

Keyholder/Lead INVision v3.0 Guide

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RTS/RMA Verbiage Update

1. **“New”**: RTS term will be updated to be easier to learn and have a standard term of usage.
 - Defining “New” Items:
 - Never been delivered to a Sleep Number customer’s home
 - Not used by a Sleep Number customer
 - **Items could be Open or Damaged product that hasn't been delivered (New/Opened)
 - Possible Box Conditions for “New” Items
 - Unopened – Eligible for being held
 - Opened – Ship back to ADC
 - Damaged – Ship back to ADC
2. **“Used”**: RMA term will be updated to be easier to learn and have a standard term of usage.
 - Defining “Used” Items:
 - Were previously installed and used by a Sleep Number customer in their home
 - Possible Box Conditions for “Used” Items
 - Used/Previously Delivered – Not Eligible for being held for recovery

LPN Guide

1. What is LPN?
 - LPN stands “License Plate Number” it refers to a “Unique Identification Number” that’s assigned to an item/product at the box-level. LPN simplifies and streamlines the process of identifying products to be picked, loaded, and returned. it is created as part of the customer label at the ADC.
2. What does LPN look like?
 - LPN comprised of 13 digits
3. Where can you find LPN on the product?
 - LPN is located on the label located on the product
4. Where is LPN located in INVision
 - LPN will be located wherever identification of the box is needed



4.

Returns 22

Please verify the condition of each box:

95007218618 2 / 2 ^

CARTER EKSTROM BOTHMAN

Next Delivery: **09/23/2023**

RTID: **R12345678**

SKU: **123456**

LPN: **CA00000123456**

ASSY, FIRMNESS CONTROL, BASE, 360 ⓘ

Report Opened

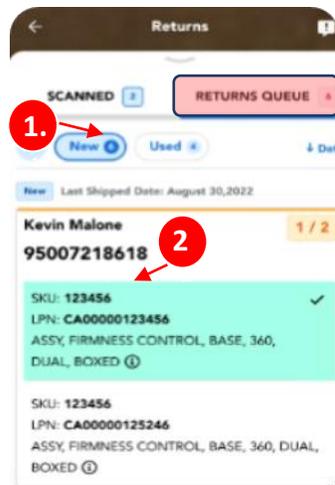
Returns Tile

1. Scanning New Items

1. Select the "Returns" Tile
2. Once in the returns tile you will be taken to the scan screen and be asked to scan three items:
 1. LPN
 2. RTID
 3. SKU
3. The manual entry button to be used for any NEW/RTS items where the barcodes are damaged or unable to be scanned
4. The "Previously Delivered" button is utilized for entering Used/RMA items
5. After scanning all items press and swipe scanning tab upwards on the screen
6. Once you swipe the screen upwards you will see "Scanned" and "Returns Queue" tabs

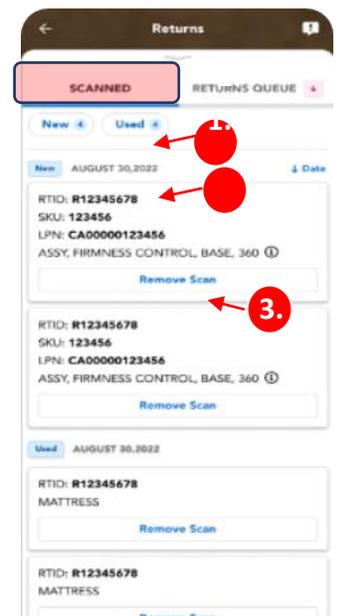
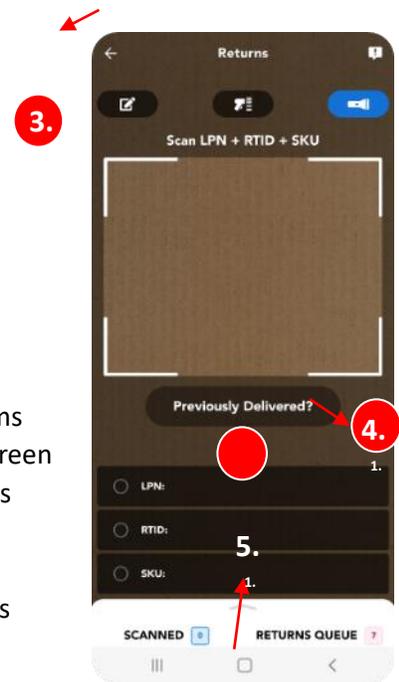
- **Under Returns Queue tab:**

1. Green and Yellow colors used to identify if the entire order is scanned or not
2. New & Used filters to help sort scans
3. Detailed information on each order/item in the returns queue including LPN



- **Under Scanned tab:**

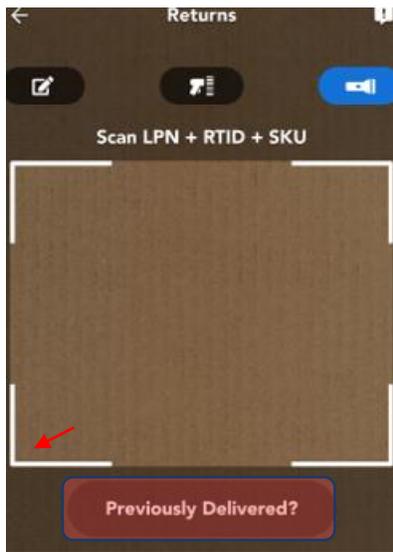
1. New & Used filters to help sort scans
2. Date is displaying the chronological time of the scan entry
3. User friendly buttons for removing an unwanted scan
 - When removing the scan, it will remove as a scanned item in the returns queue
4. Click Verify after scanning and entering all returns



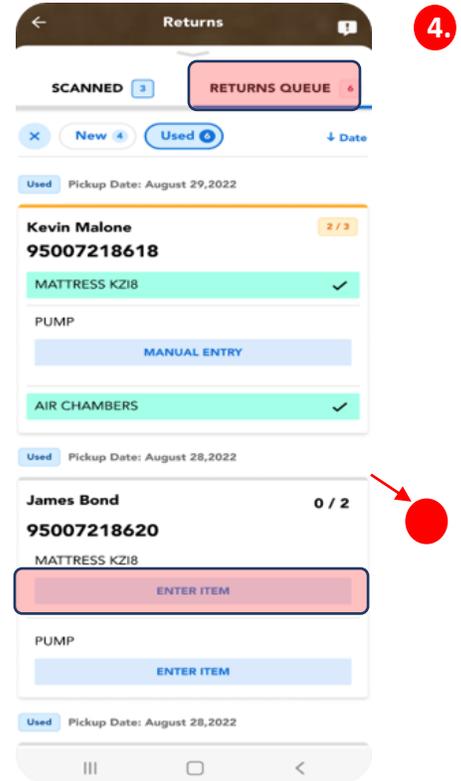
2. Processing Used Items & Verifying Box Condition

1. To process “Used/RMA” Orders/Items scan the labels on the box

1. Select “Previously Delivered” on the screen
2. You can also enter Used/RMA items by selecting the “ENTER ITEM” button next to the item on the Returns Queue, this will make the Previously Delivered form pre-filled with the details



1.



