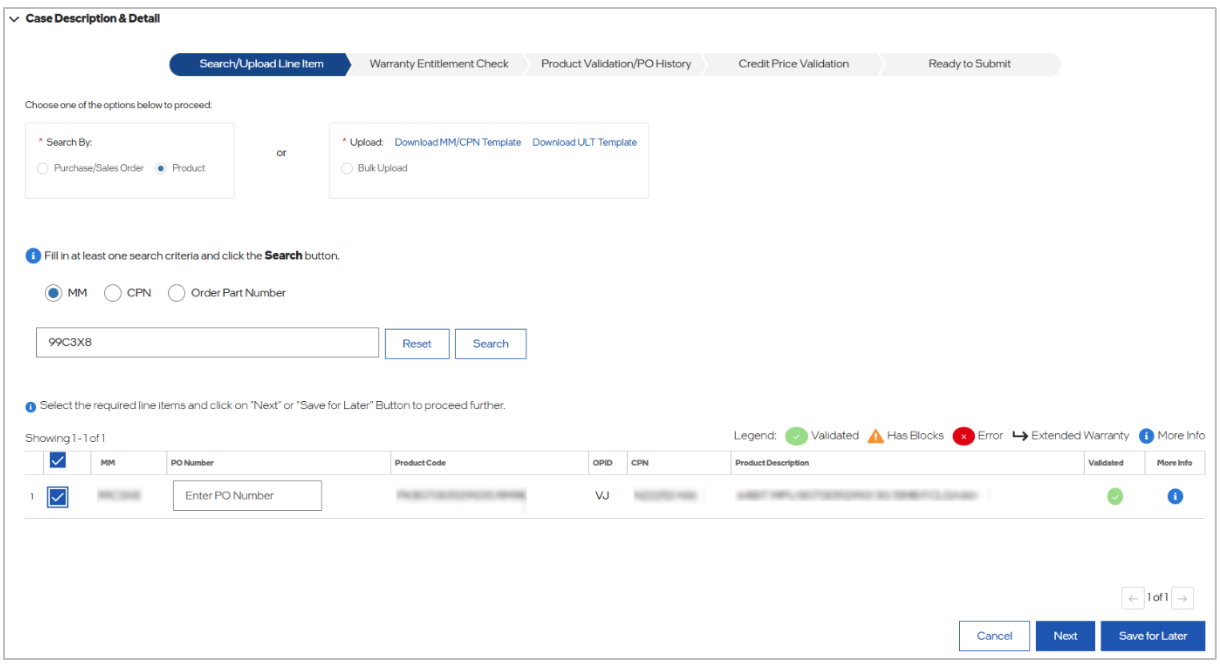
3. If you search by MM or OPN, the data entered validated with our database.

> **Note: Multiple CPN Scenario:**
> A single MM may have multiple CPN numbers. In this case, a pop-up window will appear showing the MM and its corresponding CPNs. Choose any CPN from the drop-down menu and submit. The selected CPNs will then be filled in and used for the respective line items.

4. When searching using CPN, all the valid MMs obtained are validated in the database to gather product details. The line-item data received is further validated based on the Item Type, which must be either 'FERT' or 'KITS'. If the Item Type of a line item is not 'FERT' or 'KITS', those line items are disabled.
5. After validation, the valid line items are displayed in a table format along with related product information obtained from the database.
6. Line items that fail validation are displayed in a disabled state, and a validation error is indicated by an 'i' icon in the validation column.
7. If all entered data fails validation, it is a hard stop, and an error toast message will appear to notify the error.




*Product Search by filling in MM*

8. You can manually enter PO numbers for each valid line item into the input box.
9. After entering PO numbers, select the required line items. Then, click on the **'Next'** button for further steps. Alternatively, you can choose to save the case for later by clicking on the **'Save for Later'** option.

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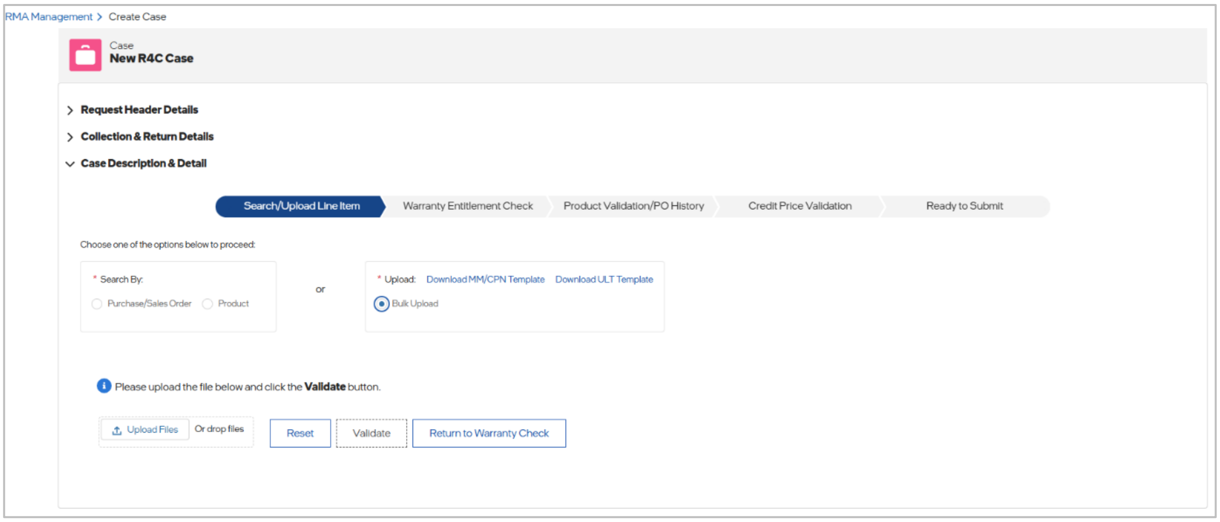
## Search/Upload Line-Item Bulk Upload

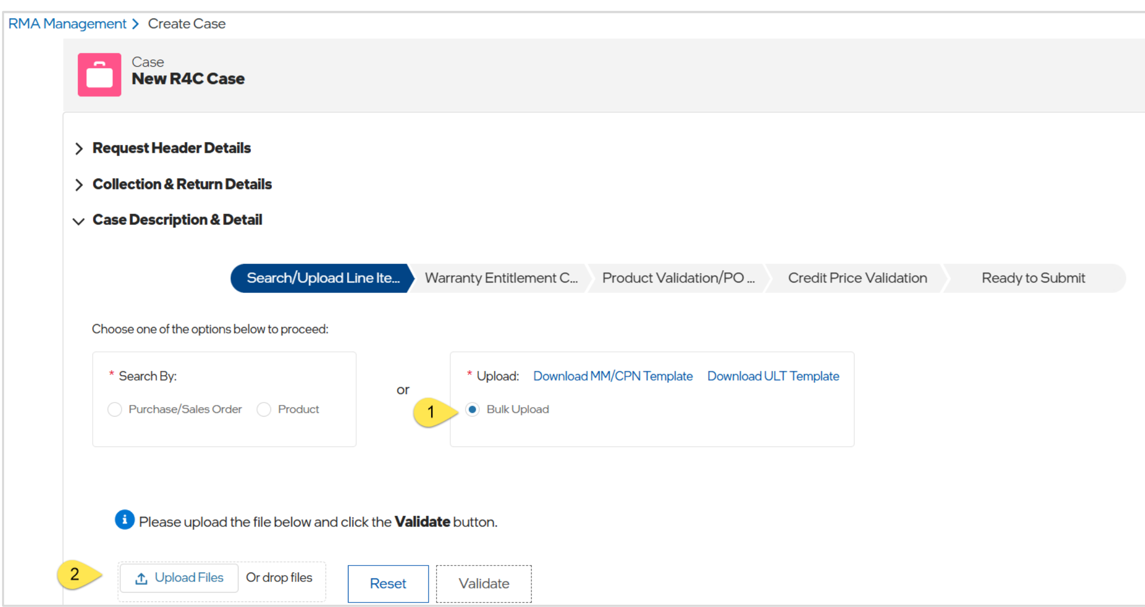



*Bulk Upload selection*

1. Instead of Search, you can do Bulk Upload by Downloading the two template(csv) 1) Download MM/CPN Template; 2) Download ULY Template provided to your local machine and reupload the filled one.

> **Note:**
> **Remedy as Credit:** Customer can upload only MM/CPN/OPN template.
> **Remedy as NPR- Credit :** Customer can upload either MM/CPN/OPN or ULT templates.

2. Ensure to fill in the necessary line-item data in the CSV template.
3. To upload the file, click on the '**Upload File**' button and select the file from their device, or they can simply drag and drop the CSV file into the designated 'drop files' area.




*Steps to upload file*

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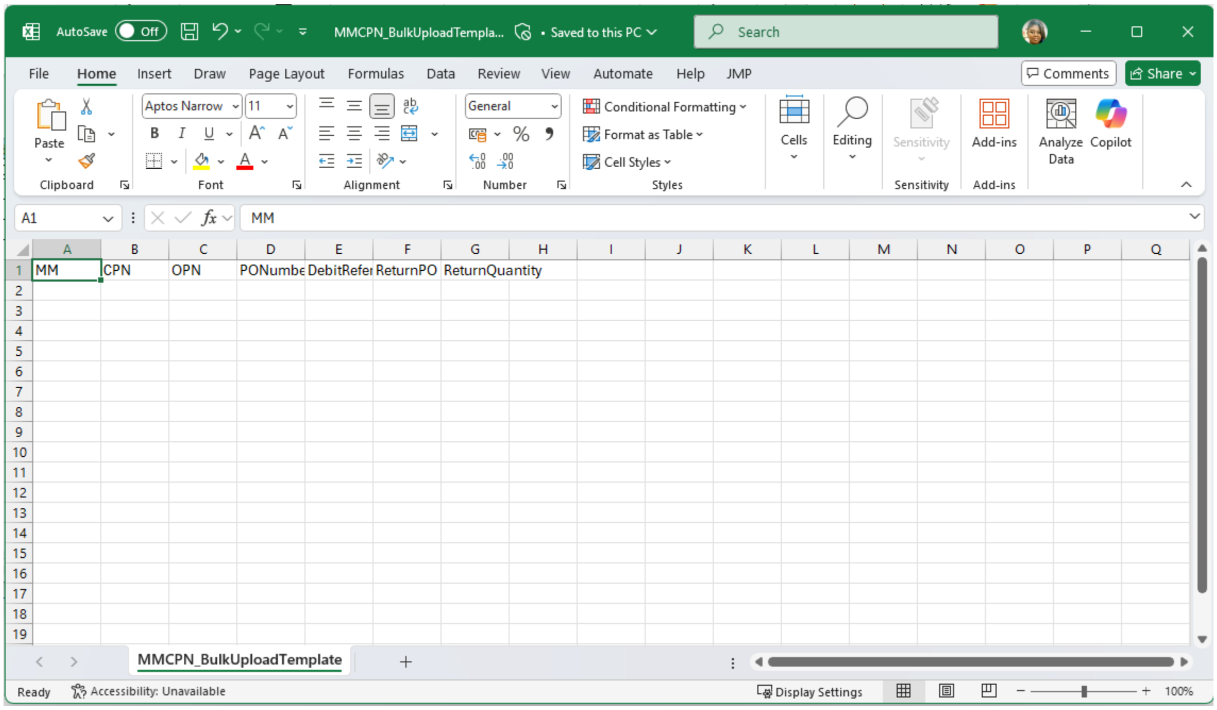
## How to Use Upload Template?




*Template sample*

1. For each line-item entry, either MM number, CPN number, or OPN must be provided along with the quantity.
2. All other fields are optional, and any data entered will be mapped to the respective line-item columns in subsequent stages.
3. To specify 'Return Package Conditions', the acceptable values are "Outer Box Opened - Product Unsealed" and "Box closed - Factory sealed". Any other values entered would be invalid and it will be set as default condition by selecting "Box closed - Factory sealed".
4. Upload the CSV file, then click on the **'Validate'** button for the line-item data to be processed and validated.

**Reference: Template Upload Validation Scenarios**

| Scenario | Outcome |
|---|---|
| Empty file or file format other than '.csv' | Error toast message |
| File missing any required field for any line item | Error toast message, Error Description Screen displayed below upload UI, option to download 'Bulk_Upload_Results.csv' with error messages |

:

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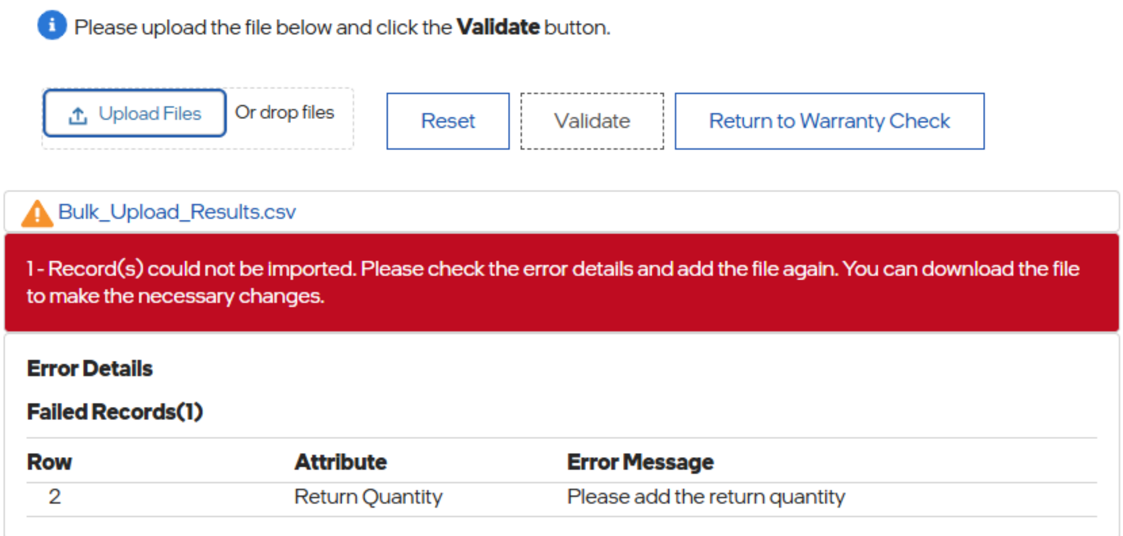
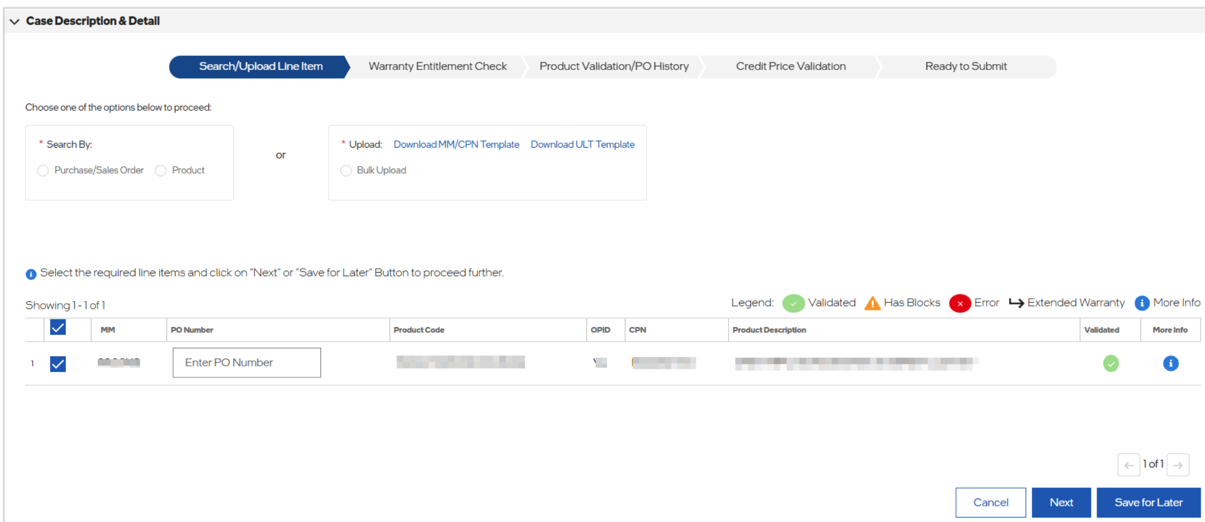



*Example of error message during upload*




*Data display upon Validation*

5. Manually enter PO numbers for each valid line item into the designated input box. These manually entered PO numbers will be validated. Progress is halted until PO validation is complete. If any data fails validation, a hard stop occurs, and you will receive an error toast message. You can reset any entered data by simply clicking on the "Reset" button.
6. Select the line item that is required and click on '**Next**' button.
7. Next, click on '**Warranty Entitlement Check**' button to validate the warranty details.

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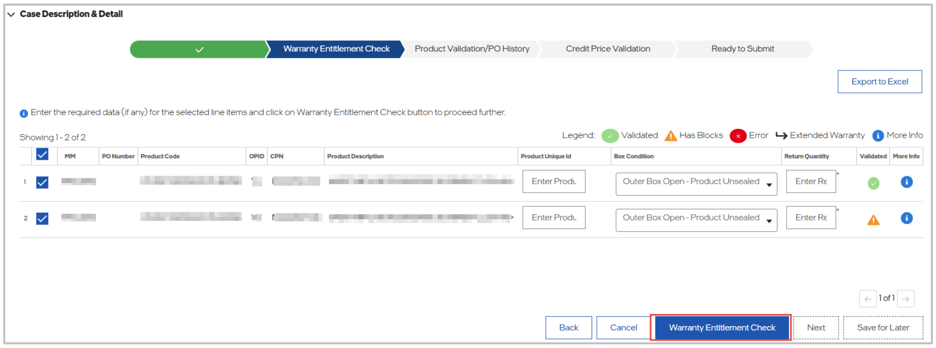


*Warranty Entitlement Check*

8. Once the Warranty Entitlement is complete, click **Next'** to go to the 'Product validation screen'.

**Note:**
Next, the detailed steps for Warranty Entitlement Check, Product Validation, Credit Price Validation and Allowance Validation (only for Stock Rotation related to Distributors) are shown in the next pages. Please view by the Service Types.

For the next steps, select a service type to view the details:

Technical

Stock Rotation

Quality

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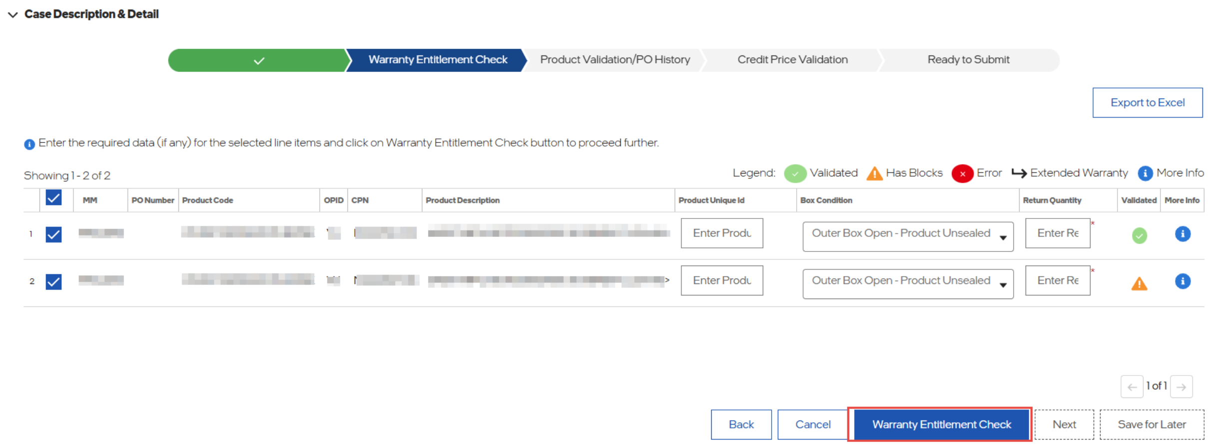
## Service Type: Technical

### Warranty Entitlement Check: Technical

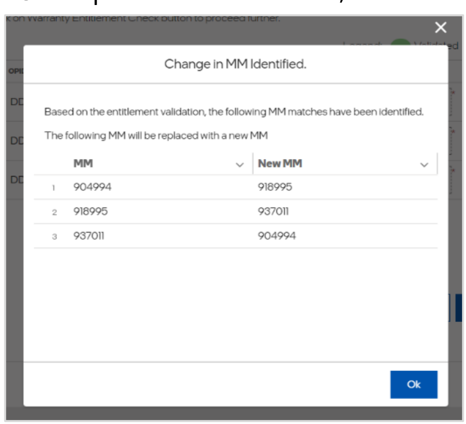
> The following steps are applicable when the **Service Type** is set to **Technical**. Click to view steps for [Stock Rotation]() or [Quality]().