2. If you need to process “Used” orders/items manually go to the scan screen and select the notepad with the pencil in the upper left corner.

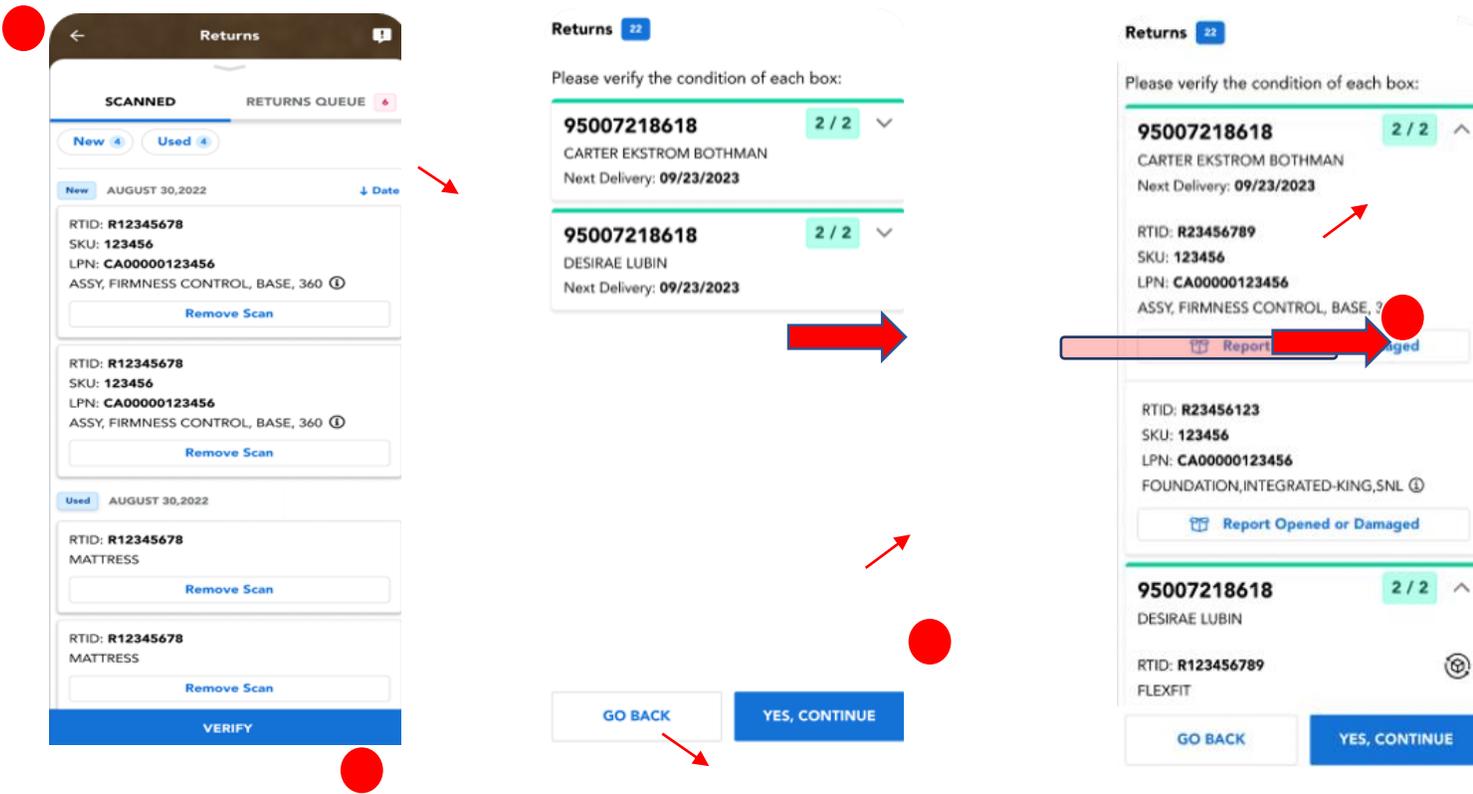
1. Enter the RTID and the Service Order Number of the Used item coming from the Sleep Number customer’s home. Note: Return Exceptions process will come later.
2. Enter the Order Number
3. Enter the Category of the item
4. Once the Used item has been entered it will show as scanned in the Returns Queue and the “ENTER ITEM” button will disappear

A screenshot of the 'Previously Delivered' form. At the top, it says 'Previously Delivered' with a notepad icon. Below that, it says 'Enter details below if this item was used by a customer.' There are three input fields:

- RTID: R12457898 (highlighted with a red box and a red arrow labeled '1.')
- Order Number: 950123456789 (highlighted with a red box and a red arrow labeled '2.')
- Category: Select a category (highlighted with a red box and a red arrow labeled '3.')

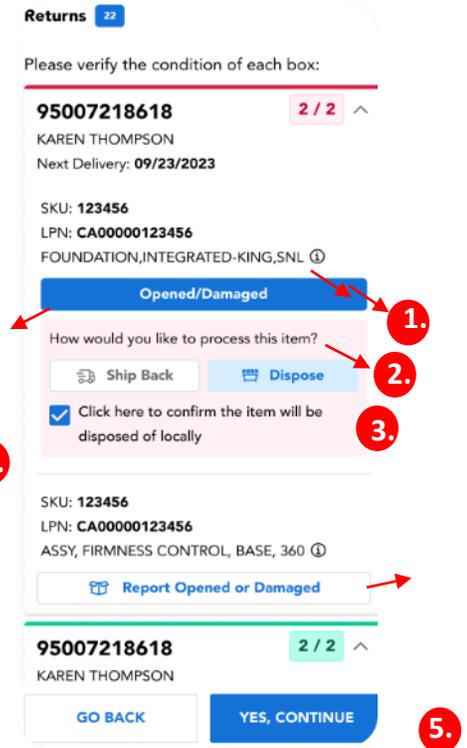
 A red arrow points to the notepad icon at the top left.