1. Enter the Product Unique ID for the line items in the UI.




*Warranty Entitlement Check*

2. Clicking '**Warranty Entitlement Check**' validates the warranty dates and CEP logic. If validation fails, the affected items will be disabled, and an error message will appear in the **'i'** icon. Items with ULT values paired with another identical ULT will be marked as **Extended Warranty** (EW line items).
3. If the MM (product) in the response does not match the current MM, a popup will notify you of the MM replacement. Click **OK** to proceed. Otherwise, it will halt the process.




*Change in MM notification via pop-up*

4. After the Warranty Entitlement Check, click '**Next**' button. If there is any additional required, information needed, an asterisk (*) will appear beside the ULT, CPN, or both in the respective columns.

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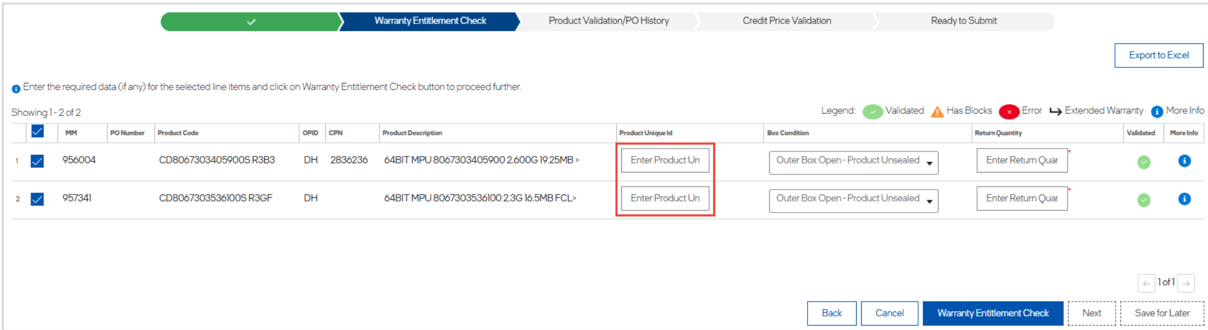

*Warranty Entitlement Check*

5. Enter the ULT for required line items and click '**Warranty Entitlement Check**' again.
6. CPN is mandatory but if it is not available, you cannot proceed with that line item.
7. The Warranty Entitlement Check returns result with the Base Warranty Start Date, Base Warranty End Date, Credit Period Count, and other warranty details.
8. Once everything is complete in this step, click either '**Next**' or '**Save for Later**' button.

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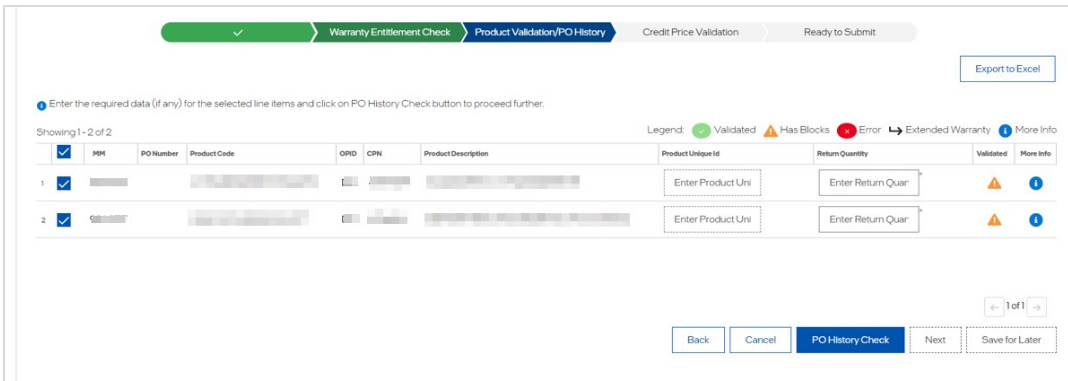
## Product Validation for Technical

> ℹ The following steps are applicable when the **Service Type** is set to **Technical** only. Click to view steps for [Stock Rotation]() or [Quality]().

1. In this step, the focus is on the Product Validation/PO History Check stage, as shown especially when PO number is not entered.




*Product Validation/PO History Check*

2. You need to click on the **PO History Check** button. Until the PO History check is completed, you cannot proceed further. The PO column will be updated. Otherwise, you may manually enter PO numbers for each valid line item into the designated input box. These manually entered PO numbers will be validated too.
3. Once all validations are completed, click on the **Next** button to move to the next stage or click **Save for Later** to save the current state of the case.

> **Note 1: NPR Rule Check**
> When the remedy is **'NPR-Credit,'** an additional validation check is performed after the PO History check. If the validation fails, the line item will be disabled, and then you will receive an error message: **"This product is not eligible for this return reason."**
> **Note 2 : PO Replacement**
> For any line item already containing a PO number, and there is a duplicate, a popup will be prompted for the PO number replacement. If you click **OK**, you can proceed further. Otherwise, it will be a hard stop for the respective line items, which will then be disabled.

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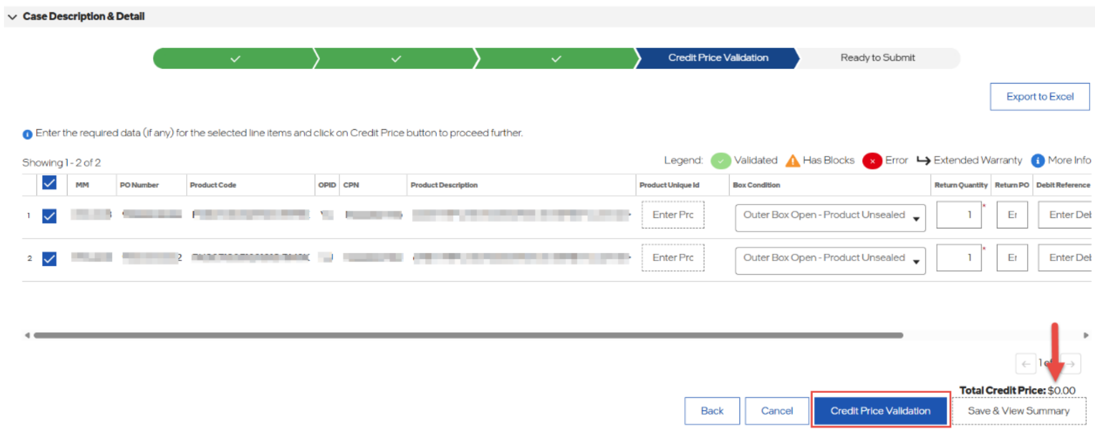
## Credit Price Validation: Technical

The following steps are applicable when the **Service Type** is set to **Technical** only. Click to view steps for [Stock Rotation]() or [Quality]().

1. Once you click the **Next** button from the previous step, the path will highlight the **Credit Price Validation** stage, and the relevant details will be displayed.




*Credit Price Validation*

2. Click on the '**Credit Price Validation**' button to trigger the validation and to populate the Total Credit Price right above the buttons.
   **Note**: If there is no credit price listed upon validation, you can still proceed with case submission, but the case status will be set to Pending Agent Action.
3. After validating the credit price, click '**Save and View Summary**' button to continue to the next step.

Go to **Save and View Summary Steps**

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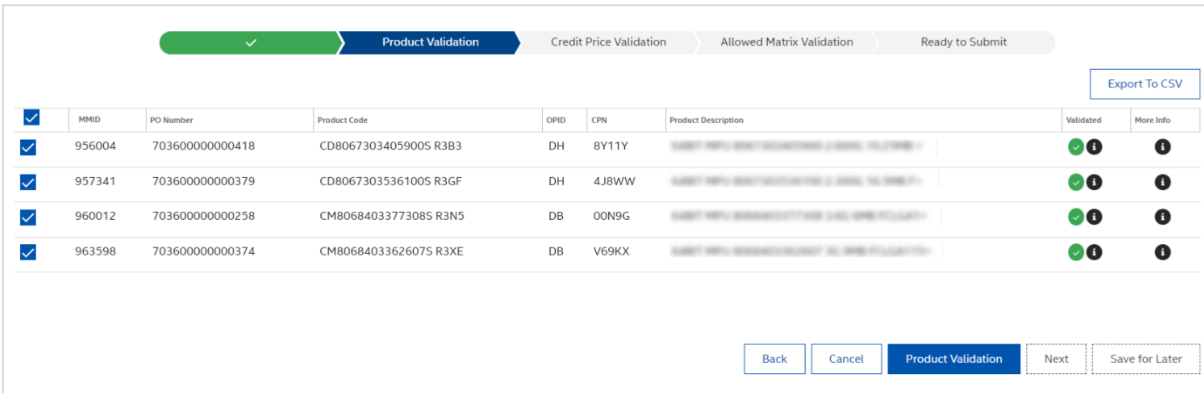
## Service Type: Stock Rotation

### Product Validation for Stock Rotation

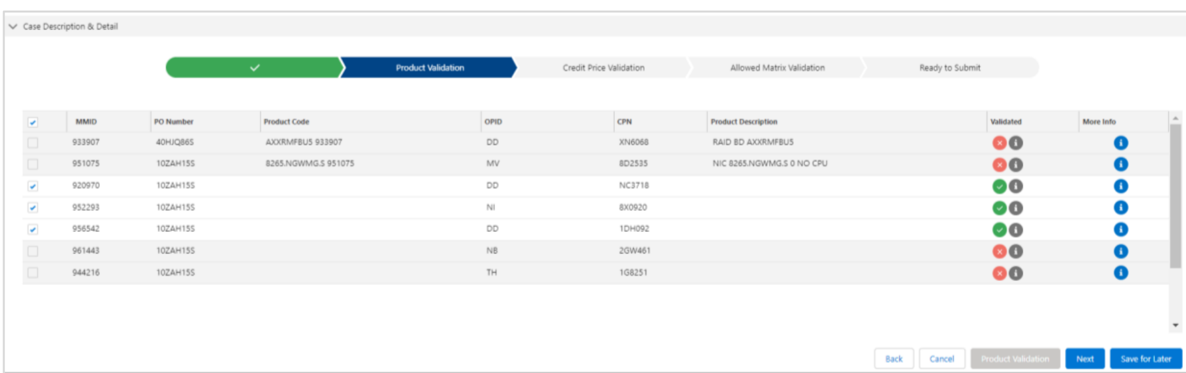
The following steps are applicable when the **Service Type** is set to **Stock Rotation** only. Click to view steps for [Technical]() or [Quality]().

Note that there may be slight discrepancy in the images with no compromises to the steps.




*Product Validation interface*

1. Upon successful Product Validations, the line-item table's "validated" column displays "success" in green.
2. If any line item fails validation, it displays a validation message, and the "Validated" column shows “X” in red.




*Example of line items that has failed the validation*

3. Clicking on the ‘**Next**’ button proceeds to the next phase called ‘**Credit Price Validation**’.

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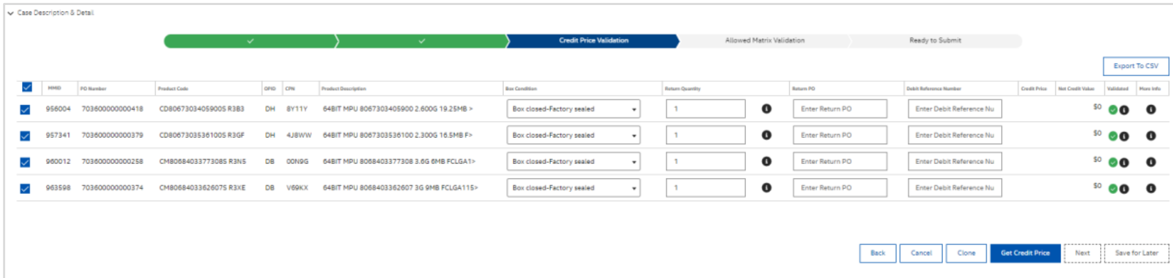
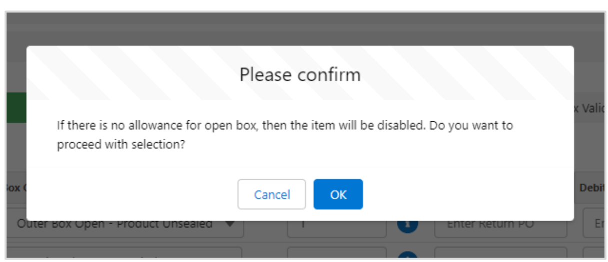
## Credit Price Validation: Stock Rotation

> The following steps are applicable when the **Service Type** is set to **Stock Rotation** only. Click to view steps for [Technical]() or [Quality]().




*Credit Price Validation*

1. In the “Credit Price Validation” section, the "Get Credit Price" button enabled for all selected line items.
2. It is mandatory to enter the Return Quantity for each line item, while Return PO and Debit Reference number are optional fields.
3. Upon clicking the ‘**Get Credit Price**’ button, the price data is retrieved and populated for respective line items.
4. If no credit price value is associated, then the credit price is blank and the net credit price is shown as ‘$0’. You can submit the case, but its status will be ‘**Pending Agent Action’**.
5. The ‘Net credit Value’ of each valid line item is calculated as the ‘Return Quantity’ multiplied by the ‘Credit Price’ and displayed in the ‘Net credit value’ column.
6. There is also the option to select the ‘Box Condition’ of each line item, with the default condition being ‘Box closed – Factory sealed’. If you select ‘Outer Box Opened – Product Unsealed’, the following prompt is displayed:




*Prompt when customer selects “Outer Box Opened – Product Unsealed”*

7. If the box condition is set as ‘Outer Box Opened – Product Unsealed’ and the “Open Box Allowance” is unavailable, the line item will be disabled.
8. After successfully obtaining the credit price, the ‘**Next’** and ‘**Save for later**’ buttons are enabled. Proceed to the next section or save the case for later editing accordingly.

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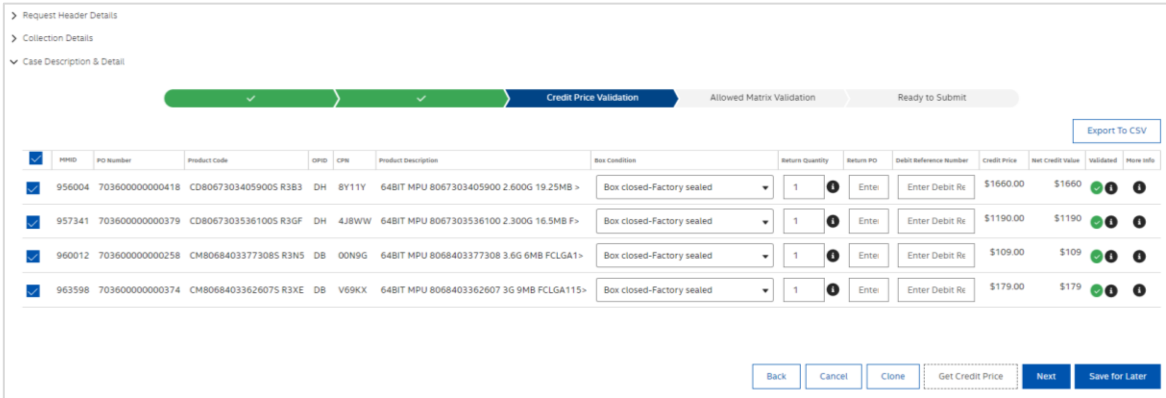

*Next and Save for Later button is enabled once credit price is obtained*

**Note: Credit Validation Through the Day**

Once credit price validation is completed for particular line item(s), the credit price validation button will be disabled, and the obtained credit price value will be considered valid for the current day. Therefore, if you edit the case or returns to the 'Credit Validation' stage on the same day, you will not need to validate the same line items again.

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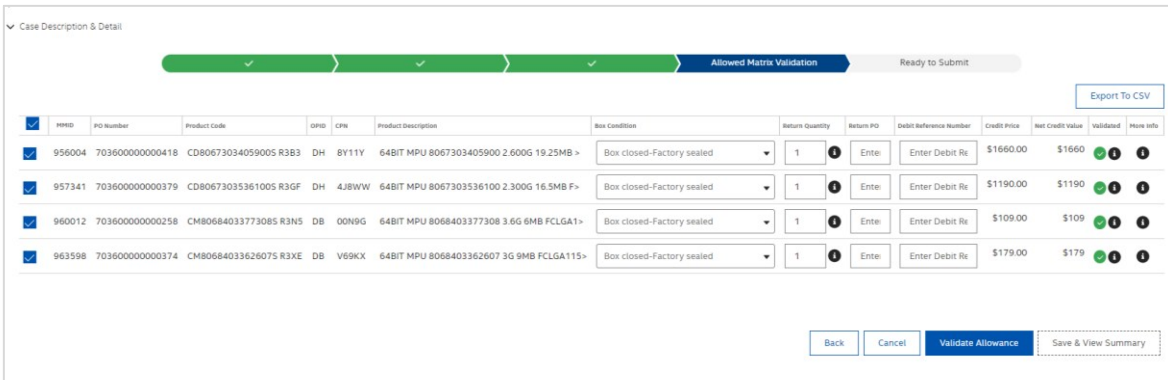
## Allowance Validation: Stock Rotation

The following steps are applicable when the **Service Type** is set to **Stock Rotation** only. Click to view steps for [Technical] or [Quality].

Upon clicking the '**Next**' button in the Credit Price Validation section, the "Allowed Matrix Validation" page loads.

1. Click '**Validate Allowance**' to start the Stock Rotation Allowance validation process.



*Validate Allowance*

2. If the "Net Credit Value" of the line item exceeds the available "Stock Rotation Allowance", an error message is displayed in the validated column. You are then allowed to adjust the return quantity accordingly to ensure compliance with the allowance.
3. To confirm your submission, please click on '**Save & View Summary**' to proceed to the next step.

## Service Type: Quality

### Warranty Entitlement Check: Quality

> The following steps are applicable when the **Service Type** is set to **Quality**. Click to view steps for [Technical]() or [Stock Rotation]().

#### Remedy Type: NPR-Credit

1. Enter the Product Unique ID for the line items in the UI.

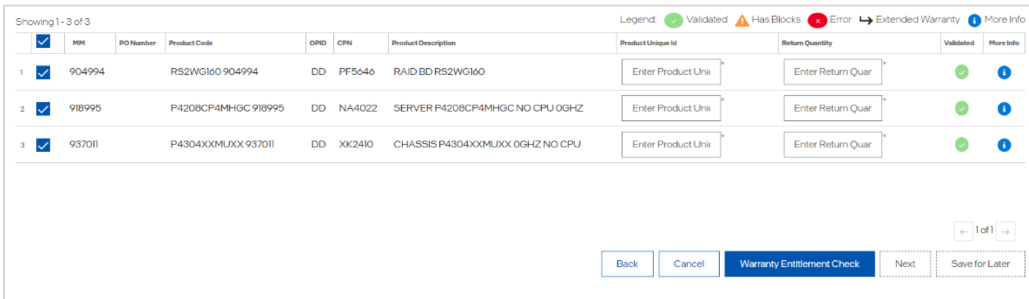
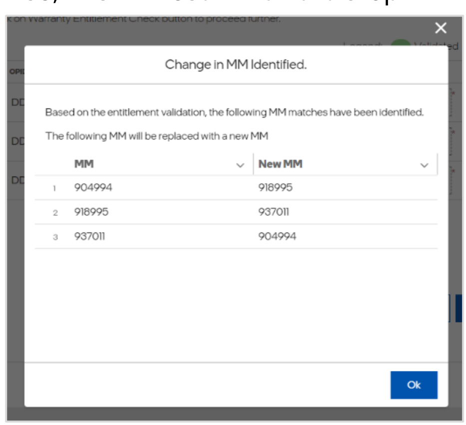


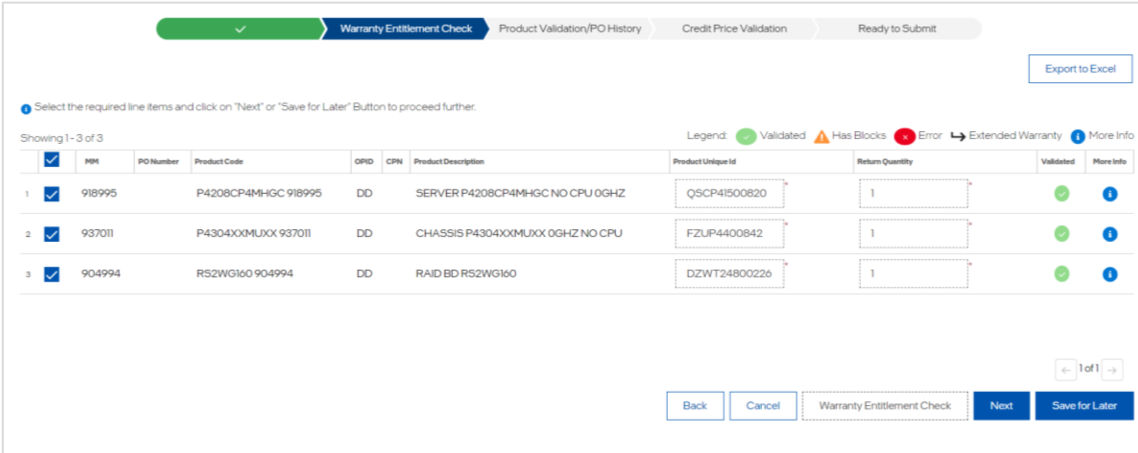

*Image 21: Product Unique ID should be entered to perform warranty entitlement check.*

2. Should any of the selected line items lack a ULT or contain duplicate ULTs, then you will receive a notification via a toast message upon clicking the 'Warranty Entitlement Check' button.
3. Clicking the '**Warranty Entitlement Check**' button validates the Product Unique IDs of line items. Invalid or inactive IDs will disable the corresponding line items in the UI. If there is a mismatch in the MM (product) between the response and the current MM, a popup will notify about the replacement of MMs.
4. Click '**OK**' to proceed; otherwise, this will result in a hard stop.