3. After selecting “Verify” on the Scanned Tab you will be directed to the Box verification step to tell Sleep Number what the condition of the items are in
 1. Each order that was scanned will display on this list
 - Click the expand arrow to select the box conditions
 2. Select “Verify” after confirming all orders are accurate
 3. You will receive summary screen for the items you have to “Verify”, select “Yes, Continue”
 4. For each New/RTS item that was scanned you have the ability to determine if that box should be considered Opened/Damaged
 - Note this will default the order to be shipped back to the ADC
 - For Used/RMA items, you do not have to report the item as opened/damaged – the box condition will already be Open



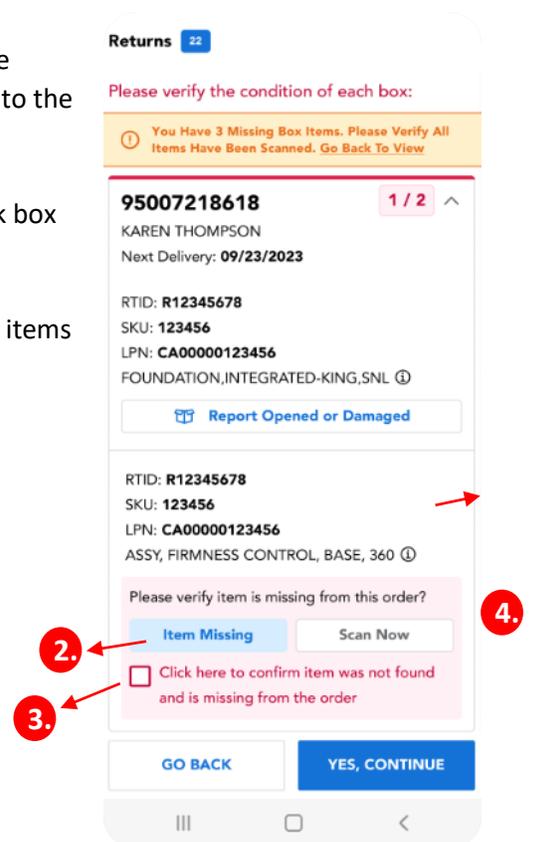
3. In Market Integrated Base and Frame Disposal

1. For Integrated Bases and Frames that are marked as Opened/Damaged, you will have the ability to Dispose in Market
2. To dispose of an Opened/Damaged Integrated Base and or Frame you will need to mark so during box condition verification process.
 1. Select "Opened/Damaged"
 2. You will receive a prompt asking "How would you like to process this item"
 3. Select "Dispose" - to report that the item will be disposed in market and not sent back to the ADC
 4. Select prompt that says "Click here to confirm the item will be disposed of locally"
 5. After box has been checked select "Yes, Continue"
 - Note: That item will not appear on the QR code to be accepted, you can dispose of the item once the returns process is completed



4. Missed Scanned Items

1. While processing returns, the entire order is being scanned if an item you will need to confirm the items were not scanned.
 - Note: If the entire order is not scanned, the order will be defaulted to Ship to ADC due to the order not systematically being scanned in.
2. If the box is truly missing, select "Item Missing"
3. If "Item Missing" is selected, you will need to check box to "confirm item was not found"
4. If box is available, select "Scan Now" and scan box
5. Select "Yes, Continue" and the orders with missing items will be given the status "Ship to ADC"



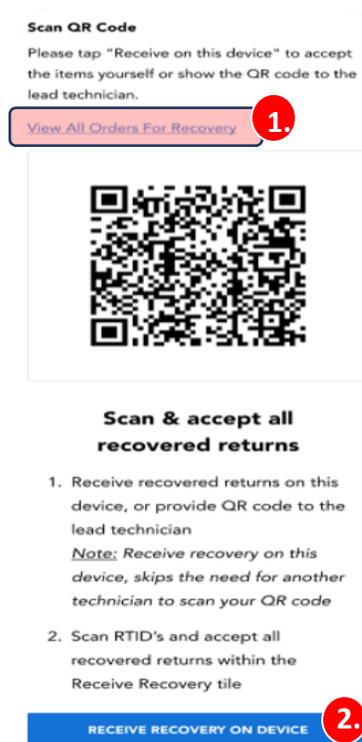
5. Summary and Status Changing

1. Once all box condition options have been selected and have continued to the next step, you will receive a summary of each of the orders scanned
2. There are 3 different statuses
 - Ship to ADC – orders going back to the ADC
 - Held for Recovery – orders being held in the market for delivery
 - Dispose – items being disposed of locally
3. Once selected to change the status, click the check box to confirm the status change and click the “UPDATE ORDER” to officially change the status.
 - Once updated, the order will display in the new status category with a star and a blue color on the order
4. You can continue to make updates to order statuses or select “Yes, Continue”



6. Processing Recovery

1. *Key Holder* in ADC, Shuttle, and Spoke Market types
 1. To see all the orders that are being processed in the QR code select “View All Orders For Recovery”
 2. Have another technician scan the QR code from your device or click “Receive Recovery on Device”



2. Sleep Number team in ADC, Shuttle, and Spoke Market Types
 1. To see all the orders that are being processed in the QR code select “View All Orders For Recovery”
 2. Have another technician scan the QR code from your device and click “Complete”

Scan QR Code
Please show the QR code to the Keyholder to scan and accept recovered returns.

[View All Orders For Recovery](#) **1.**



Keyholder to scan & accept recovered returns

1. Show QR code for Keyholder scan
2. Keyholder will scan RTID's and accept all item(s) for recovery
3. If the Keyholder does not receive an item they will reject it on their device and inform you

COMPLETE **2.**

3. Sleep Number team in DDC Market Type
 1. To see all the orders that are being processed in the QR code select “View All Returned Orders”
 2. Have the Warehouse team scan the QR code from your device or click “Receive Recovery on Device”

Scan QR Code
Please show the QR code to the Warehouse team to scan and accept returns.