*Change in MM notification via pop-up*

5. Repeat the steps with the other required line items.



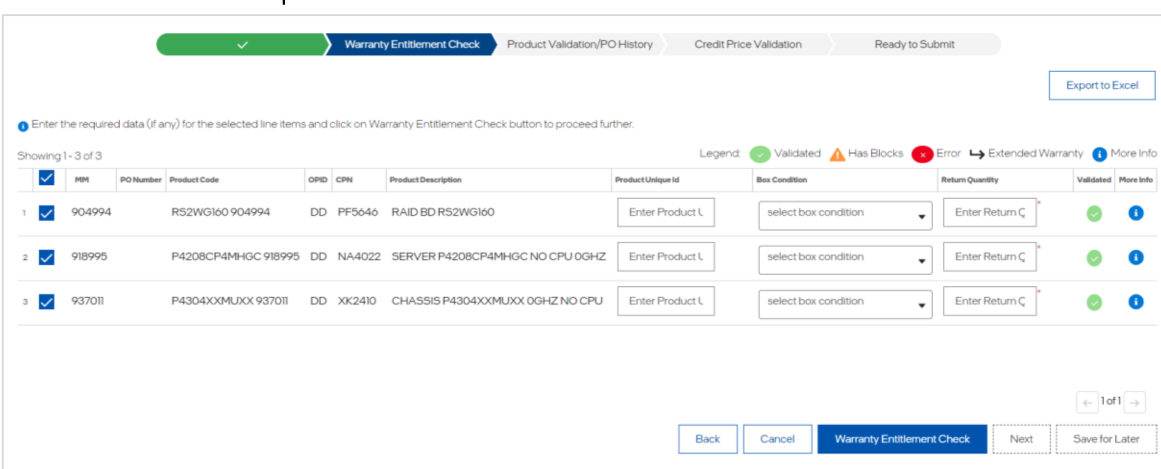

*Next button enabled to proceed to next step*

6. Click the '**Next**' button to proceed. The line items will be validated. If any ULT or CPN fields in specific line items are required, a toast message will notify you, prompting them to enter the mandatory fields before proceeding.

> **Note:**
> For Remedy Type: NPR-Credit, box conditions will not be visible in the line items.

### Remedy Type: Credit

1. Enter the Product Unique ID for the line items in the UI.




*Product Unique ID should be entered to perform warranty entitlement check*

2. Click the **Warranty Entitlement Check** button to validate. The ULT number must be 6 to 40 characters long, or you will receive a toast notification.

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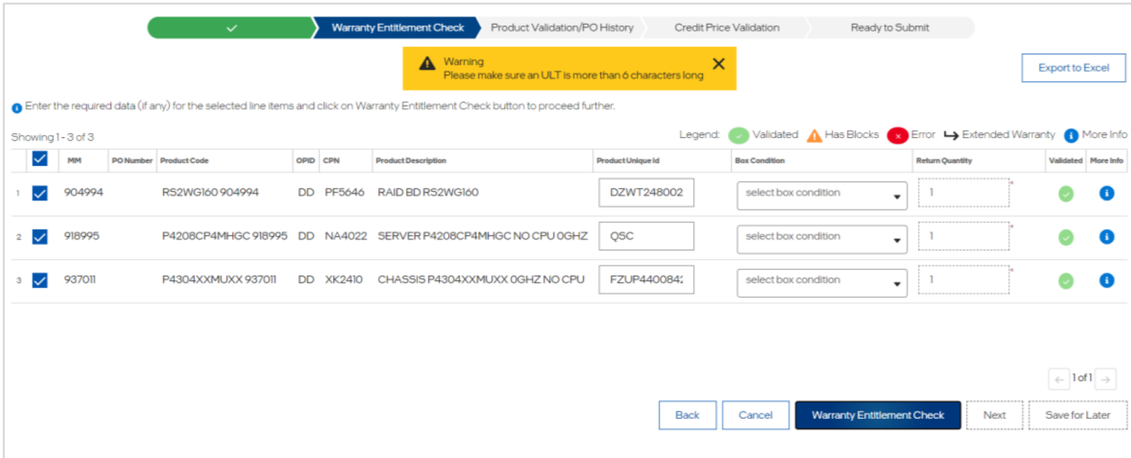
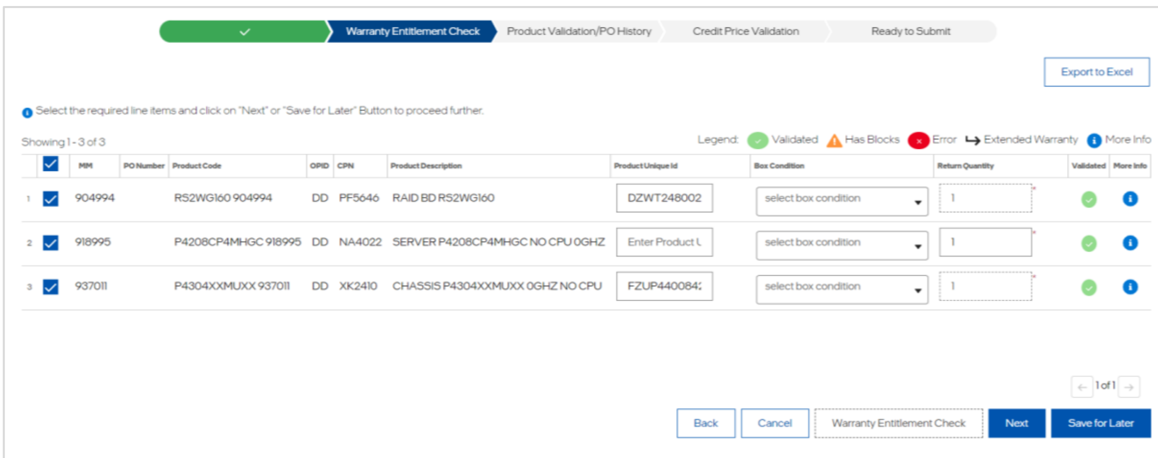
intel.




*Warning notification when the ULT number does not meet the requirement*

3. Repeat the steps with the other required line items.




*Customer can continue to the next step*

4. Click the '**Next**' button to proceed. The line items will be validated. If any ULT or CPN fields in specific line items are required, a toast message will notify you, prompting them to enter the mandatory fields before proceeding.

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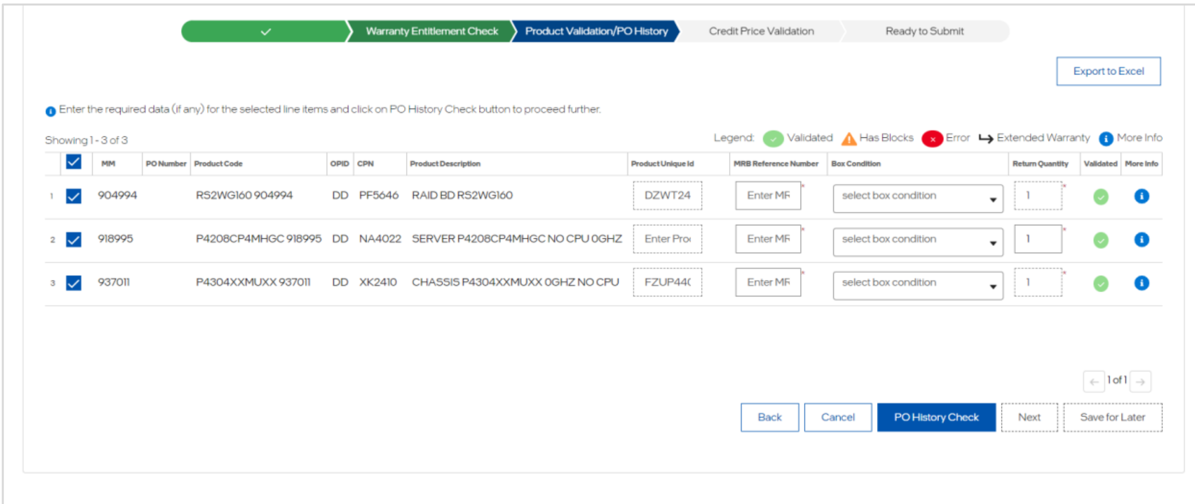
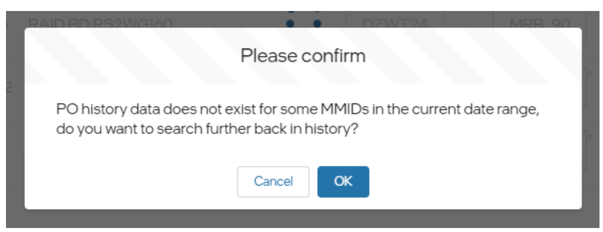
## Product Validation for Quality

> The following steps are applicable when the **Service Type** is set to **Quality** only. Click to view steps for [Technical](#) or [Stock Rotation](#).




*Product Validation / PO History Check*

1. Enter the MRB Reference number for the line items (The MRB Reference number can have a maximum length of 30 characters) If any of the selected line items are missing an MRB Reference number, you will be notified via a toast message upon clicking the **PO History Check** button.
2. Line items with invalid MRB Reference numbers will be disabled in the UI, and an error message will be displayed via the 'i' icon.
3. If PO numbers are retrieved for all required line items, proceed further.
4. If PO numbers are not retrieved for all selected line items, a confirmation popup will be shown to you. If you agree, another validation will be done.




*Confirmation dialog box*

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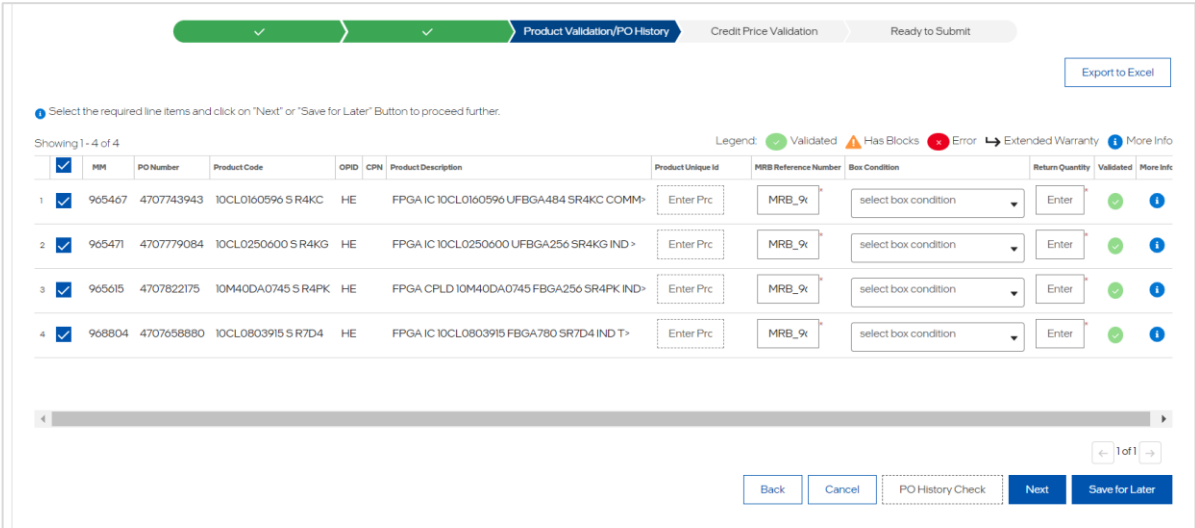


*Product Validation / PO History Check*

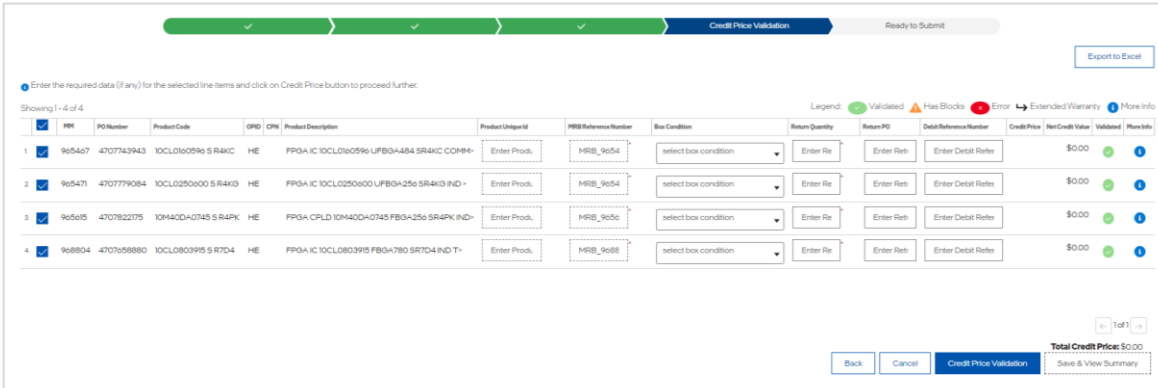
> **Note: PO Replacement**
> For any line item that already contains a PO number, if a new PO number is available in system, then all existing PO numbers will be replaced with the newly received PO numbers. A popup will notify you of the PO number replacement. If you **OK**, you can proceed further; otherwise, the respective line items will be disabled, resulting in a hard stop.

5. Once all validations are completed, proceed to the next step by clicking the **Next** button, which will navigate them to the **Credit Price Validation** screen.

## Credit Price Validation for Quality

The following steps are applicable when the **Service Type** is set to **Quality** only. Click to view steps for [Technical]() or [Stock Rotation]().

1. In the "Credit Price Validation" step, you will see the Credit Price Validation button enabled for all selected line items.

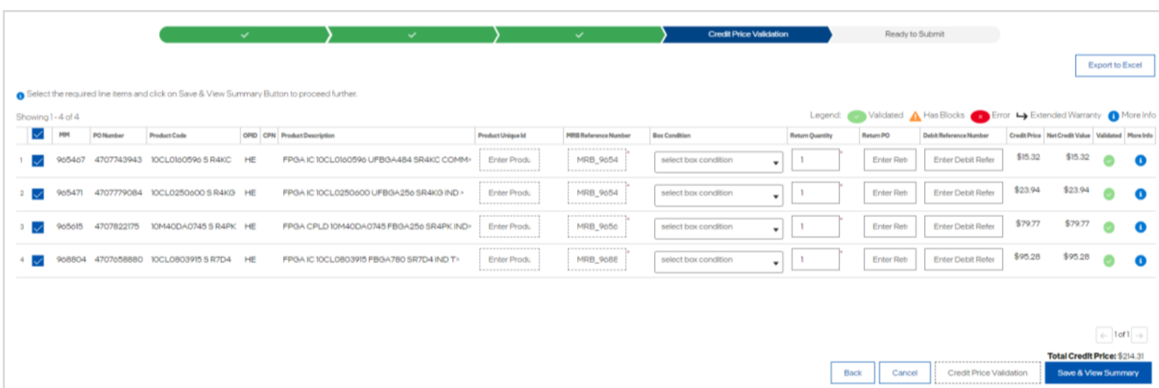



*Credit Price Validation*

2. Mandatory Fields: You must enter the **Return Quantity** for each line item, as it is a required field. The Return PO and Debit Reference Number fields are optional.
3. If no credit price value is obtained, you still proceed with case submission, but the case status will be set to Pending Agent Action.

**Reference: Net Credit Value Calculation**

The Net Credit Value for each valid line item is calculated as Return Quantity * Credit Price and is displayed in the Net Credit Value column.




*Net credit column*

4. Proceed to next step by clicking on 'Save & View Summary' button. You can also select the Box Condition if you want to only select selective line items to proceed.

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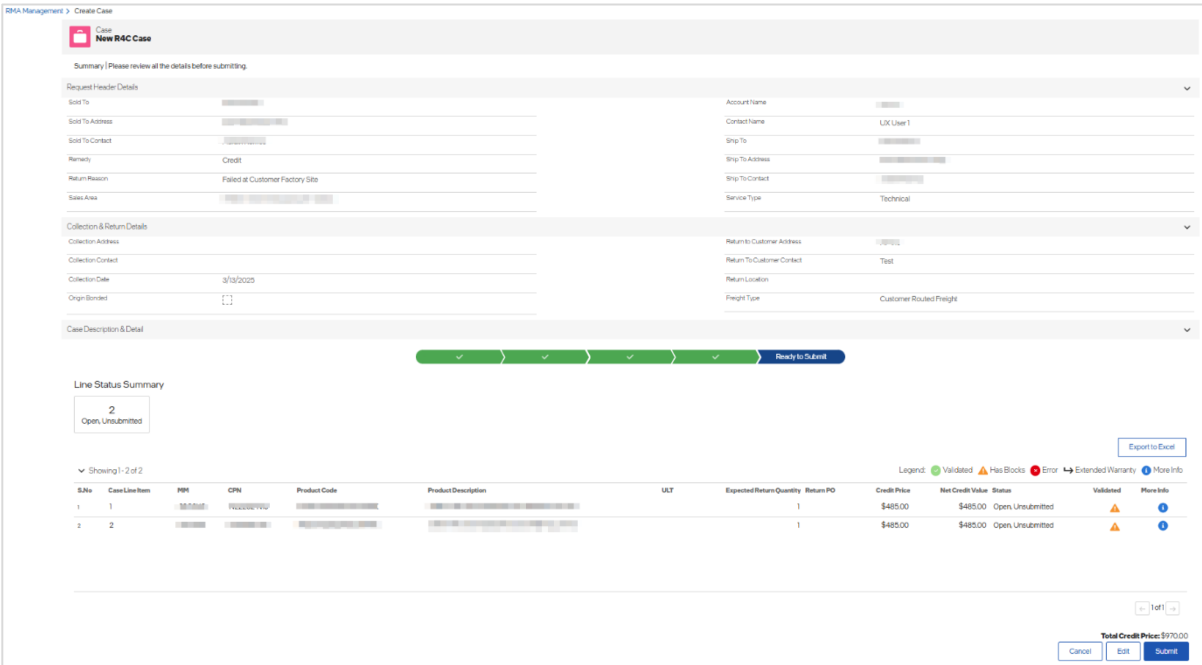
## View Summary Page

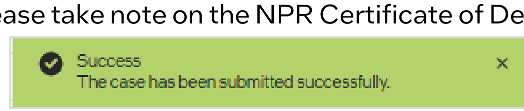
The example in the images may depicts a Service Type. However, similar step applies to all Service Types.

1. If the Validate allowance is successful, the "Save & View Summary" button is enabled.
2. Upon clicking the button, you will be taken to 'Save & View Summary'/'Ready to Submit' page.
3. Review all the case details briefly and confirm if everything is correct before submitting the case.




*Summary of case before submitting for review (Service Type: Technical)*

4. Edit the case again if you want to change any details.
5. Upon clicking the Submit button, the case is submitted with the status "RMA Authorized" or 'Pending Agent Action,' and you will be redirected to the 'Case Detail Page.'
6. If you click on cancel, the case is saved with the status "Open, Unsubmitted," and you are redirected to the home page.
7. If the submission is successful, success toast message appears. For Technical and Quality Service Types, please take note on the NPR Certificate of Destruction (COD) Process.




*Success Toast Message*

## NPR Certificate of Destruction (COD) Process

1. If the selected remedy is NPR – Credit, you must sign a Certificate of Destruction (COD) to successfully submit the case.
2. In a popup screen, click the Submit button, confirming agreement to the COD.

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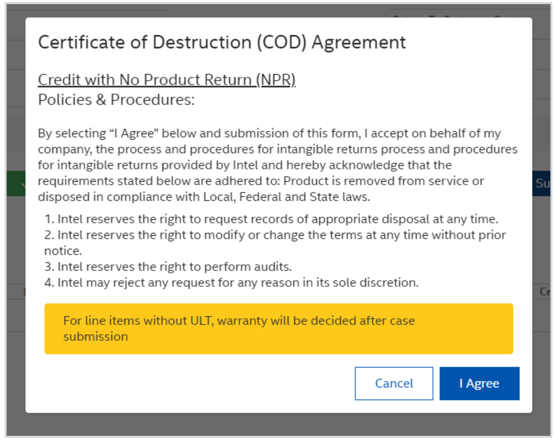
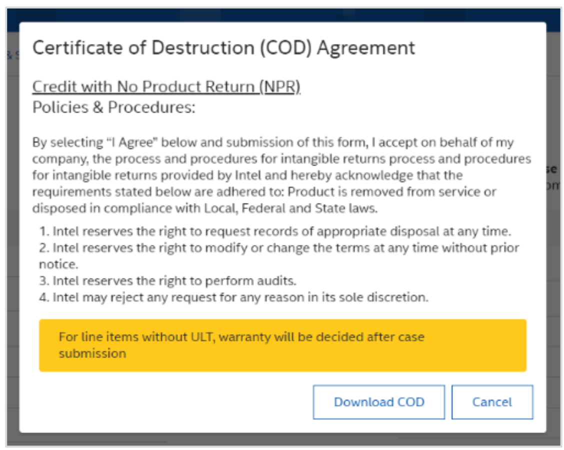


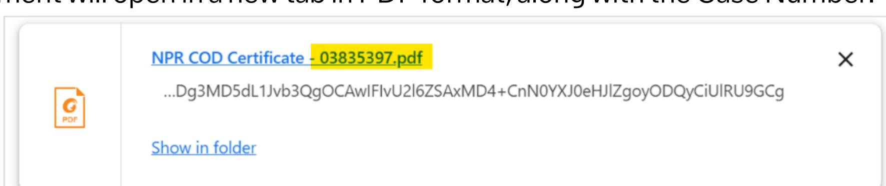

*COD agreement.*

3. The case is submitted only if you agree to the COD by clicking on I Agree.
4. After successful submission, you will be redirected to the Case Detail Page, to view the signed COD agreement.
5. Download the COD Agreement by clicking the Download COD button.




*Click on the Download COD to download the agreement.*

6. The agreement will open in a new tab in PDF format, along with the Case Number.




*Downloaded PDF will have the case number in its naming convention.*

7. After downloading, the file containing the case number in the downloaded PDF is obtained.

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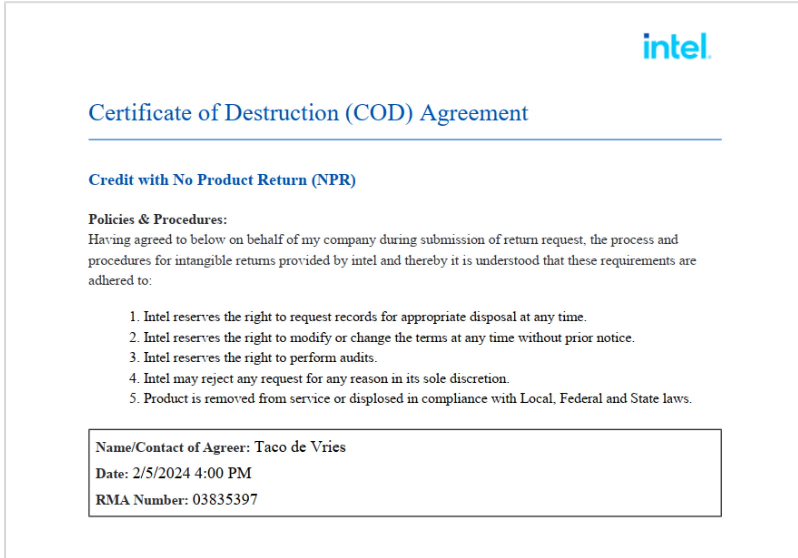


## Certificate of Destruction (COD) Agreement

**Credit with No Product Return (NPR)**

**Policies & Procedures:**
Having agreed to below on behalf of my company during submission of return request, the process and procedures for intangible returns provided by intel and thereby it is understood that these requirements are adhered to:

1. Intel reserves the right to request records for appropriate disposal at any time.
2. Intel reserves the right to modify or change the terms at any time without prior notice.
3. Intel reserves the right to perform audits.
4. Intel may reject any request for any reason in its sole discretion.
5. Product is removed from service or displosed in compliance with Local, Federal and State laws.

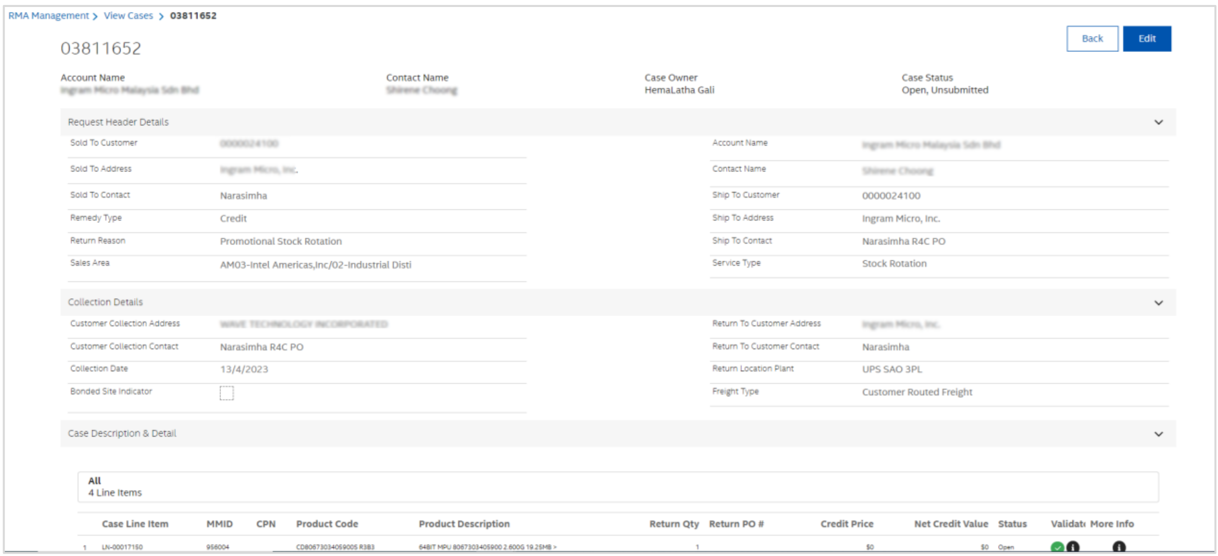
**Name/Contact of Agreer:** Taco de Vries
**Date:** 2/5/2024 4:00 PM
**RMA Number:** 03835397

*Example of the COD Agreement after download.*

## Case View

ℹ The example in the images may depicts a Service Type. However, similar step applies to all Service Types.

1. Once the case is submitted, you will be navigated to the 'Case Detail page' of the submitted case.
2. You can see the case number, account name, contact name, case owner, and case status in the header.




*Case view page*

3. As the case is submitted and moves to RMA Authorized, the detail page is shown without the 'Edit' button.
4. You can see the "Edit" button if the case status is 'Open, Unsubmitted.' When clicked, you will be redirected to the 'Edit Case' window.

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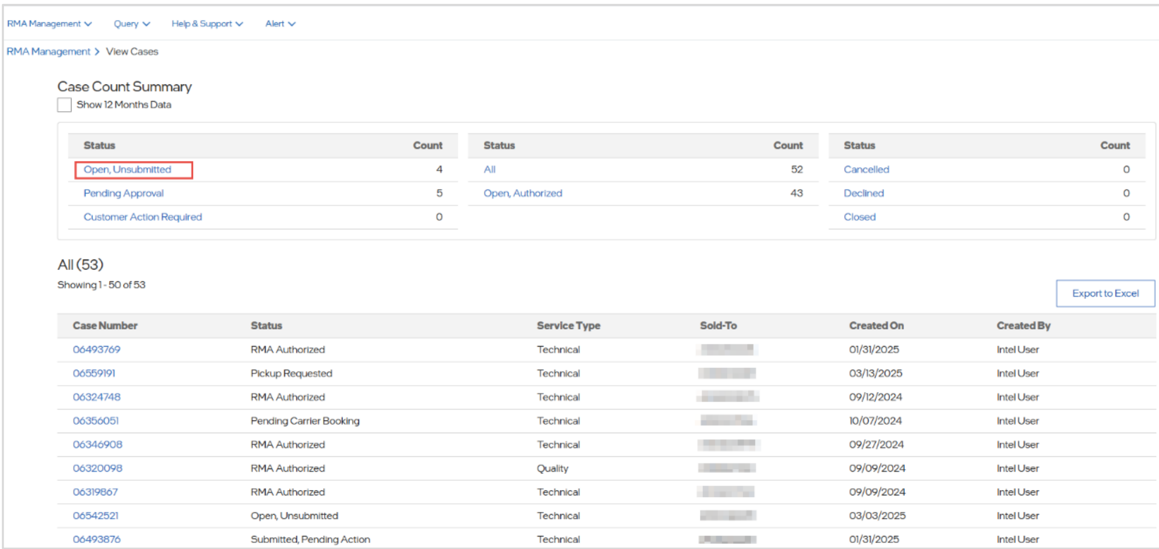
## Case Edit

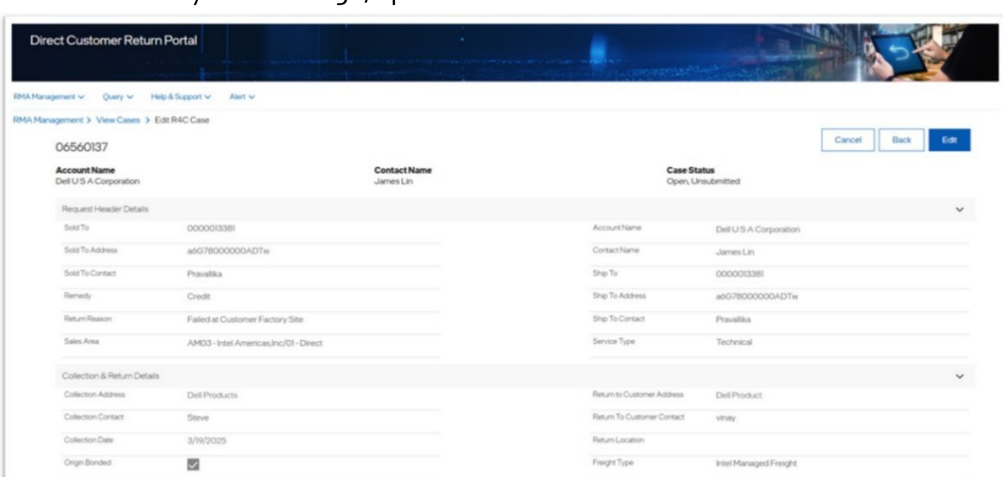
ℹ The example in the images may depicts a Service Type. However, similar step applies to all Service Types.

> **Note: Case editing criteria**
> Case editing is allowed for 'Open, Unsubmitted' cases that are created by you. When the case status is "RMA Authorized," case editing is not allowed. If Intel agent has created a case for you, you may not see the Edit option too.

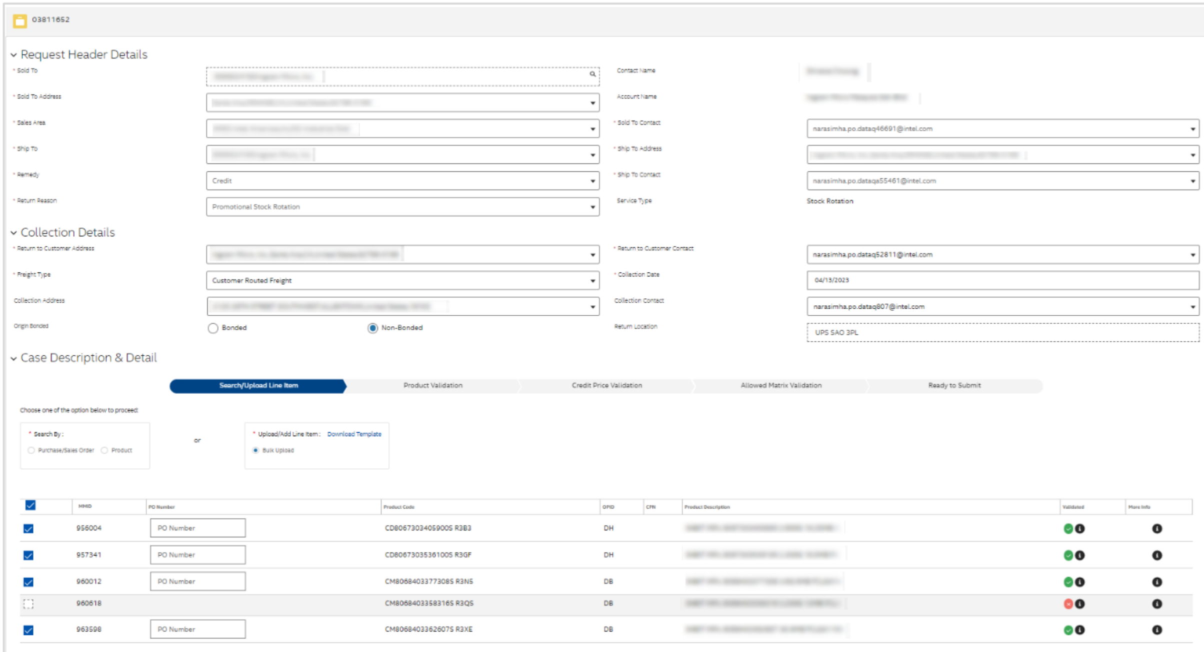



*Case Status*

1. Once you click on the Open, Unsubmitted link, you will see line items with Case Numbers. Click the Case Number that you need to edit.
   - Click **Edit** button to edit case details, with all saved data populated, allowing you to change/update the details.




*Edit button appears for case you created*



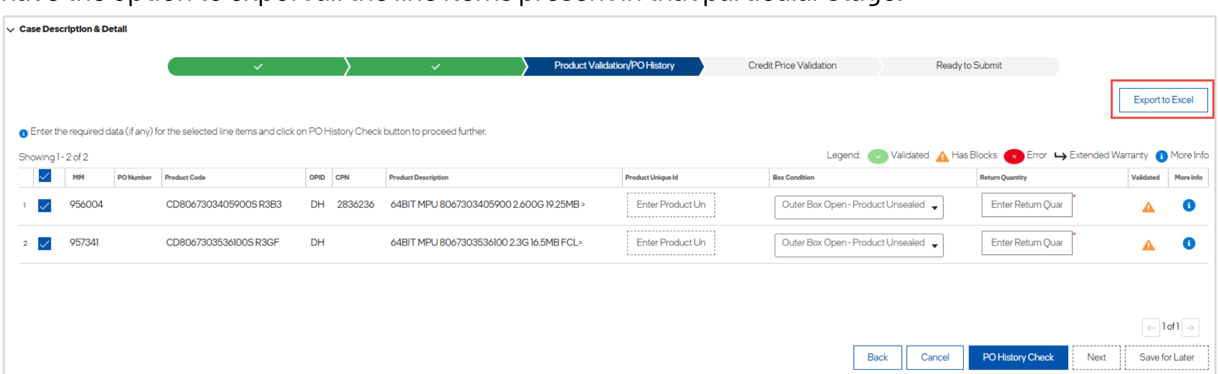

*Case editing form*

2. On Load of Case Edit Page, embargo checks are performed on Collection and Return to Customer addresses.
3. In the Edit Case tab, 'Request Header Details' cannot be edited. You can only edit 'Collection details' fields.
4. In Collection Details, all fields are editable. If the Freight type is changed, all other fields will be refreshed, and values can be selected accordingly.

## Export to Excel

The example in the images may depicts a Service Type. However, similar step applies to all Service Types.

1. In the 'Case details and description' section, where we add and validate the line items, you have the option to export all the line items present in that particular stage.




*Export to Excel Location.*

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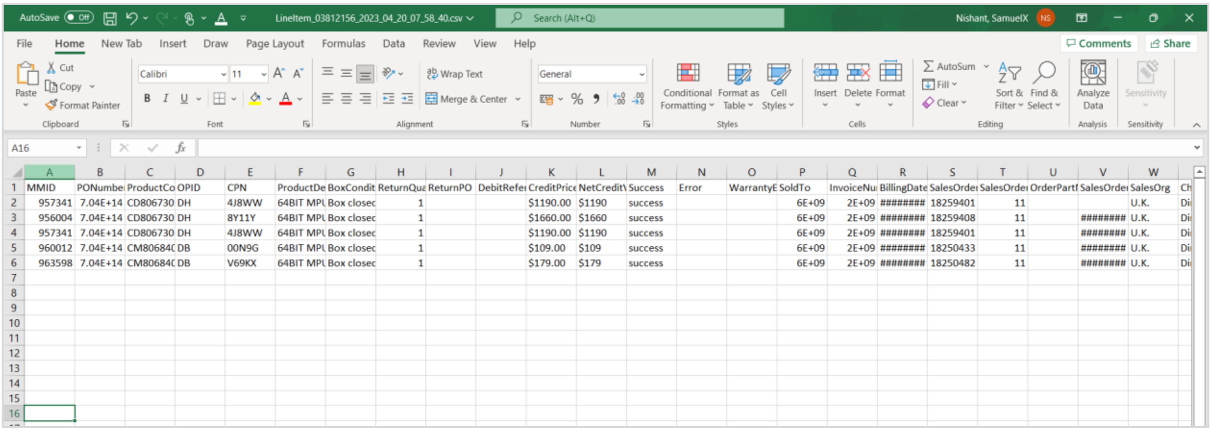
2. When you click on '**Export to Excel**', all the line items present on the screen will be formatted into a CSV, which will then be downloaded automatically.
3. For '**Stock Rotation**', you will be able to see the button in the '**Product validation**', '**Credit price validation**', and '**Allowance matrix validation**' stages.
4. You are allowed to export before and after the validation on that stage. The downloaded file will display the corresponding success and error messages for line items after validation.



*Example of exported data*

5. All the details you can see on the UI will be available in the downloaded sheet, including details shown in the 'More info' icon.

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## Entry Replication

The example in the images may depicts a Service Type. However, similar step applies to all Service Types.

1. You have the option to create additional line items using any previously used MM number.
2. You can do multiple searches and re-trigger the same search multiple times using the same set of data.
3. You should be able to search with the same MM and add multiple line items for the same MM.
4. To make this functionality feasible, the Invoice Number is used to calculate uniqueness. It is a unique number created for each line item.

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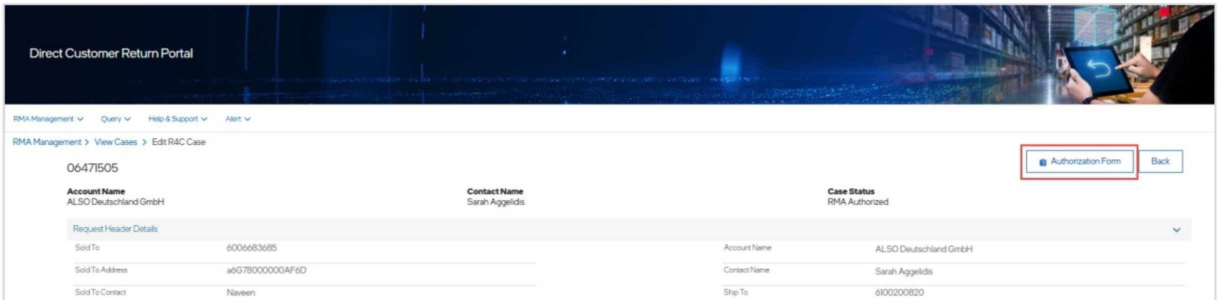
## Authorization Form

The example in the images may depicts a Service Type. However, similar step applies to all Service Types.

1. Once RMA Authorized Cases are created by Intel, you can see the '**Authorization Form**' button on the Case details page.