[View All Returned Orders](#) **1.**

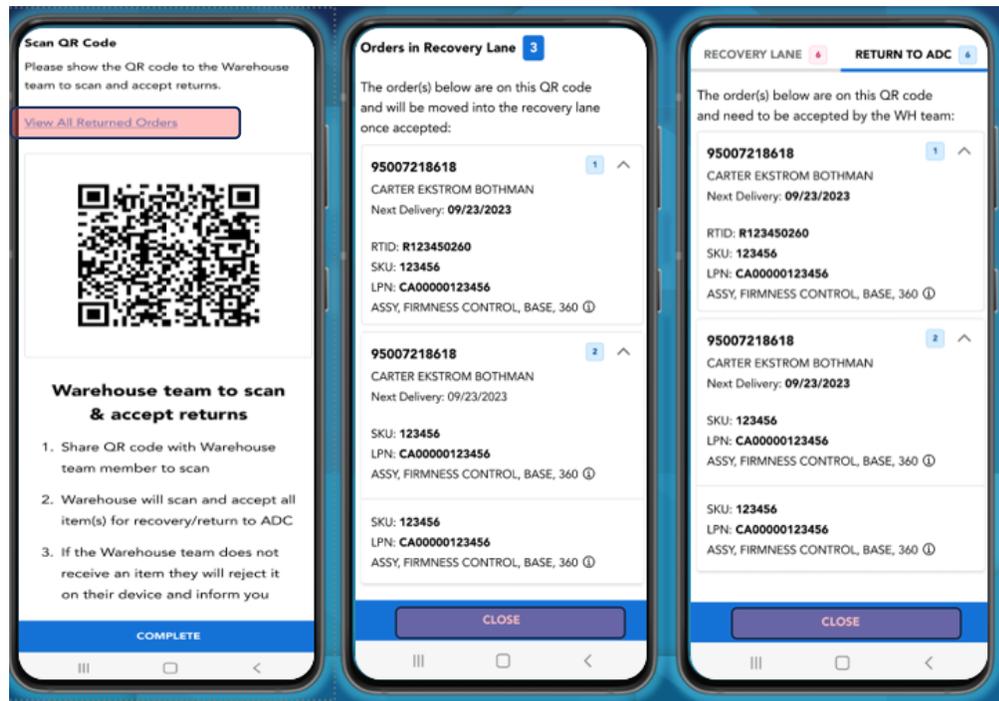


Warehouse team to scan & accept returns

1. Share QR code with Warehouse team member to scan
2. Warehouse will scan and accept all item(s) for recovery/return to ADC
3. If the Warehouse team does not receive an item they will reject it on their device and inform you

COMPLETE **2.**

1. When selecting to view the orders/recovery items on the QR code this page will display once you select “Close” you will be brought back to the QR code page



7. Processing Ship to ADC

1. *ADC*
 1. Scan the Dock Team ID to process items going back to the ADC
2. *Shuttle Market Type*
 1. Scan /manually enter the Shuttle Drive ID to process items going back to the ADC
3. *Spoke (LTL Return Type)*
 1. Scan the Pro # for the items going back to the ADC
4. *Spoke (FTL Return Type, OGG, & HNL)*
 1. No Pro # needs to be scanned within the Returns process, you will now process your returns going to ADC within the new “Return to ADC” tile when the returns trailer has arrived, and you have a Pro # to enter
5. *DDC*
 1. Have the Warehouse team scan the QR code for all recovery items and items going back to the ADC

8. Return Exceptions

1. Select Inventory Type Return Exception Install Only products
 - Install Only: Items that were shipped to Sleep Number customer's houses that were taken back to the market
 - Store Visits: Products that were picked up from store visits
 - Overstock: items that are overstock in the market that need to be shipped back to the ADC (Not associated to a Sleep Number customer)
2. Each item requires an RTID associated to it
 - Enter the category of the item
 - Optional: if there is a sales order associated to the item, enter the order number
 - "Submit" will be enabled once steps 1-3 have been completed
3. After selecting "Submit" a message will display to enter the scanned RTID as a returns exception
 - The item will be given the status of shipping back to the ADC, will not be eligible for holding in the market for recovery
 - Select "Yes, Continue"
4. After submitting, a success message will display at the bottom
 - Continue to scan and process as many items for exceptions as needed
5. The returns verification page will display any exceptions submitted
 - Select "Yes, Continue"
 - Any exceptions processed will get the status "Ship to ADC"
 - Items will not be able to be overridden to switch to held for recovery

Return Exception

Enter the details below to process a Return Exception. Put and RTID label on the item and send it back to the ADC.

STEP 1: SELECT INVENTORY TYPE

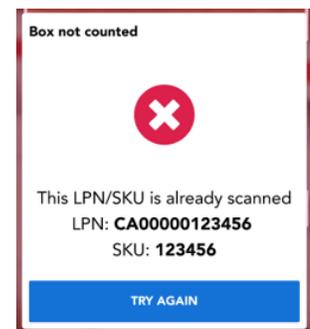
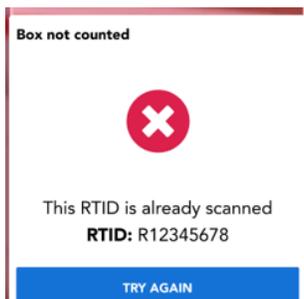
Select the type of the exception item being entered.

Inventory Type:

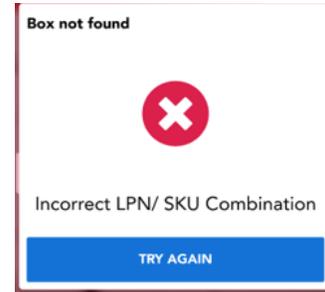
Select a Type 

9. Error Messages

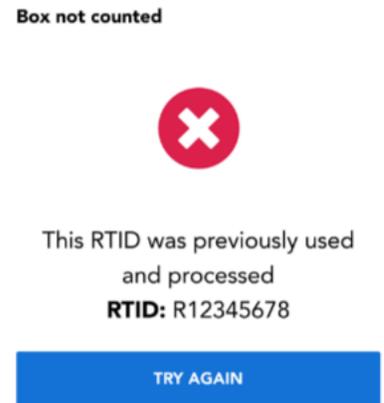
- If this error message is seen, that means you have already scanned this item/sku and is in your scanned tab currently



- If this error message is seen, that means you have already scanned this RTID and is already in the system, you must use a new RT
- Incorrect LPN/SKU: If this error message is seen, you are scanning the LPN and SKU that don't match and you are scanning something incorrect



- "RTID already processed" this is when an RTID is already scanned and processed within returns and the technician tries processing it again. A new RTID is needed or the item has already been successfully processed.