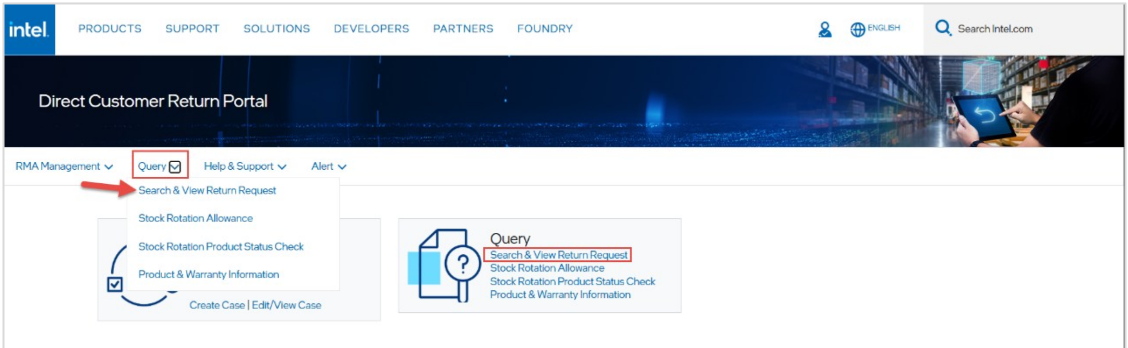

*Authorization Form*

2. Upon clicking the Authorization Form button, the Authorization Form will open in a new tab. You can verify all the data and download the Authorization Form in PDF format.

# Query

## Search & View Return Request

1. From Menu, click 'Query' > 'Search & View Return Request'.

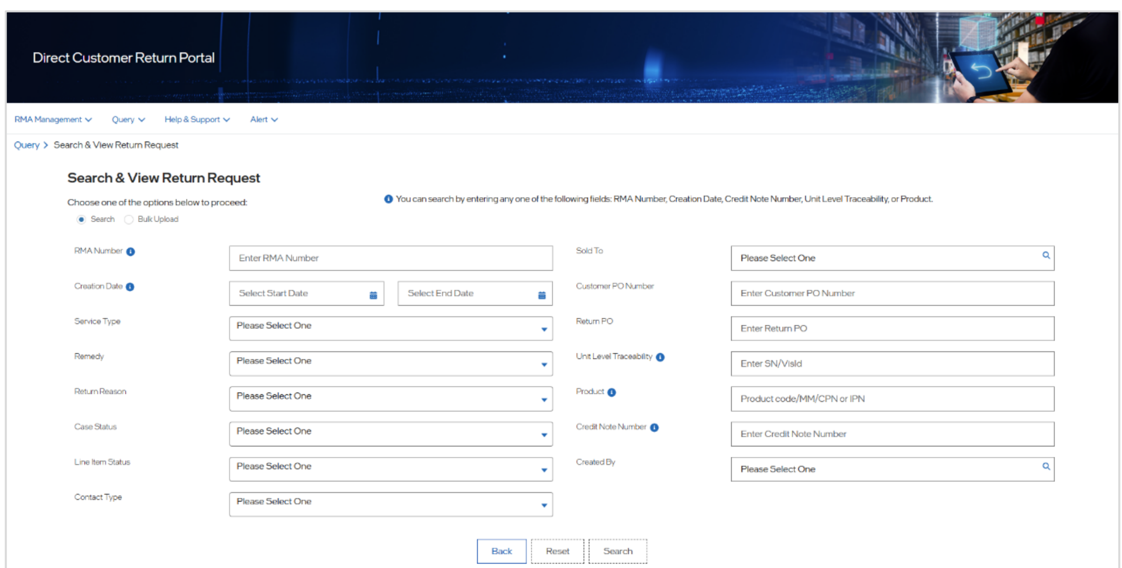



*Search & View Return Request*

2. The Search Query is further divided into two options: [Search](#) and [Bulk Upload](#).

## Search

- You can search for cases by entering single or multiple comma-separated values in one or more fields. The search button will be disabled until you enter data in at **least one field**.
-




*Search Query*

1. **Search Criteria:**
    a. The Search button remains disabled until at least one field is filled.
    b. **RMA Number** (Comma-Separated Values): Users can enter multiple case numbers.

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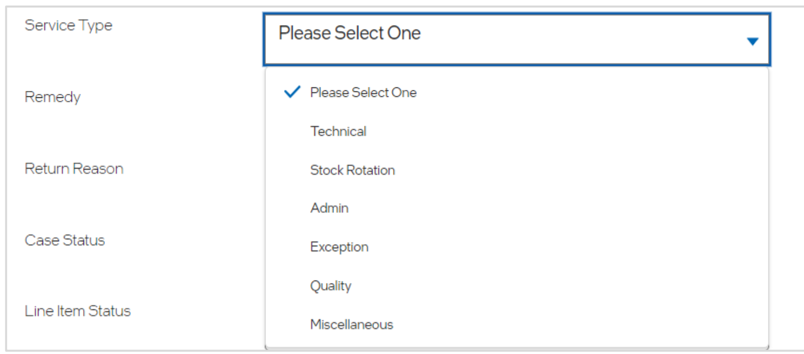
c. **Sold To:** Enter CMFs to retrieve previous cases related to the specified CMF.
d. **Creation Date:** Can be a maximum of six months from the current date.
e. **Customer PO Number:** Allows searching by Customer PO Number.
f. **Return PO**: Allows searching by Return PO.
g. **ULT:** Allows searching at the line-item level.
h. **Product:** MM, CPN, or Product Code can be searched at the line-item level.
i. **Service Type:** Displays only the options applicable to the user.

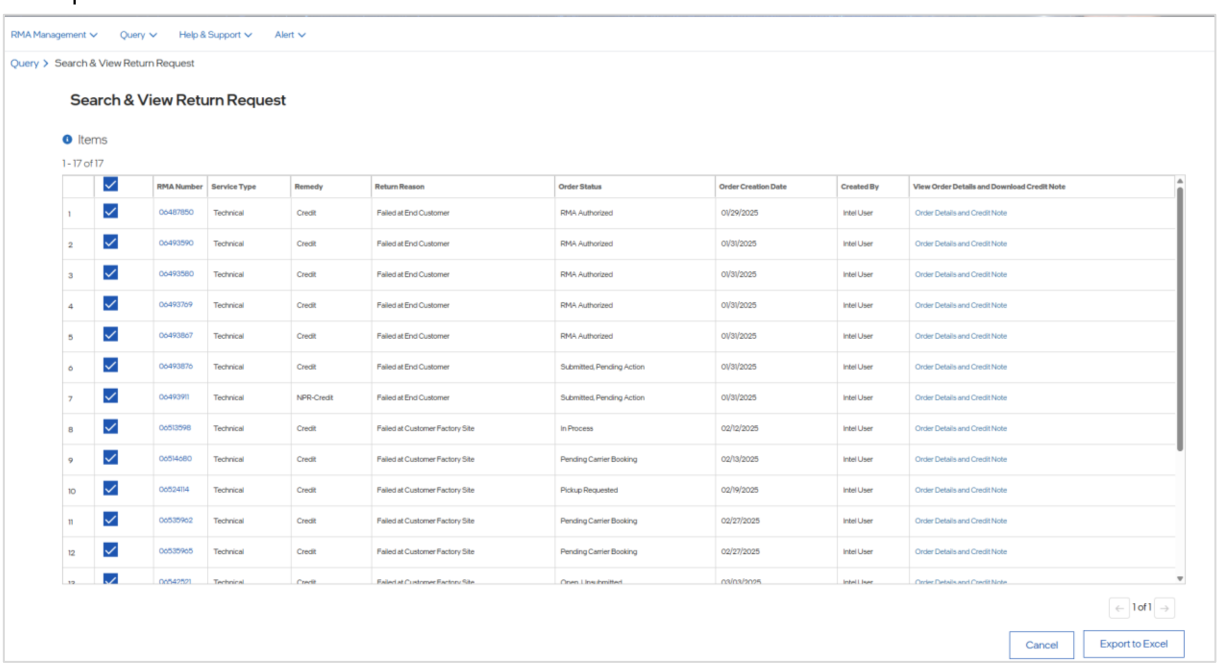



*Select Service Type from the dropdown.*

2. Once you enter the values and clicks the search button, results based on the given input combinations will be fetched and displayed in the table.

> **Note:** You can only see cases that they have created.

3. Example of search data:




| | RMA Number | Service Type | Remedy | Return Reason | Order Status | Order Creation Date | Created By | View Order Details and Download Credit Note |
|---|---|---|---|---|---|---|---|---|
| 1 | 06487850 | Technical | Credit | Failed at End Customer | RMA Authorized | 01/29/2025 | Intel User | Order Details and Credit Note |
| 2 | 06493590 | Technical | Credit | Failed at End Customer | RMA Authorized | 01/31/2025 | Intel User | Order Details and Credit Note |
| 3 | 06493580 | Technical | Credit | Failed at End Customer | RMA Authorized | 01/31/2025 | Intel User | Order Details and Credit Note |
| 4 | 06493769 | Technical | Credit | Failed at End Customer | RMA Authorized | 01/31/2025 | Intel User | Order Details and Credit Note |
| 5 | 06493867 | Technical | Credit | Failed at End Customer | RMA Authorized | 01/31/2025 | Intel User | Order Details and Credit Note |
| 6 | 06493876 | Technical | Credit | Failed at End Customer | Submitted, Pending Action | 01/31/2025 | Intel User | Order Details and Credit Note |
| 7 | 06493911 | Technical | NPR-Credit | Failed at End Customer | Submitted, Pending Action | 01/31/2025 | Intel User | Order Details and Credit Note |
| 8 | 06513598 | Technical | Credit | Failed at Customer Factory Site | In Process | 02/12/2025 | Intel User | Order Details and Credit Note |
| 9 | 06514680 | Technical | Credit | Failed at Customer Factory Site | Pending Carrier Booking | 02/13/2025 | Intel User | Order Details and Credit Note |
| 10 | 06524114 | Technical | Credit | Failed at Customer Factory Site | Pickup Requested | 02/19/2025 | Intel User | Order Details and Credit Note |
| 11 | 06535962 | Technical | Credit | Failed at Customer Factory Site | Pending Carrier Booking | 02/27/2025 | Intel User | Order Details and Credit Note |
| 12 | 06535965 | Technical | Credit | Failed at Customer Factory Site | Pending Carrier Booking | 02/27/2025 | Intel User | Order Details and Credit Note |

*Example of search data*

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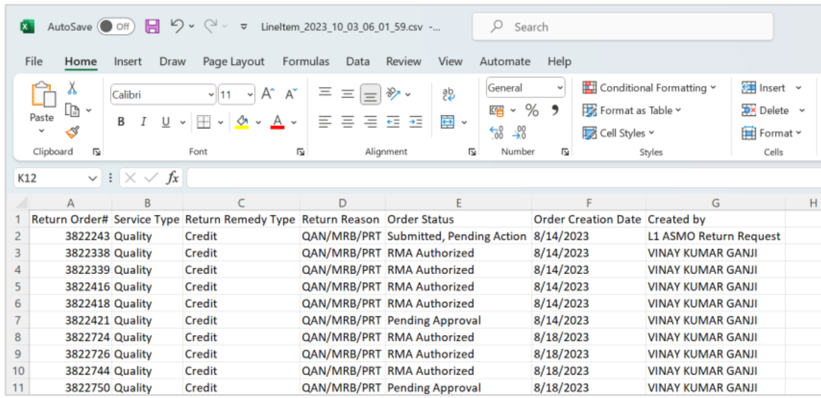
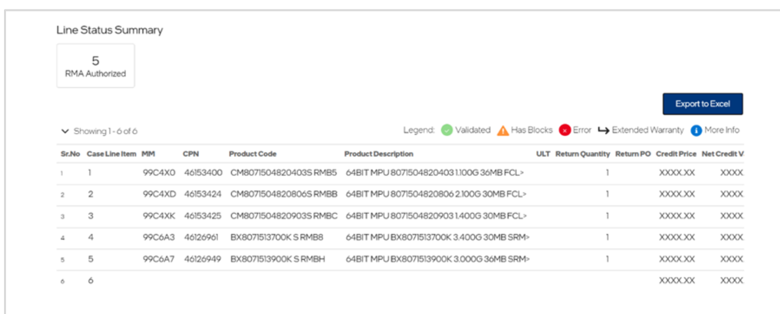
4. If no data is found, you will be notified with an error message in the table. On click of the '**Cancel**' button, you will be navigated back to the Search Query page where you can fill in the details again.
5. Download all the data in the table as a CSV file by clicking the '**Export To Excel**' button located at the bottom of the table. The data will be formatted into CSV and downloaded automatically.



| | A | B | C | D | E | F | G |
|---|---|---|---|---|---|---|---|
| 1 | Return Order# | Service Type | Return Remedy Type | Return Reason | Order Status | Order Creation Date | Created by |
| 2 | 3822243 | Quality | Credit | QAN/MRB/PRT | Submitted, Pending Action | 8/14/2023 | L1 ASMO Return Request |
| 3 | 3822338 | Quality | Credit | QAN/MRB/PRT | RMA Authorized | 8/14/2023 | VINAY KUMAR GANJI |
| 4 | 3822339 | Quality | Credit | QAN/MRB/PRT | RMA Authorized | 8/14/2023 | VINAY KUMAR GANJI |
| 5 | 3822416 | Quality | Credit | QAN/MRB/PRT | RMA Authorized | 8/14/2023 | VINAY KUMAR GANJI |
| 6 | 3822418 | Quality | Credit | QAN/MRB/PRT | RMA Authorized | 8/14/2023 | VINAY KUMAR GANJI |
| 7 | 3822421 | Quality | Credit | QAN/MRB/PRT | Pending Approval | 8/14/2023 | VINAY KUMAR GANJI |
| 8 | 3822724 | Quality | Credit | QAN/MRB/PRT | RMA Authorized | 8/18/2023 | VINAY KUMAR GANJI |
| 9 | 3822726 | Quality | Credit | QAN/MRB/PRT | RMA Authorized | 8/18/2023 | VINAY KUMAR GANJI |
| 10 | 3822744 | Quality | Credit | QAN/MRB/PRT | RMA Authorized | 8/18/2023 | VINAY KUMAR GANJI |
| 11 | 3822750 | Quality | Credit | QAN/MRB/PRT | Pending Approval | 8/18/2023 | VINAY KUMAR GANJI |

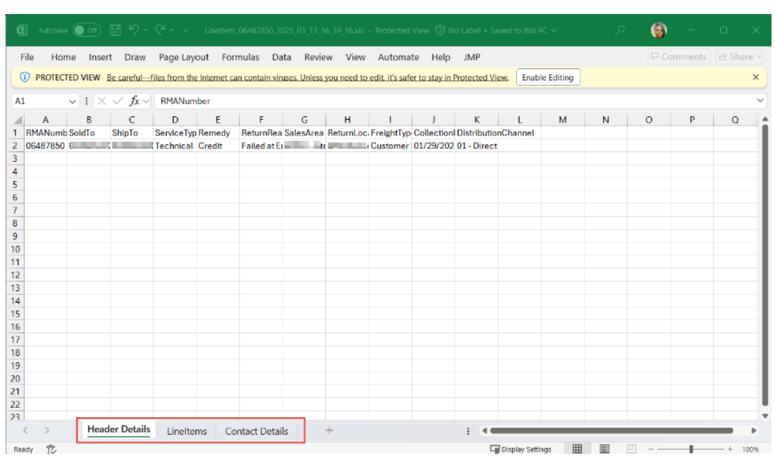
*Example of exported data*

6. Clicking on a Case Number opens full case details.
7. You can also export case details (Header Details, Line Items and Contact Details) to Excel, with separate tabs for each.




| Sr.No | Case Line Item | MM | CPN | Product Code | Product Description | ULT | Return Quantity | Return PO | Credit Price | Net Credit V |
|---|---|---|---|---|---|---|---|---|---|---|
| 1 | 1 | 99C4X0 | 46153400 | CM8071504820403S RMB5 | 64BIT MPU 8071504820403 1.100G 36MB FCL> | | 1 | | XXXX.XX | XXXX |
| 2 | 2 | 99C4XD | 46153424 | CM8071504820806S RMBB | 64BIT MPU 8071504820806 2.100G 30MB FCL> | | 1 | | XXXX.XX | XXXX |
| 3 | 3 | 99C4XK | 46153425 | CM8071504820903S RMBC | 64BIT MPU 8071504820903 1.400G 30MB FCL> | | 1 | | XXXX.XX | XXXX |
| 4 | 4 | 99C6A3 | 46126961 | BX8071513700K S RMB8 | 64BIT MPU BX8071513700K 3.400G 30MB SRM> | | 1 | | XXXX.XX | XXXX |
| 5 | 5 | 99C6A7 | 46126949 | BX8071513900K S RMBH | 64BIT MPU BX8071513900K 3.000G 36MB SRM> | | 1 | | XXXX.XX | XXXX |
| 6 | 6 | | | | | | | | XXXX.XX | XXXX |

*Case Number Line Item Details*




*Exported Excel File with the respective tabs*

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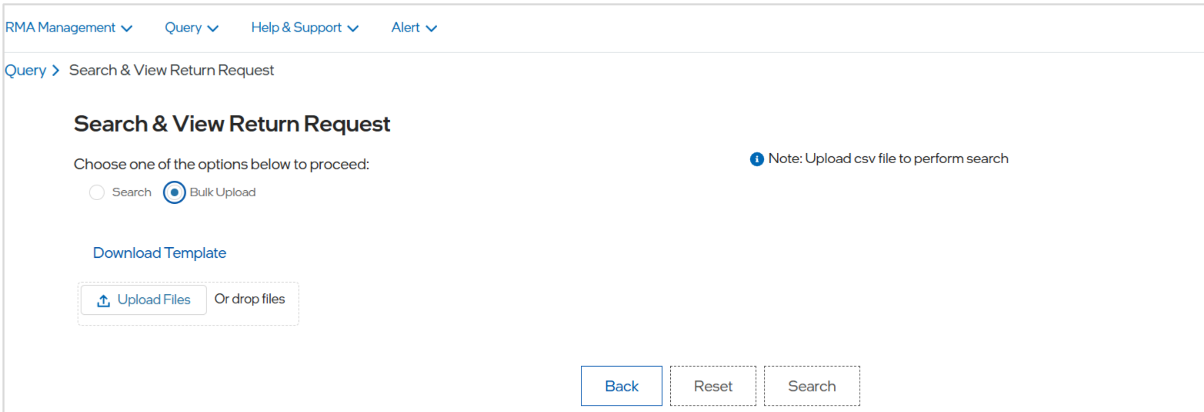
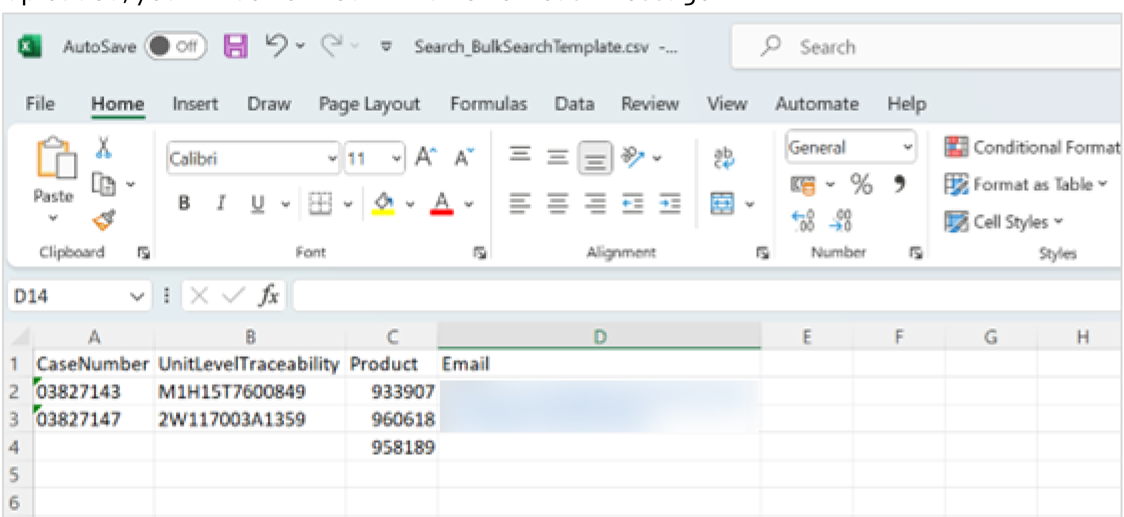
## Bulk Upload




*Bulk Upload interface*

1. You can download a CSV template by clicking on **Download Template** and enter the required data. Upload the file by either clicking the upload file button and selecting the file or by dragging and dropping the CSV file near the 'drop files' area. The search button will be disabled until a valid file is uploaded. If an empty file or a file with a format other than '.csv' is uploaded, you will be notified with an error toast message.




*Example of template*

2. When you click on 'Search,' all the search values are considered independently, fetched from the database, and displayed to you.

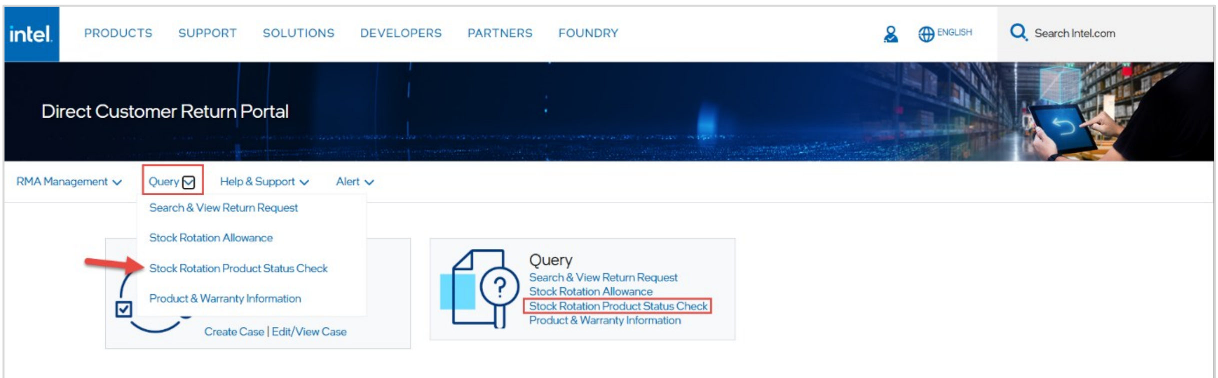
> **Note:** Users can only see cases that they have created.

3. If no data is found, you will be notified with an error message in the table. On clicking the 'Cancel' button, you will be navigated back to the Search Query page where they can fill in the details again.

4. You can download all the data in the table as a CSV file by clicking the 'Export To CSV' button located at the bottom of the table. The data will be formatted into CSV and downloaded automatically.

## Stock Rotation Product Status Check

1. From Homepage, select '**Query**' > '**Stock Rotation Product Status Check**' option to navigate to the corresponding page.

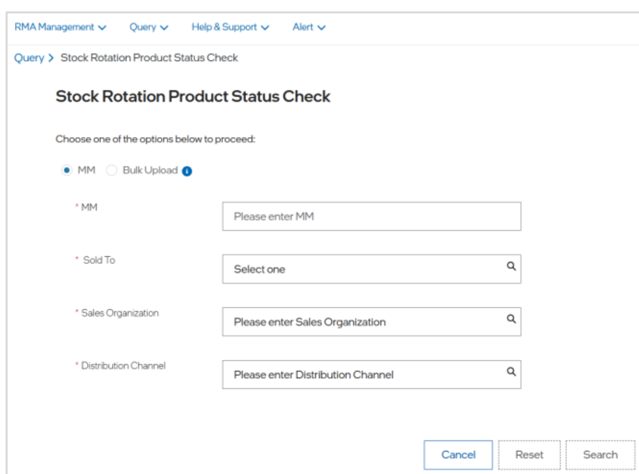



*Select Stock Rotation Product Status Check from Query*

2. Stock Rotation Product Status Check is divided into two sections: MM and Bulk Upload.

## MM Search

1. Search for products by providing the required fields. The search button will be disabled until all mandatory fields are entered.




*Search via MM*

a. **MM**: You can enter multiple comma-separated MMs.
b. **Sold To**: You can enter a single value.
c. **Sales Organization**: You can specify the required sales org to fetch products.

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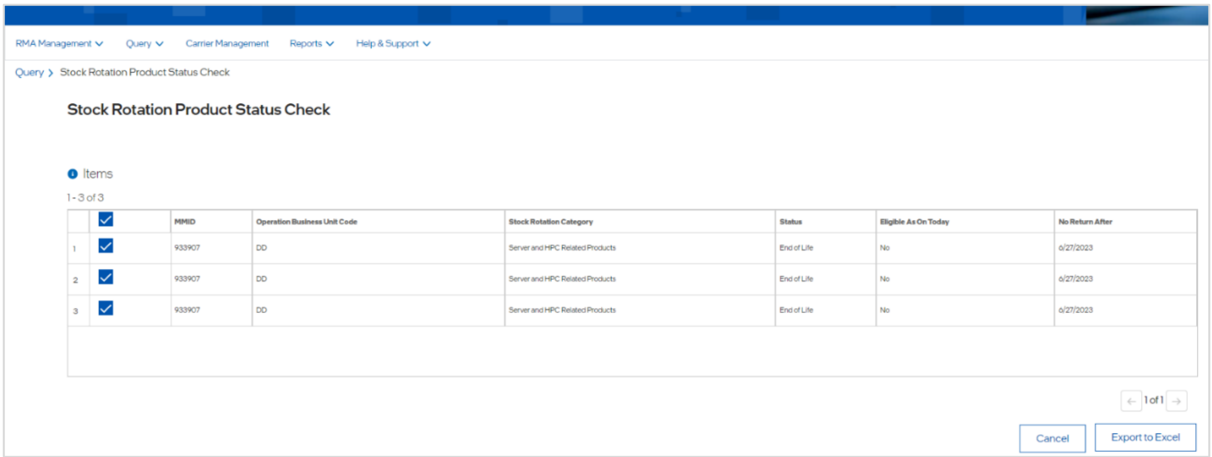
d. **Distribution Channel**: Users can specify the required distribution channel.

2. After entering the necessary field values and selecting the search button, the results based on the provided input combinations will be retrieved and presented in a table format.

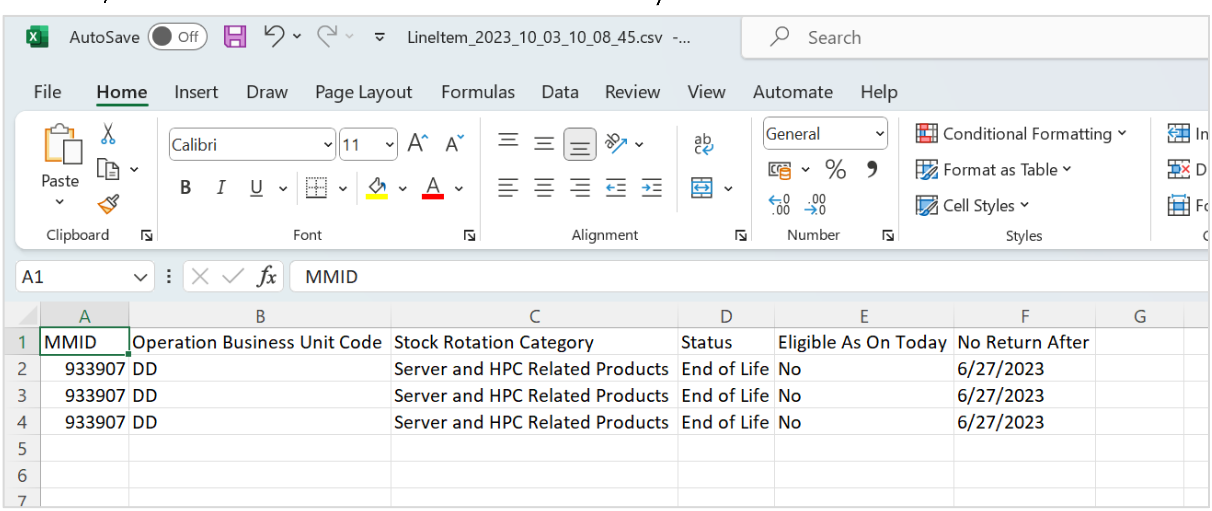
> **Note:** If any of the above validations are not met, you will be notified with an error message in the table.

3. When you click the '**Cancel**' button, you will return to the Stock Rotation Product Status page, where you can fill in the details again.
4. You have the option to download all the data present in the table as a CSV file. This can be done by clicking the '**Export to CSV**' button located at the bottom of the table.




*Export to Excel*

5. When you click 'Export to CSV', all the data displayed on the screen will be formatted into a CSV file, which will then be downloaded automatically.




*Downloaded Excel file*

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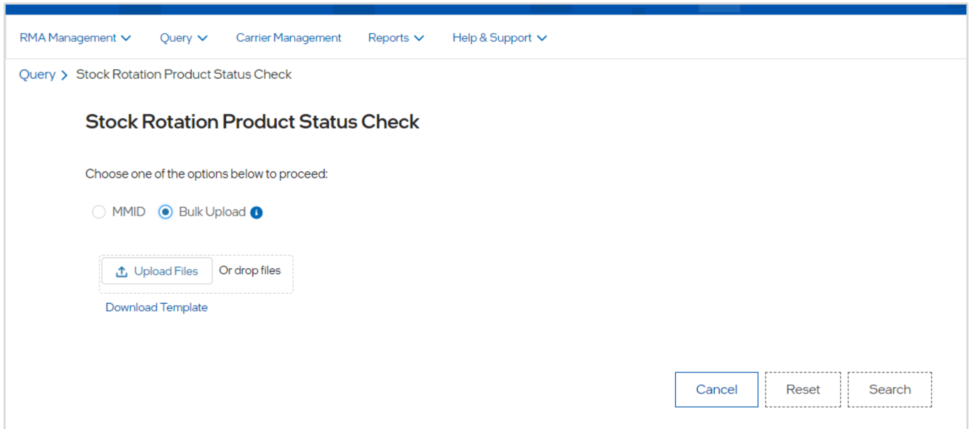
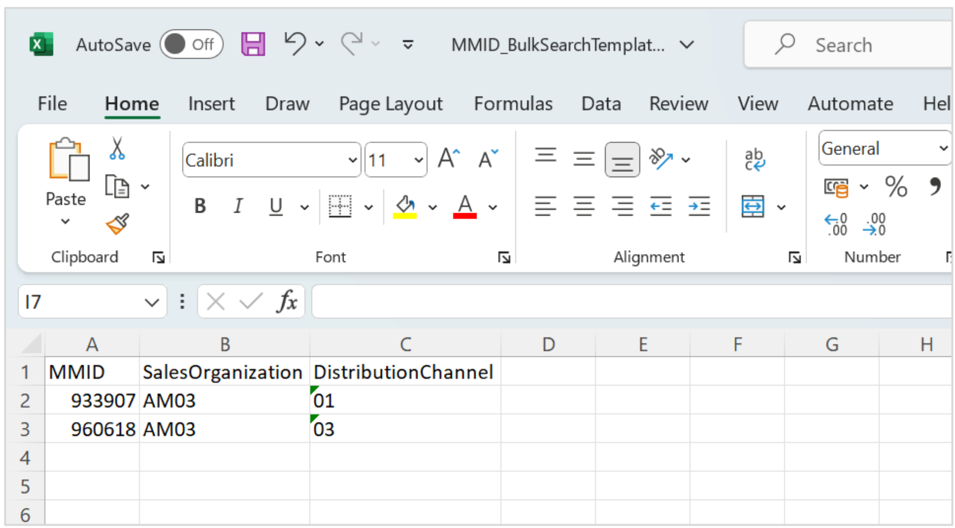
## Bulk Upload




*Search via Bulk Upload*

1. You can download a CSV template and enter the required data.




*Example of template*

2. Then you can upload the file by either clicking the upload file button and selecting the file or by dragging and dropping the CSV file near the 'drop files' area to upload it.
3. The search button will be disabled until you upload a valid file.
4. If an empty file or a file in a format other than '.csv' is uploaded, you will be notified with an error toast message.
5. If any required field is missing in the template, you will be notified with an error message upon clicking the search button. You can then correct the errors and re-upload the file.

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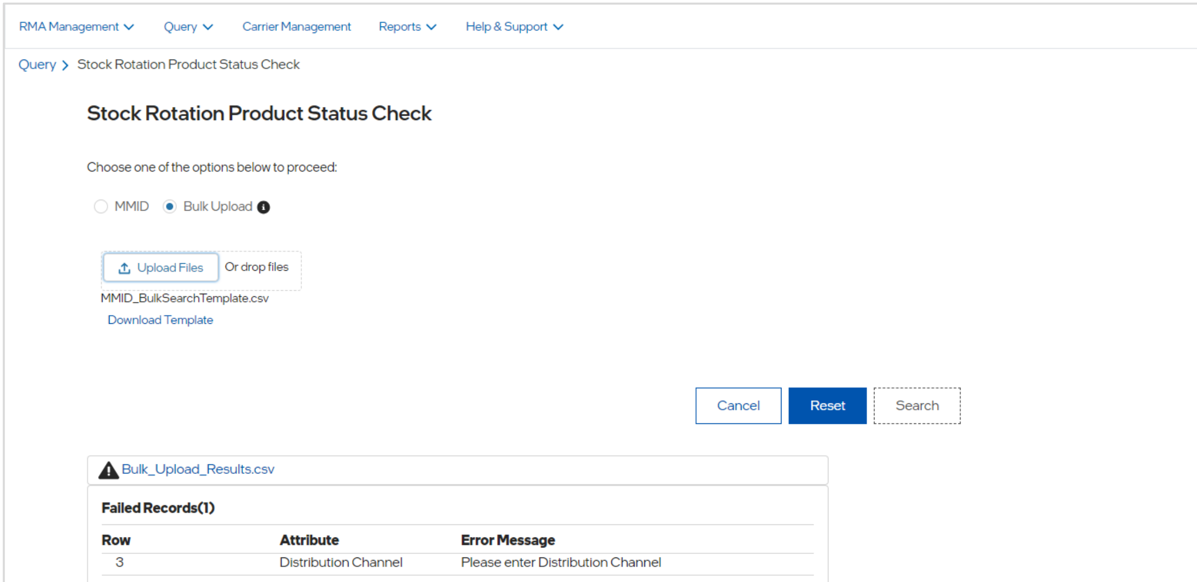
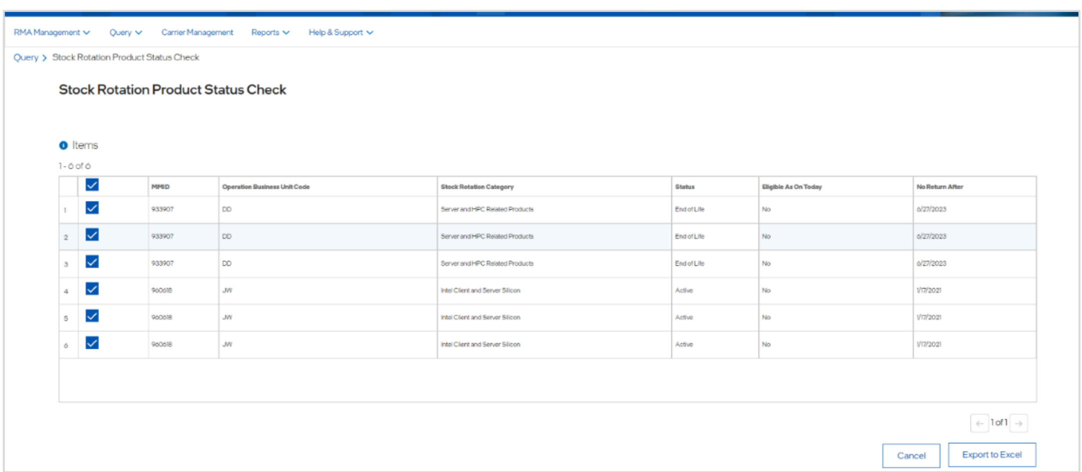



*Example of error notification one file is uploaded*

**Note:** If any of the above validations are not met, 'you will be notified with an error message in the table.




*Export to Excel*

6. You can download the data present in the table as a CSV file by clicking the 'Export to CSV' button.

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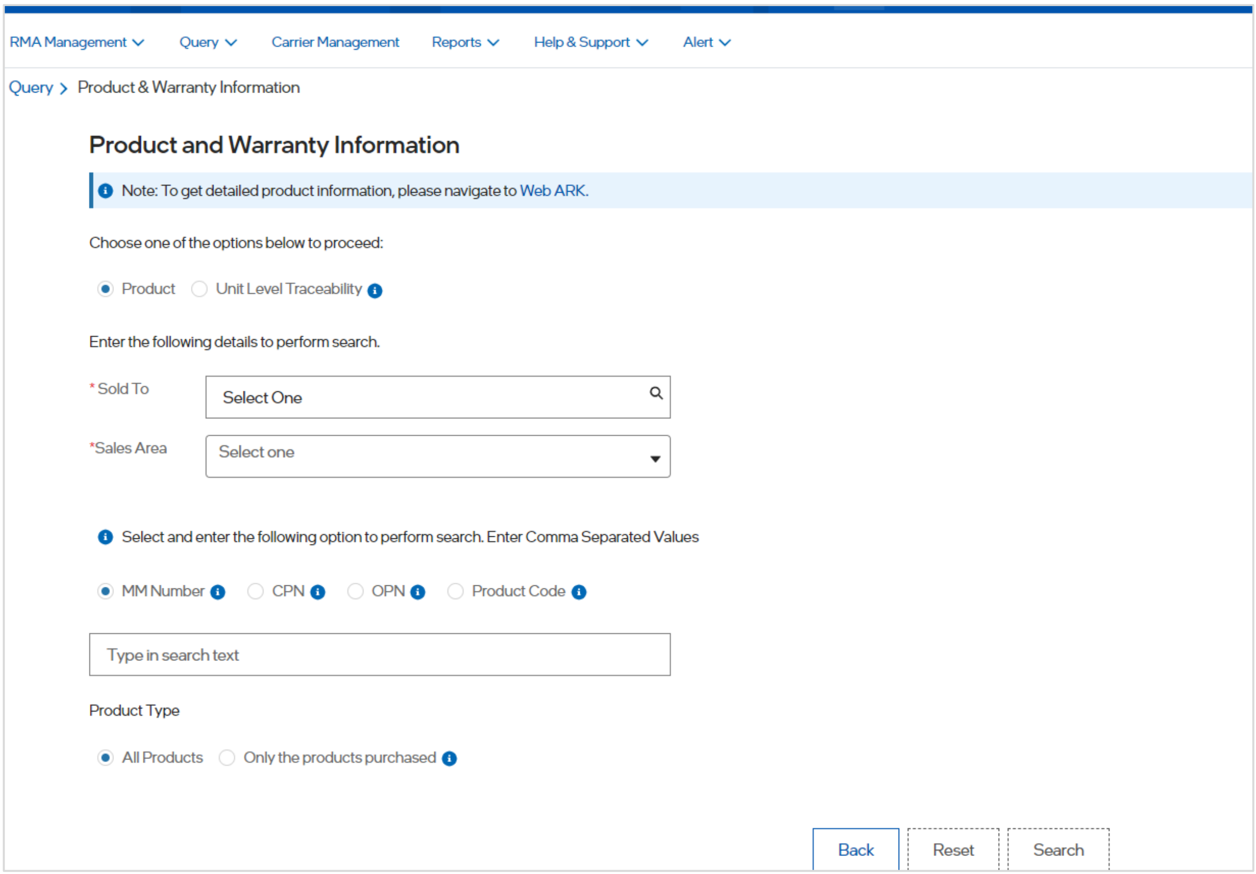
## Product and Warranty Information

### Product Search with MM and All Products

1. From Homepage, select 'Query' and select 'Product and Warranty Information'.




*Product and Warranty information page*

a. Select Product (selected by default).
b. Fill in the rest of the fields especially required ones marked in red asterisk (*)
    i. Sold To: All Sold To of your account are shown in the dropdown.
    ii. Sales Area: All Sales Area are shown in the dropdown.
c. Select either of following options to perform search;
    i. MM Number (selected by default)
    ii. CPN
    iii. OPN
    iv. Product Code
d. Enter Search value: Multiple Numbers can be entered, separated by commas. Search text can be searched using the wildcard *. If the result exceeds 10,000 records for a wildcard search, an error notification will be displayed, requesting you to refine your search criteria.
e. Select All Products: This search will give results of MM status without PO Number and billing date.
f. Clicking Reset will reset the selected values.