- Previously Delivered Form: If this error message is seen while submitting Previously Delivered/Used items you are entering a sales order number and should use the LPN and scan this item in as a New/RTS item

Previously Delivered 

Enter details below if this item was used by a customer.

RTID:

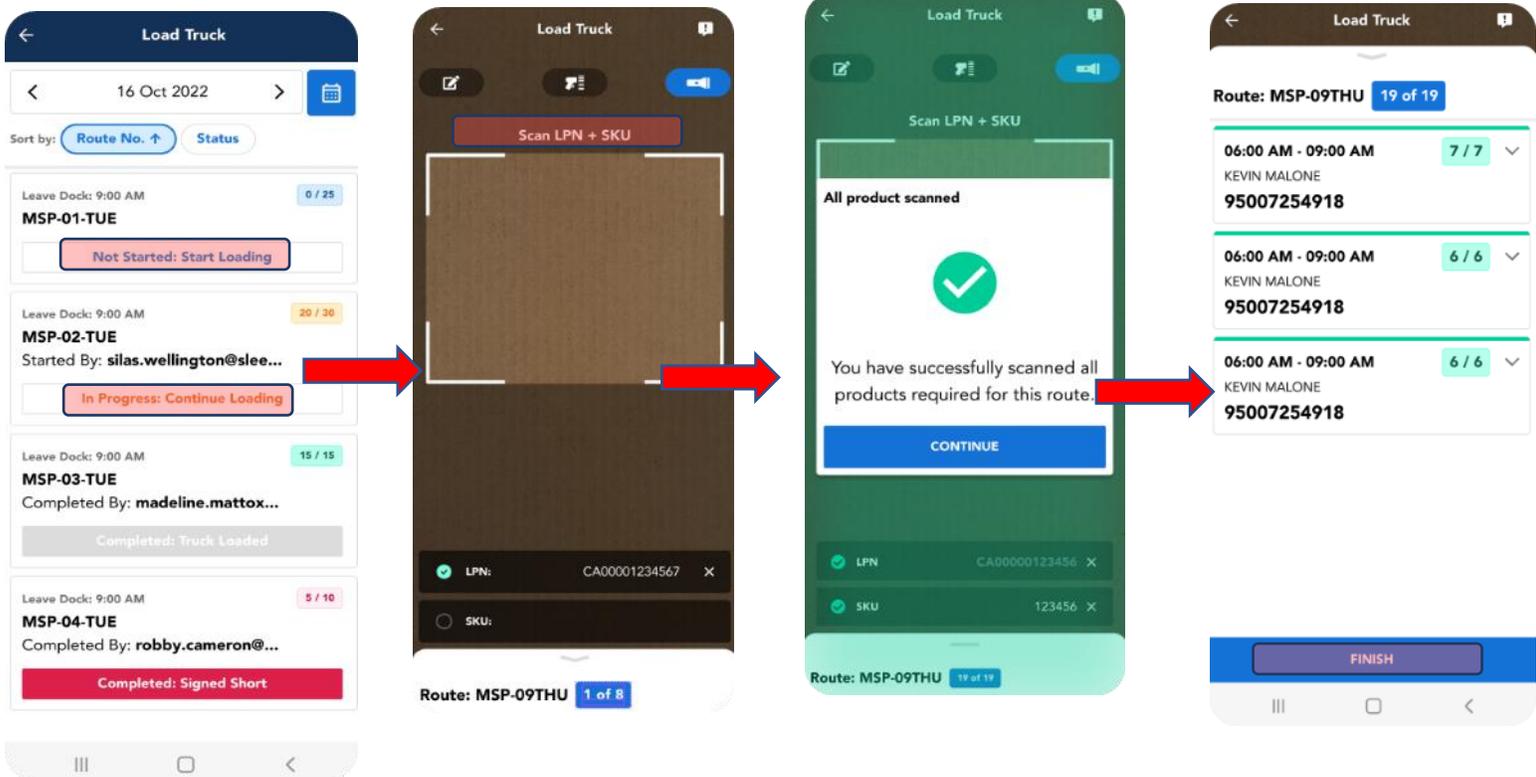
Order Number:

This item should be scanned or manually entered with the LPN

Load Truck Tile

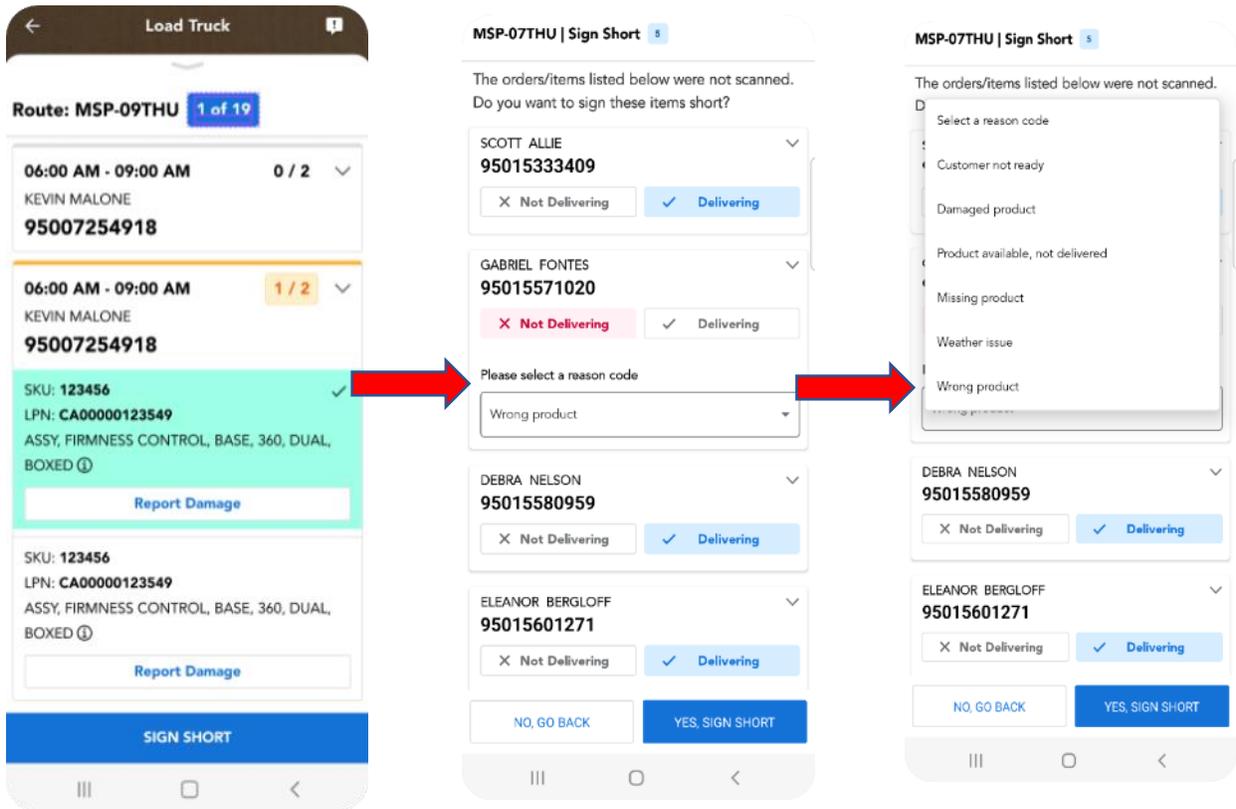
1. Scanning Routes

1. Select "Load Truck" Tile
2. A list of routes will be automatically populated, select "Start Loading, Continue Loading" on correct route
3. Once correct route is selected you will need to scan:
 1. LPN
 2. SKU
4. Once all products have been scanned you will receive a prompt stating "You have successfully scanned all product required for this route"
5. Once scanning is completed, select "Finish"



2. Signing Routes Short

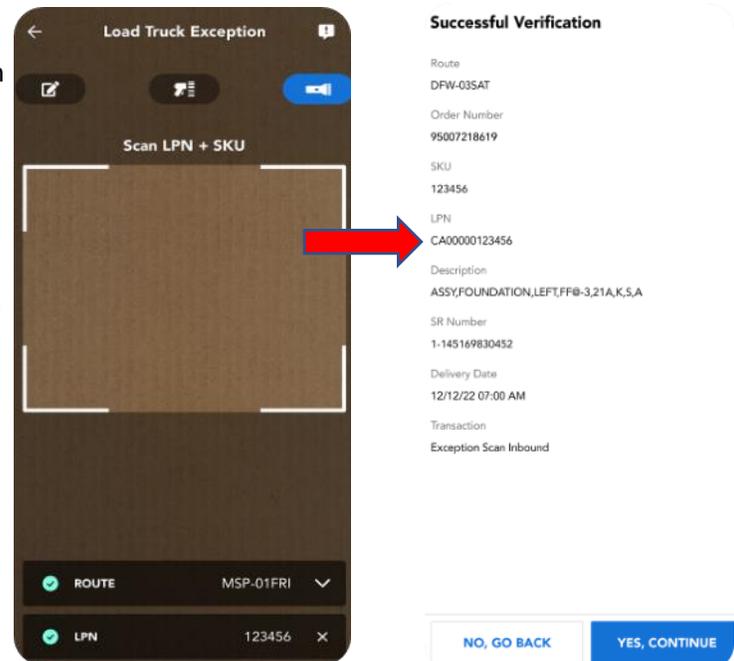
1. If all items have not been scanned, you will see the “Sign Short” button at the bottom of the screen. Select “Sign Short” button
2. You will see a list of all items, items that were not scanned will be listed as “Not Delivering”
3. Select reason code in dropdown



4. To confirm select “Yes, Sign Short”

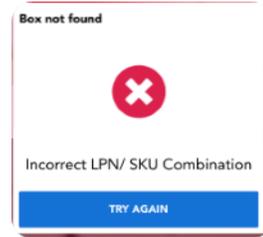
3. Scanning Exceptions

1. Select “Load Truck Exception” tile located on main screen
2. You will then need to scan the LPN + SKU
3. Once items are scanned you will see all the items details
4. If item details are accurate select “Yes, Continue” at the bottom of the screen

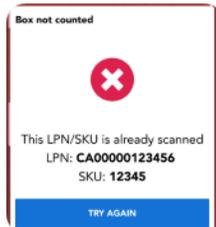


4. Error Messages

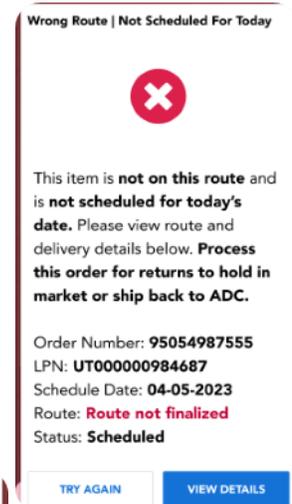
- If this error message is seen, the incorrect LPN/SKU has been entered. You will need to re-check the items and try again. If you continue to have difficulties scanning the LPN/SKU combination, send in a feedback & support form.



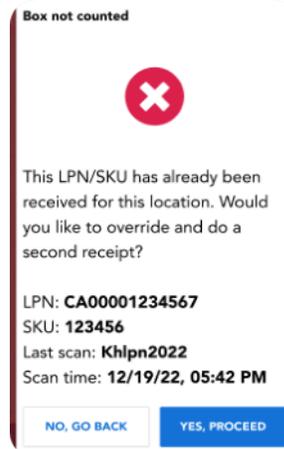
- If this error message is seen, you have already scanned the item and do not need to scan again.



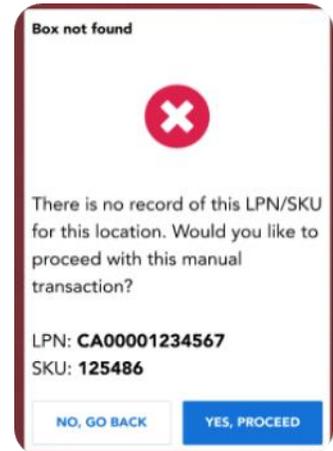
- If this error message is seen, the item you have scanned is not on your route. You will need to process the order for return to hold or have it shipped back to the ADC.



- If this error message is seen, the item has already been received in the location as a Load truck exception.