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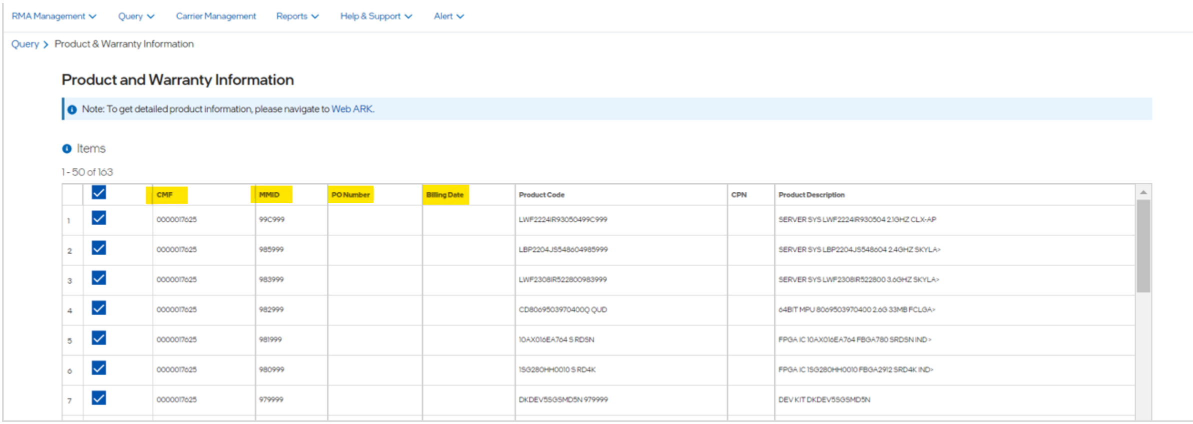
g. Click on Search and it will retrieve result and show on table.

h. The result can be exported to Excel for all the line items that are selected using the Export to Excel button.




| | | CMF | MMID | PO Number | Billing Date | Product Code | CPN | Product Description |
|---|---|---|---|---|---|---|---|---|
| 1 | | 0000017625 | 99C999 | | | LWF2224IR93050499C999 | | SERVER SYS LWF2224IR930504 2.1GHZ CLX-AP |
| 2 | | 0000017625 | 985999 | | | LBP2204JS548604985999 | | SERVER SYS LBP2204JS548604 2.4GHZ SKYLA> |
| 3 | | 0000017625 | 983999 | | | LWF2308IR522800983999 | | SERVER SYS LWF2308IR522800 3.6GHZ SKYLA> |
| 4 | | 0000017625 | 982999 | | | CD8069503970400Q QUD | | 64BIT MPU 8069503970400 2.6G 33MB FCLGA> |
| 5 | | 0000017625 | 981999 | | | 10AX016EA764 S RDSN | | FPGA IC 10AX016EA764 FBGA780 SRDSN IND > |
| 6 | | 0000017625 | 980999 | | | 1SG280HH0010 S RD4K | | FPGA IC 1SG280HH0010 FBGA2912 SRD4K IND> |
| 7 | | 0000017625 | 979999 | | | DKDEV5SGSMD5N 979999 | | DEV KIT DKDEV5SGSMD5N |

*Search results*

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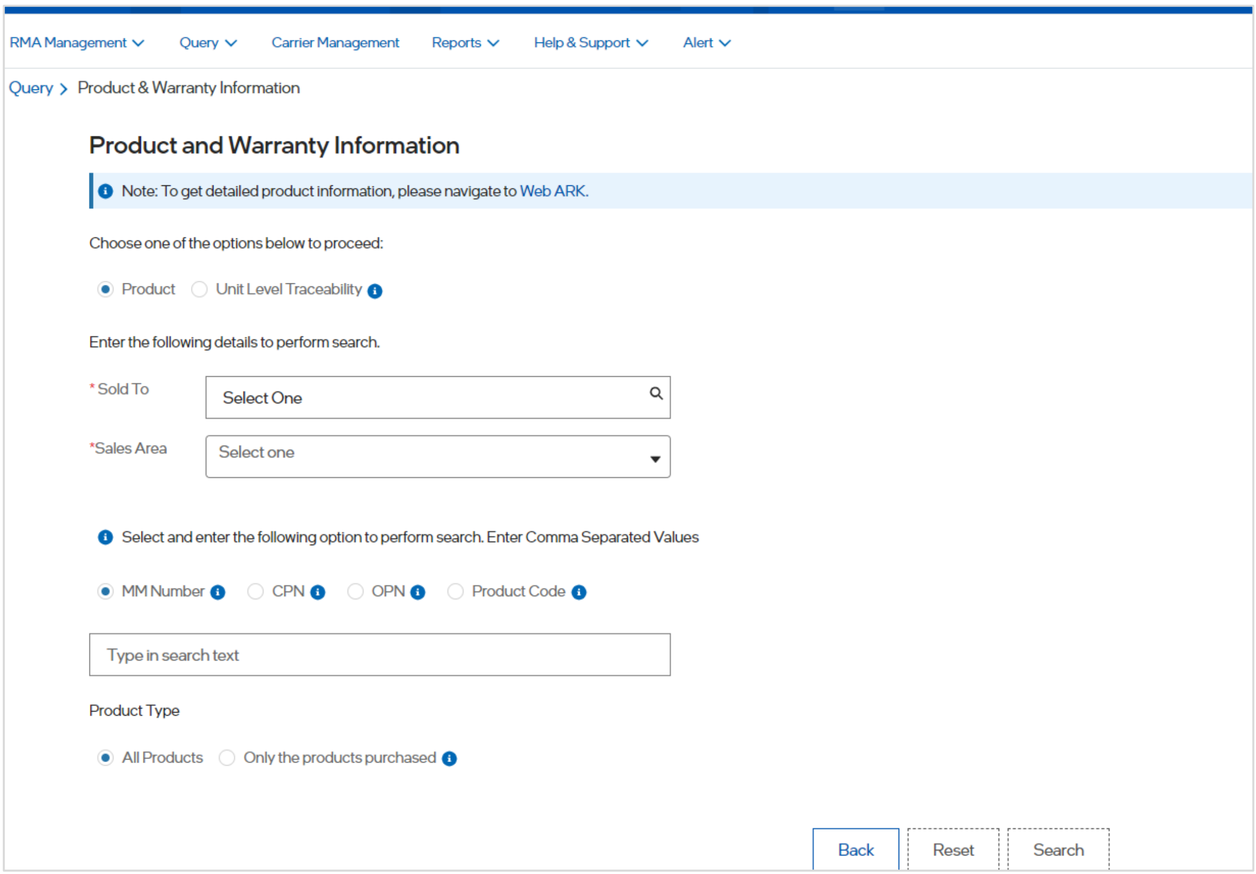
## Product Search with MM And Purchased Products

1. From Homepage, select '**Query'** and then select '**Product and Warranty Information**'.
2. The Search Button is disabled until the following are selected:
    a. Product
    b. Sold To
    c. Sales Area
    d. MM Number
    e. All Products




*Product and Warranty information page*

a. Select Product.
b. Fill in the following as below:-
    a. Sold To: All Sold To of user's account are shown in the dropdown.
    b. Sales Area: All Sales Area are shown in the dropdown.
    c. Select either of following options to perform search;
        i. MM Number
        ii. OPN
        iii. Product Code

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c. Enter Search value: Multiple Numbers can be entered, separated by commas. Search text can be searched using the wildcard *.
    i. If result is more than 10000 records for wild card search, error notification is shown to user asking to refine their search criteria.

d. Select All Products: This search selects only the products purchased and gives results of MM that are all part of the purchase history from the past 36 months (if start and end dates are not selected).

e. Select Start Date: Optional. If not given, the default value is today minus 36 months.

f. Select End Date: Optional. If not given, the default value is today.

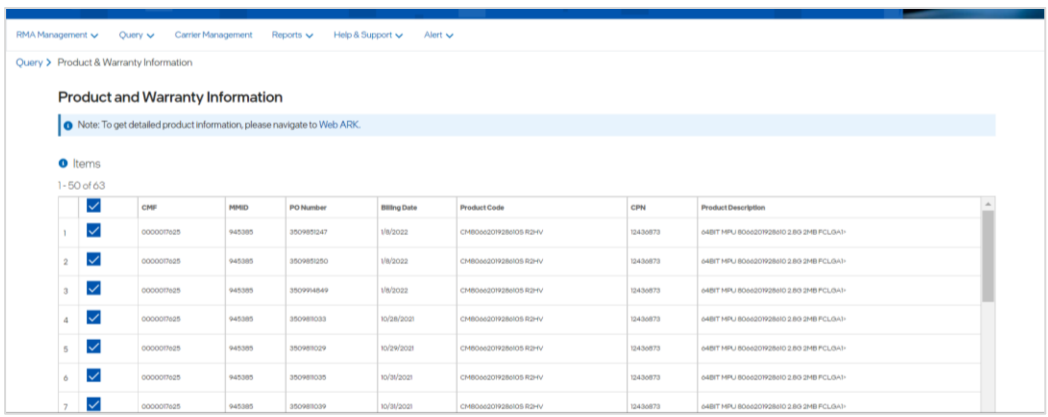
g. Clicking Cancel will take you back to the main screen.

h. Clicking Reset will reset the selected values.

i. Click on Search and it will retrieve result and show on table.

j. There can be duplicate MMs as they will be part of different PO Numbers.

k. The result can be exported to Excel for all the line items that are selected using the Export to Excel button.



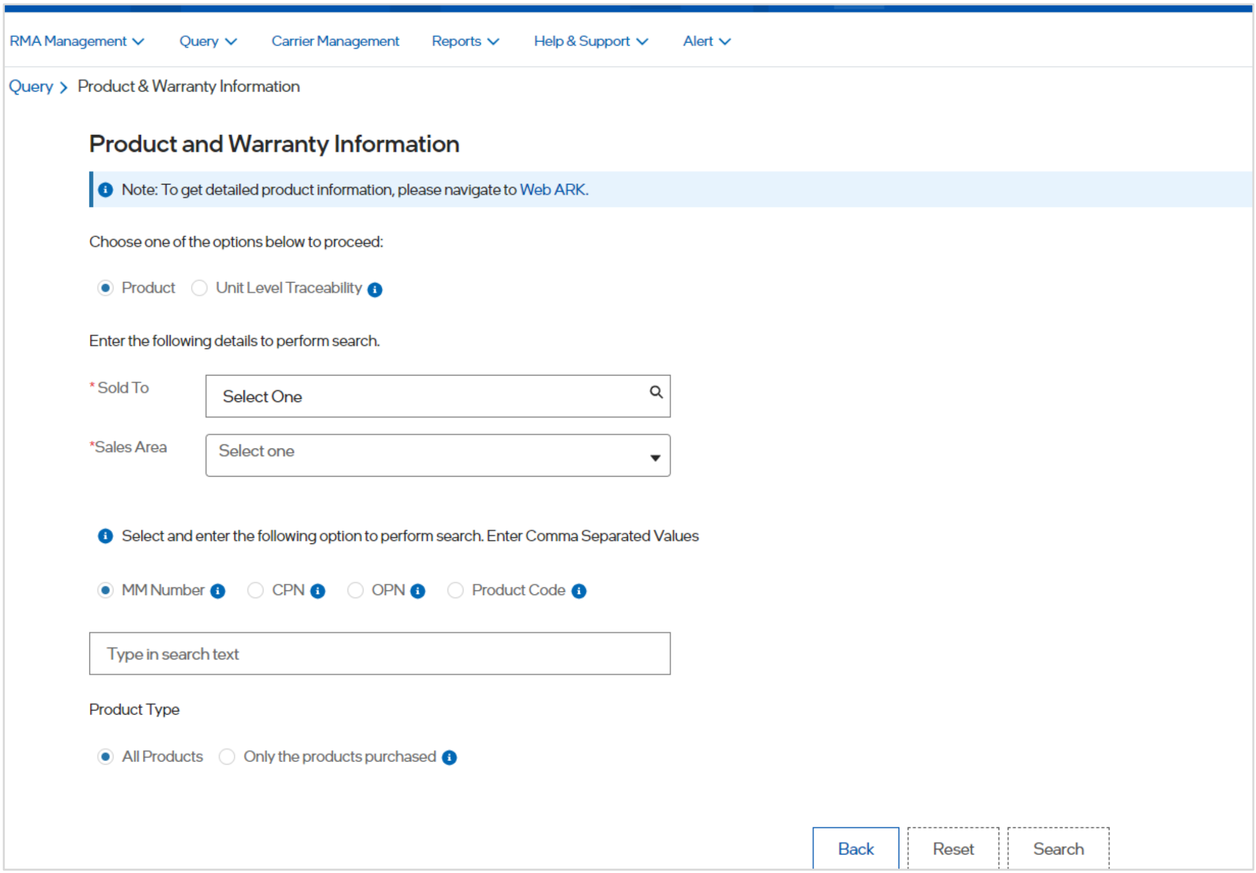

*Search results*

i. You can sort the PO Number and Billing Date as shown above.

ii. When the same PO exists in different CMFs, the PO is listed under the respective CMFs.

## Product Search with CPN and All Products

1. The Search Button is disabled until the following are selected:
   a. Product
   b. Sold To
   c. Sales Area
   d. MM Number
   e. All Products
2. Navigate to Query and Select Product and Warranty Information. Follow the details as shown;




*Product and Warranty information page.*

   a. Select Product.
   b. Sold To: All Sold To of user's account are shown in the dropdown.
   c. Sales Area: All Sales Area are shown in the dropdown.
   d. Select CPN and enter the CPN Numbers. Multiple Numbers can be entered, separated by commas.
   e. Select All Products: This search will give results of CPN status without PO Number and billing date.
   f. Clicking Cancel will take you back to the main screen.
   g. Clicking Reset will reset the selected values.
   h. Click on Search and it will retrieve result and show on table.
   i. The result can be exported to Excel for all the line items that are selected using the Export to Excel button.

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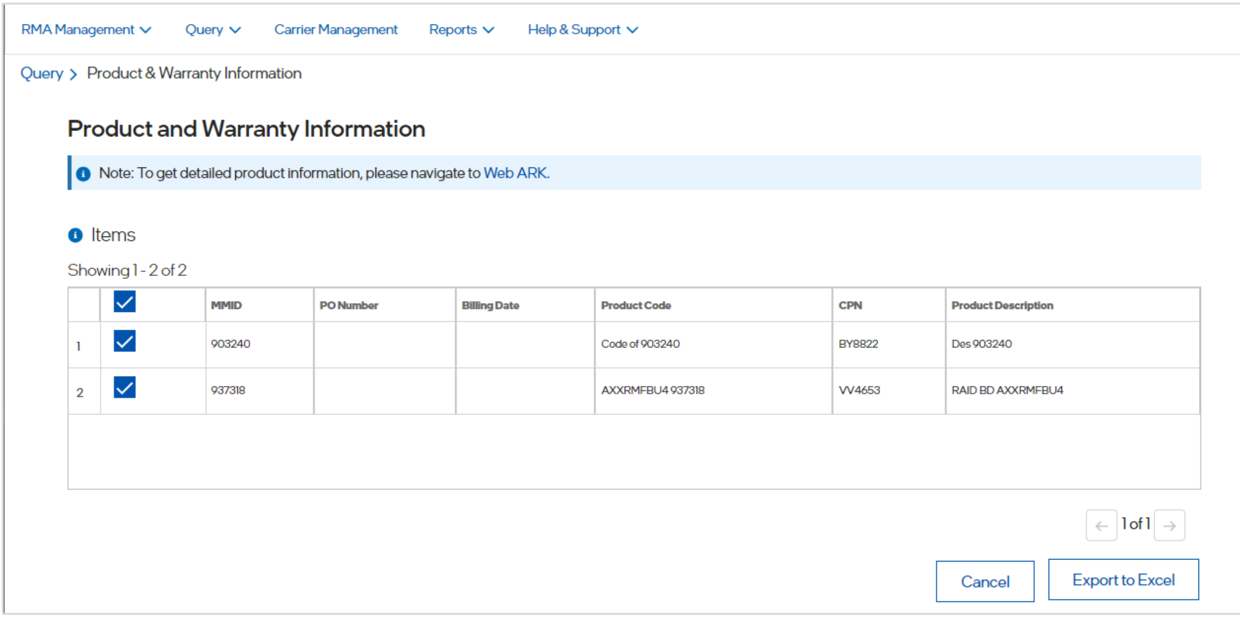
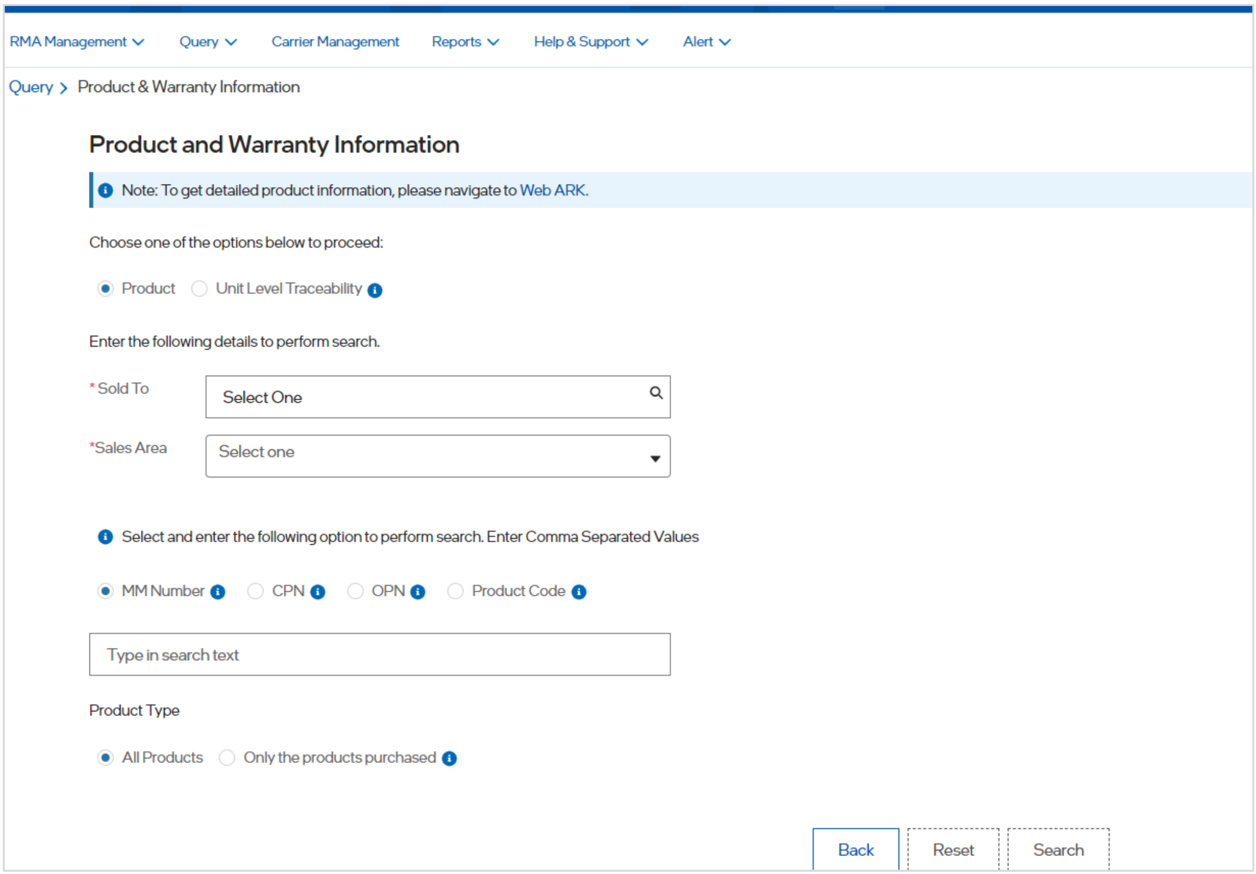



*Search results*

## Product Search with CPN and Purchased Products

1. The Search Button is disabled until the following are selected:
   a. Product
   b. Sold To
   c. Sales Area
   d. MM Number
   e. All Products
2. PO History Start and End Date cannot be less than 36 months from current date.
3. PO History Start and End Date cannot be more than 36 months apart.
4. Navigate to Query and Select Product and Warranty Information. Follow the details as shown;




*Product and Warranty information page*

   a. Select Product.
   b. Sold To: All Sold To of user's account are shown in the dropdown.
   c. Sales Area: All Sales Area are shown in the dropdown.
   d. Select MM Numbers and enter the MM Numbers. Multiple Numbers can be entered, separated by commas.
   e. Select Only the products purchased: This search will give results of CPN that are all part of the purchase history from the past 36 months (if start and end dates are not selected).
   f. Select Start Date: Optional. If not given, the default value is today minus 36 months.
   g. Select End Date: Optional. If not given, the default value is today.