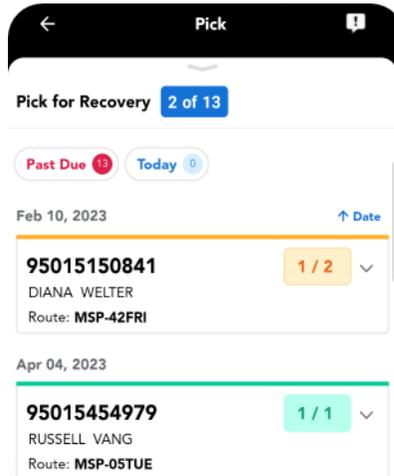
- If this error message is seen, there is no record on the LPN/SKU but you can proceed with a manual transaction. This will submit the status of the item as exception scanned.



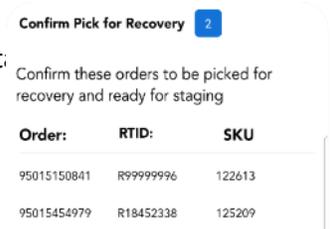
Pick Tile

1. Picking for Recovery

1. Select the “Pick” tile
2. Scan RTID labels located on all boxes
3. Once items have been scanned you will be able to see a list of items picked for recovery.
 - Orders that have been completely scanned will be green
 - Orders that are missing scans will be yellow



5. Select “Done Scanning” at the bottom of the screen
6. You will then see a screen with a list of items that were not scanned
 - These items will stay in the Recovery Lane
7. Select “Yes, Continue”
8. Confirm picked for recovery items
 - These orders will be picked for recovery and will be put into a ready staging.
9. Select “Yes, Confirm”



2. Changing Ship to ADC

1. In the pick tile, swipe the bottom drawer upwards
2. Once you have found the correct order, confirm order details are accurate
3. Select "Edit Status Ship to ADC"
 - This will update the status from "Pick Recovery Lane" to "Ship to ADC"
4. Select "Update Order"
5. After selecting update, you will receive a summary of the actions you have taken
 - Confirm all orders on the list are accurate as the status will be updated for them
6. Select "Yes, Confirm"
7. You will receive a CHOP.CHOP.BOOM! confirming items have been to the ship to ADC lane

Moving to Return to ADC

These items will be moved to the Return Lane in the Return to ADC tile, please confirm:

Order:	LPN:	RTID:
95014070987	CA12345678901	R32454012
95014070654	CA12345678901	R32454789
95014070321	CA12345678901	R32454456
95014070098	CA12345678901	R32454123

NO, GO BACK YES, CONFIRM

Moved to Return to ADC



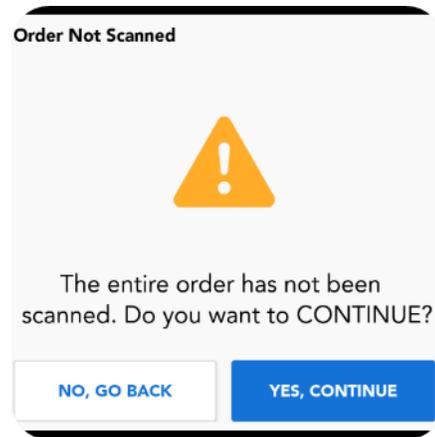
CHOP. CHOP. BOOM!

Order(s) have been moved from the Pick Recovery Lane to the Return to ADC Lane.

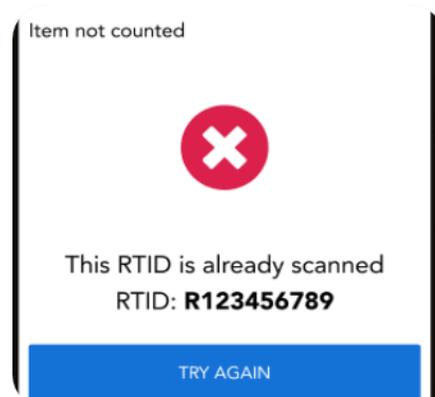
CLOSE

GO TO ADC TILE

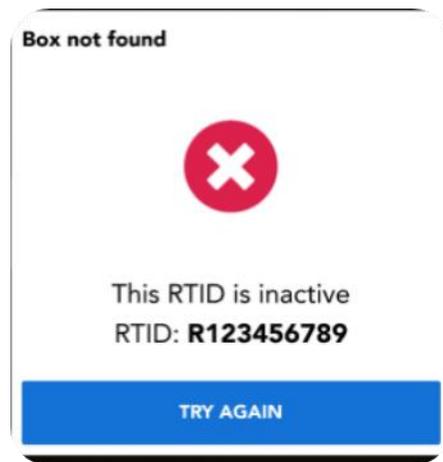
3. Error Messages



- If this error message is seen, the entire order has not been scanned from the list.



- If this error message is seen, the RTID is already scanned and doesn't need to be scanned.

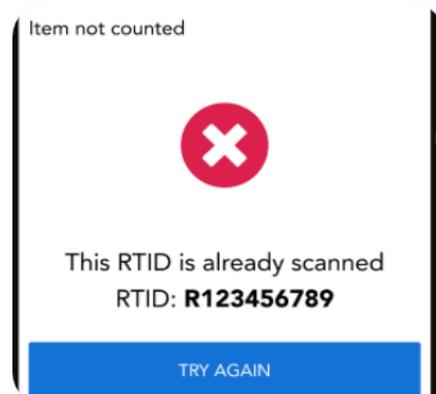


- If this error message is seen, the RTID is invalid and does not match the items on the list.

4. Return to ADC

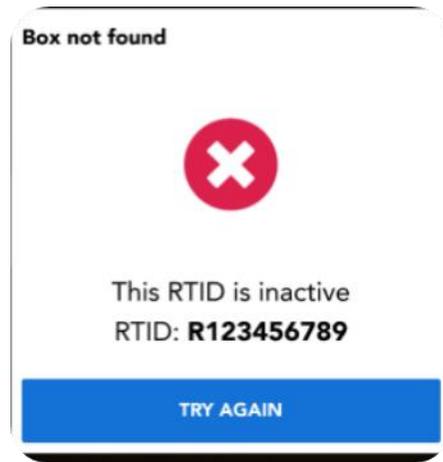
1. In the Return to ADC tile, swipe the bottom drawer upwards to view a list of orders being returned to ADC Lane
2. Swipe drawer down and begin scanning items
3. Scan RTID on each box
 - As you begin to scan boxes the items on the list will be changed to green as an indicator they have been scanned
4. You will then need to scan:
 1. Shuttle Driver ID
 2. Dock Team ID#
 3. Scan PRO#
5. Once all items have been scanned select "Done"

5. Error Messages



- If this error message is seen, the RTID is already scanned and does not need to be scanned.