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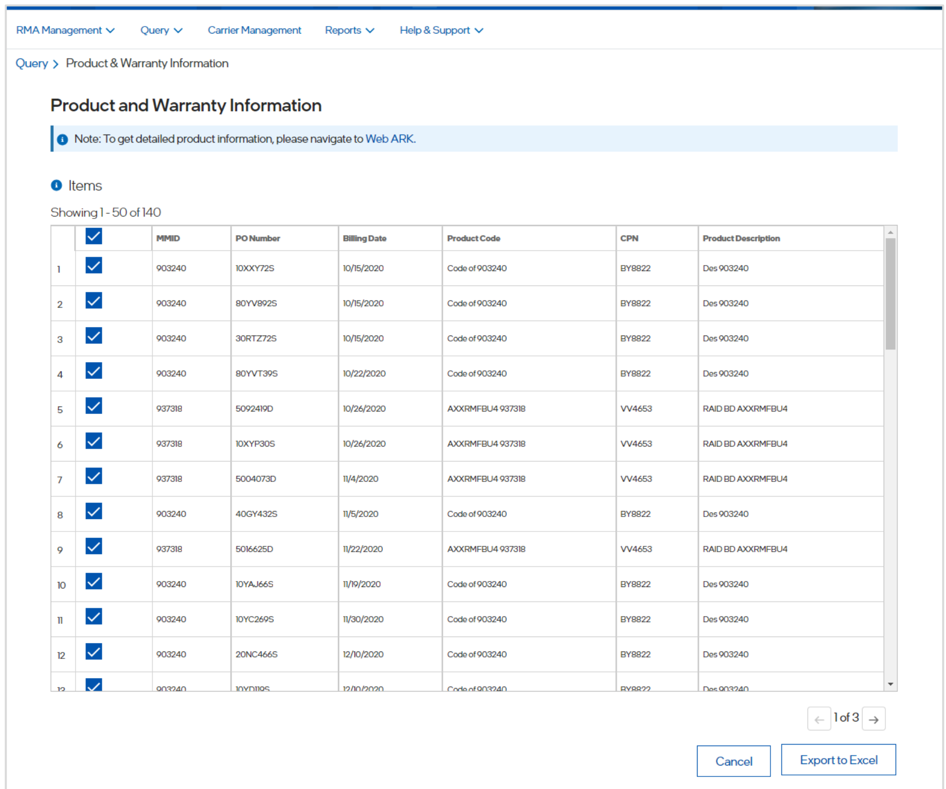
h. Clicking Cancel will take you back to the main screen.
i. Clicking Reset will reset the selected values.
j. Click on Search and it will retrieve result and show on table.
k. There can be duplicate MMs as they will be part of different PO Numbers.
l. The result can be exported to Excel for all the line items that are selected using the Export to Excel button.




*Search results*

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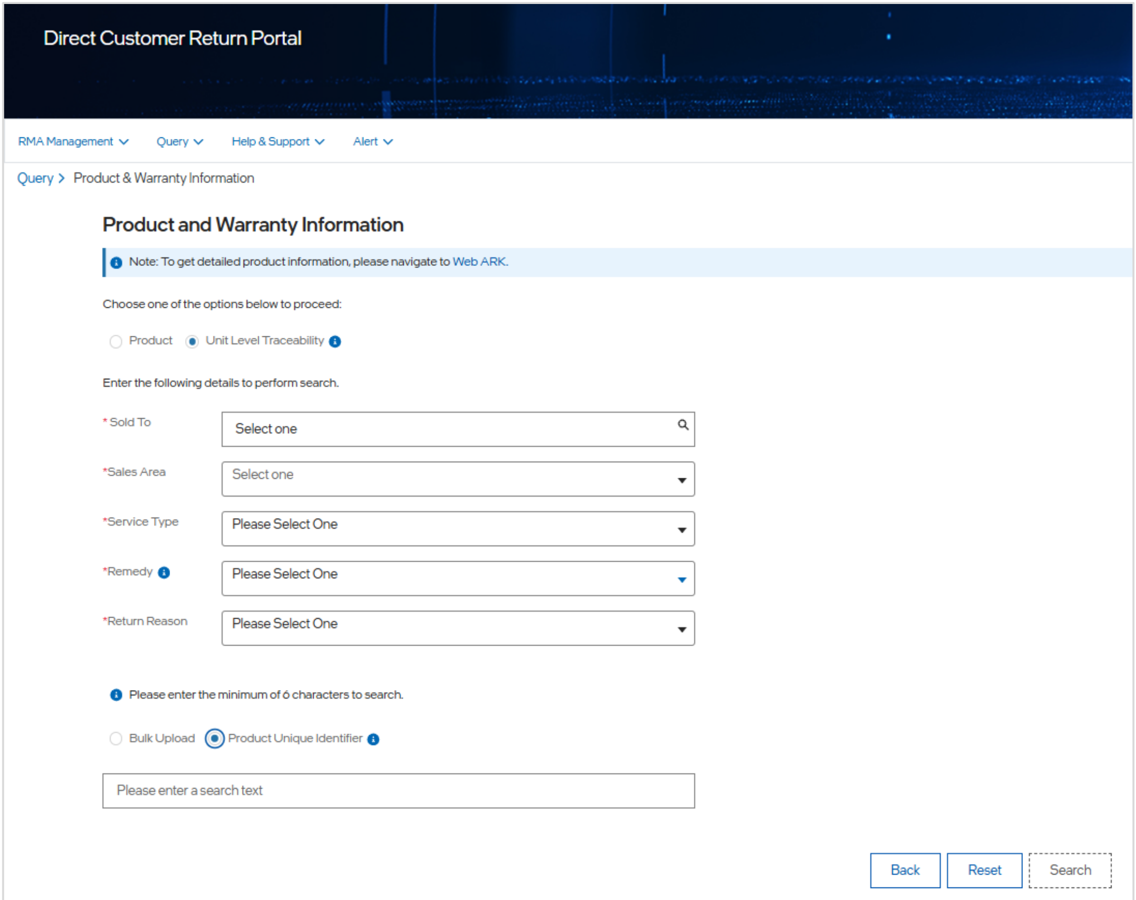
## Unit Level Traceability Search

1. Navigate to Query and Select Product and Warranty Information. Follow the details shown;




*Product and Warranty information page*

a. To Search, ULTs are entered.
b. Sold To: All users' account CMFs are available in the dropdown.
c. Sales Area is based on the selected Sold To, the available sales area is shown in the dropdown.
    i. If only one sales area is applicable, it will be auto selected.
d. Service Type: All service types are available in the dropdown.
e. Remedy is based on the selected service type; applicable remedies are shown in the dropdown.
f. Return Reason is based on the selected remedy, applicable return reasons are shown in the dropdown.
g. Select Product Unique Identifier: Up to 5 different numbers can be entered, separated by commas.
h. Clicking Cancel will take you back to the main screen.
i. Clicking Reset will reset the selected values.

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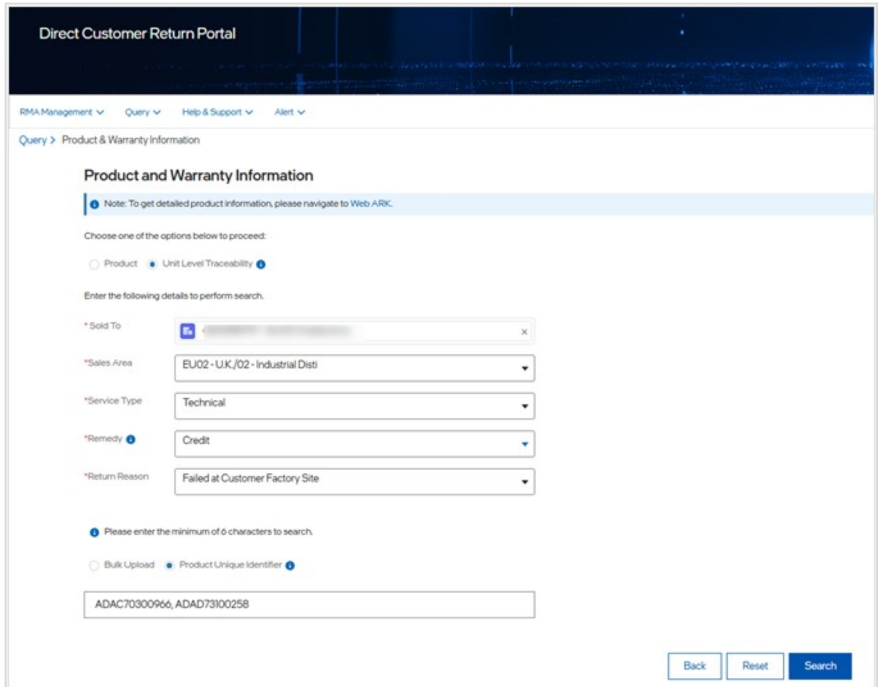
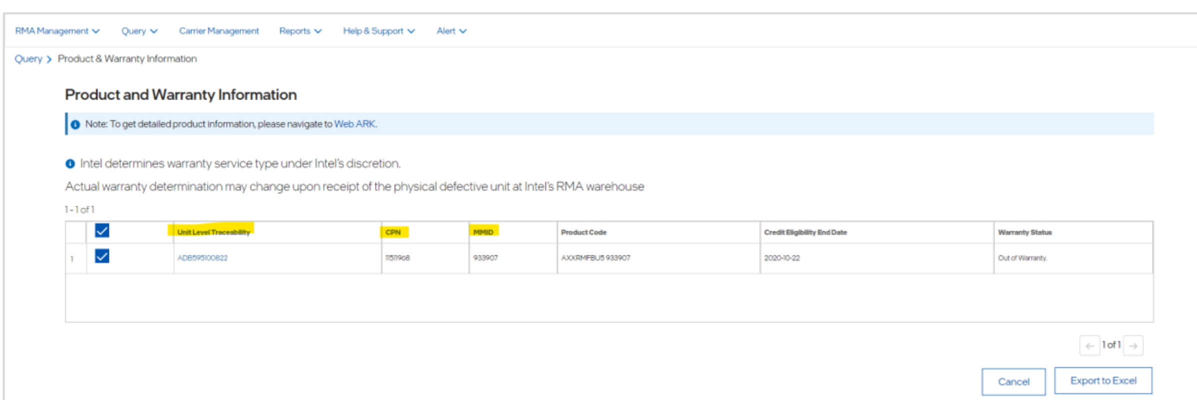



*Click Search to get the results*

2. Click on Search and it will retrieve result and show on table. The Search Button is disabled until the required fields marked with red asterisks (*) are filled in.
    a. MMs may appear more than once as they are associated with different PO numbers.
    b. The result can be exported to Excel for all the line items that are selected using the Export to Excel button.
    c. Clicking Cancel will take you back to the selection screen.
    d. Click unit-level traceability to see linked component hierarchy items in a popup.
    e. The item will show expired in case:
        i. The warranty end date is greater than today.
    f. You can see the ULT, CPN, MM, etc., as shown.




*Search results*

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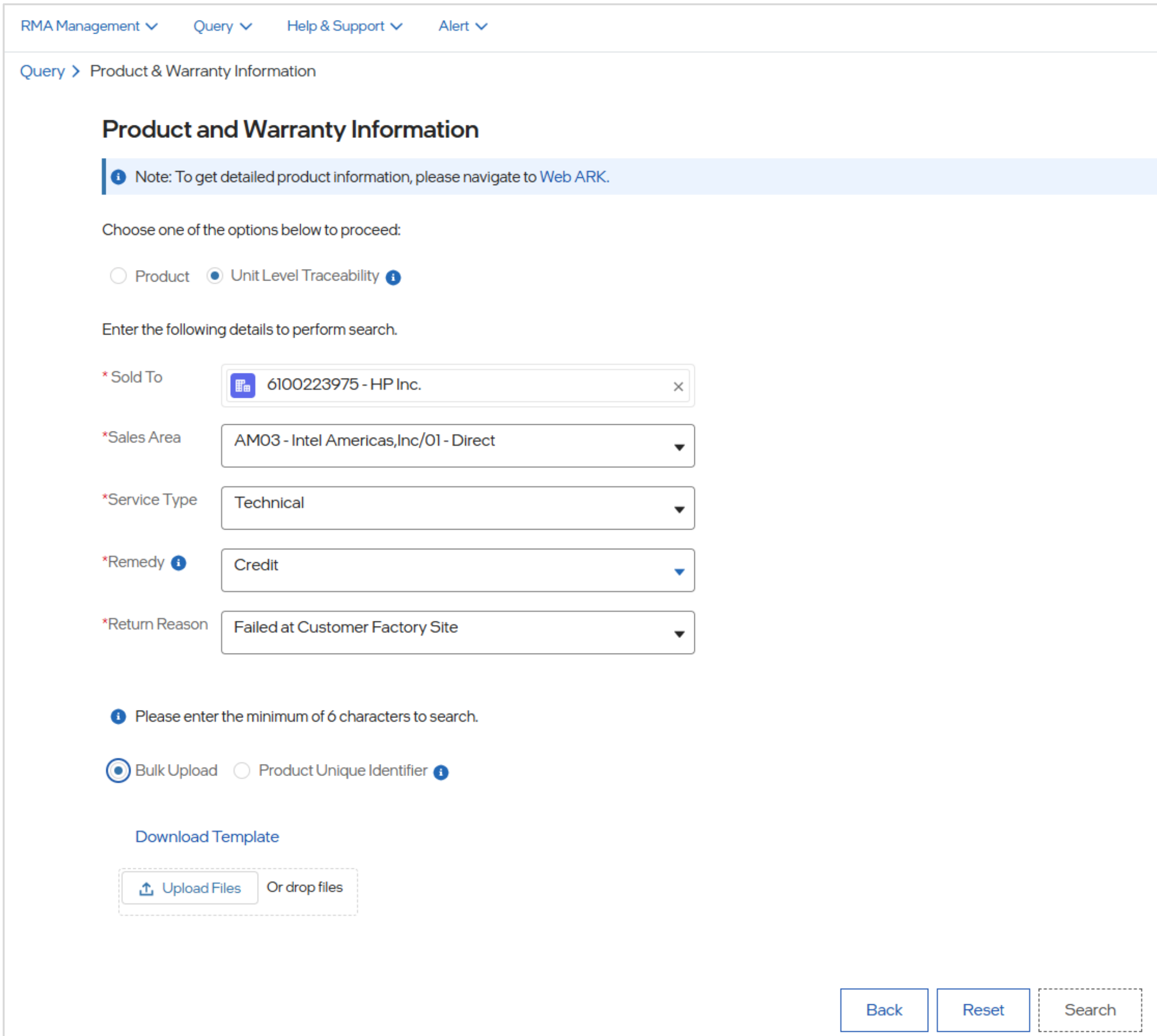
## Bulk Unit Level Traceability Search

1. Navigate to Query and Select Product and Warranty Information.




*Product and Warranty information page*

2. The Search Button is disabled until the required fields marked with red asterisks (*) are filled in.
    a. Csv file should be uploaded.
    b. Sold To: All users' account CMFs are available in the dropdown.
    c. Sales Area is based on the selected Sold To, the available sales area is shown in the dropdown.
        i. If only one sales area is applicable, it will be auto selected.
    d. Service Type: All service types are available in the dropdown.
    e. Remedy is based on the selected service type; applicable remedies are shown in the dropdown.

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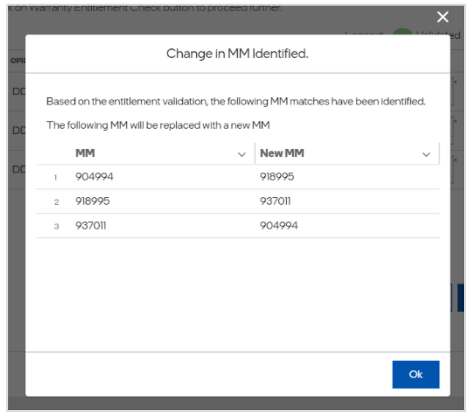
f. Return Reason is based on the selected remedy, applicable return reasons are shown in the dropdown.

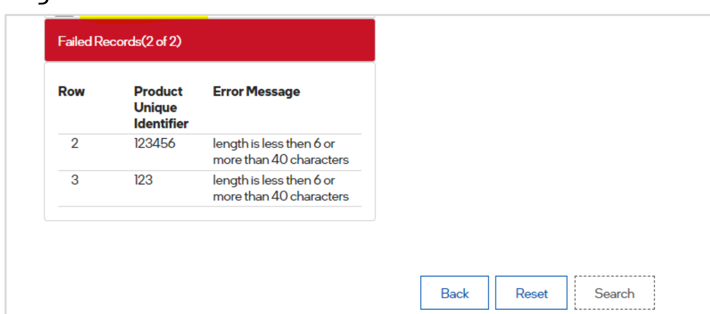
3. Select Bulk Upload: The sample template can be downloaded by clicking Download Template. Template header contains Product Unique Identifier. Enter the value before reuploading to the portal.

    - When data is uploaded with different MMs, CPNs, or OPNs, a pop-up will show the MM number being replaced.



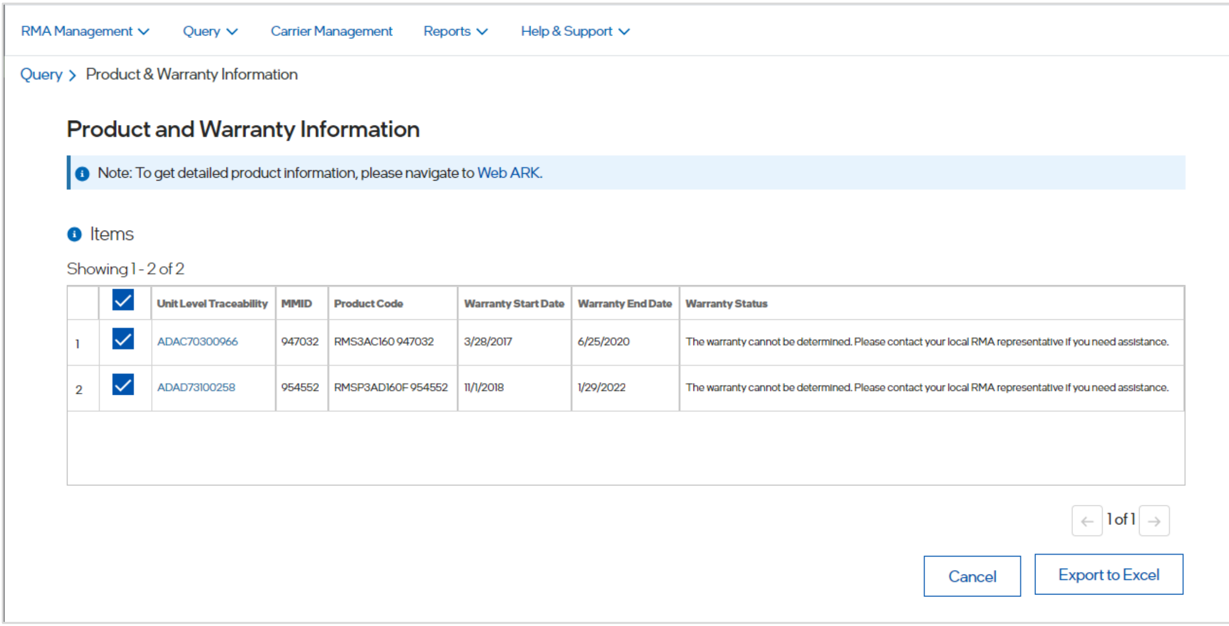

*Change in MM identified and shown in pop-up*

a. Errors in ULTs are displayed in a table with options to download and reupload the template. Errors occur when:
    i. Clicking **Cancel** will take you back to the main screen.
    ii. Clicking **Reset** will reset the selected values.




*Errors in ULT*

b. Click on Search and it will retrieve result and show on table.
c. Product Unique Identifier that are not found are displayed in the table with the status as not found.
d. The result can be exported to Excel for all the line items that are selected using the Export to Excel button.
e. Clicking Cancel will take you back to the selection screen.
f. Unit-level traceability can be clicked to check if any component hierarchy items are linked. If yes, they are displayed as a popup.
g. The item will show expired in case:
    i. The warranty end date is greater than today.




*Click Search to get the results*

# Acronym

| | |
|---|---|
| QAN | Quality Action Notice |
| MRB | Material Review Board |
| PRT | Problem Response Team |
| FAC | Failure Analysis for Credit |
| NPR | No Product Returned |
| CRF | Customer Routed Freight |
| CPN | Customer Part Number |
| IMF | Intel Managed Freight |
| MM | Material Master Identification |
| OPN | Ordering Part Number |
| RTC | Return to Customer |
| RMA | Returns Material Authorization |
| ULT | Unit Level Traceability |
| BAG | Business Account Group |
| PO | Purchase Order |
| PCN | Product Change Notification |
| PDN | Product Discontinuance Notification |
| CSV | Comma-separated values |
| SRA | Stock Rotation Allowance |
| NCNR | Non-Cancellable and Non-Returnable |
| COD | Certificate of Destruction |

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