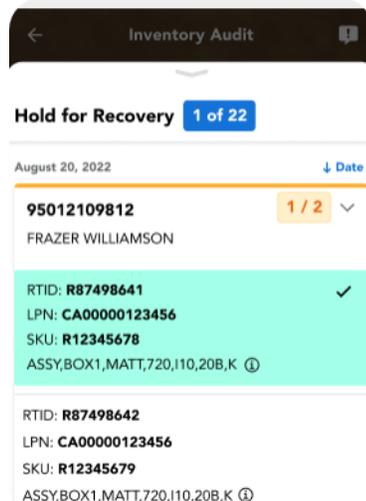
- If this error message is seen, the RTID is invalid and does not match the items in the list.



Inventory Audit Tile

1. Auditing Recovery

1. In the Inventory Audit tile, swipe the bottom drawer upwards to view a list of orders being “Held for Recovery”
2. Swipe drawer down and begin scanning items
3. Scan RTID on each box
 - As you begin to scan boxes the items on the list will be changed to green as an indicator they have been scanned



4. Once all items have been scanned select “Confirm Audit”
5. You will see a last confirmation screen check the box that confirms all items have been scanned

Confirm Inventory Audit 12

Missing 4 Extra 2 Scanned 6

RTID:	LPN:	Status:
R32454784	MS00000123555	Missing
R32454784	MS00000123555	Extra
R32454784	MS00000123555	Extra
R32454784	MS00000123555	Scanned

Click here to confirm all items have been found and scanned for this inventory audit.

NO, GO BACK YES, CONFIRM

6. Select "Yes, Confirm"

2. Missing Scanned Items

1. First "Partial Delivery or Previously Scanned" page will display and then if they select either of those options for the items will not display on the "Returns verification" page.

8:02 100%

Partial Delivery or Previously Scanned 8

Make a selection below for orders partially delivered to a customer, or previously scanned. If items are missing, select the continue button.

Tap to learn more about partially delivered orders or previously scanned items in recovery. >

95007218618 1

CARTER EKSTROM BOTHMAN
Next Delivery: **09/23/2023**

SKU: **123456**
LPN: **CA00000123456**
ASSY, FIRMNESS CONTROL, BASE, 360 ⓘ

Please verify item status if it was delivered to a customer or previously return scanned and is held for rapid recovery.

Item Delivered In Recovery Lane

2. If you don't select delivered or previously scanned the missing item will display on the returns verification for you to report as missing.

Returns Verification 22

Please verify the condition of each box, or select "Item Missing" if item(s) can't be found (Note: Order will be given status Ship to ADC if items are selected missing).

You Have 9 Missing Items. Tap to learn more! >

95007218618 1 / 2 ^
KAREN THOMPSON
Next Delivery: **09/23/2023**

RTID: **R12345678**
SKU: **123456**
LPN: **CA00000123456**
FOUNDATION,INTEGRATED-KING,SNL ⓘ

 **Report Opened or Damaged**

RTID: **R12345678**
SKU: **123456**
LPN: **CA00000123456**
ASSY, FIRMNESS CONTROL, BASE, 360 ⓘ

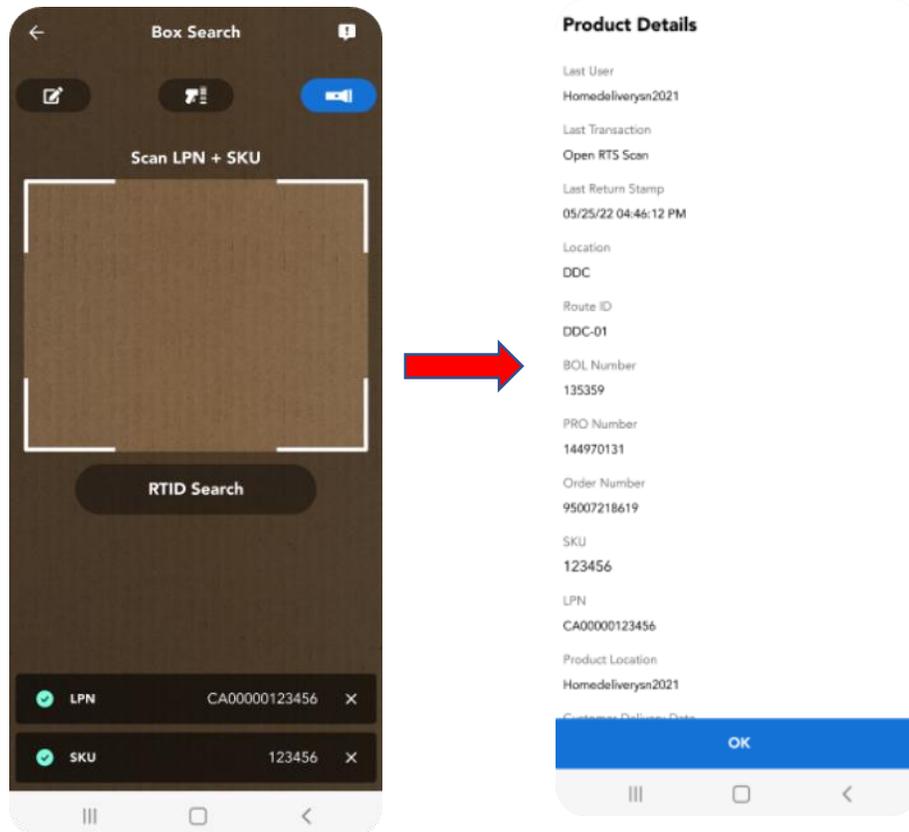
Please verify item is missing from this order.

3. You will be asked to mark every item not scanned
 - Item Missing: If item is truly missing select option
 - Scan now: Will give you the option to scan the box in case it was missed
4. An "Incomplete Audit" screen will appear, confirm accuracy, and select "Yes, Continue"
5. A list of items both scanned and not scanned will populate, if the list is accurate check confirmation box and select "Yes, Confirm"
6. You will receive a final confirmation screen, select "Confirm Audit" to finish



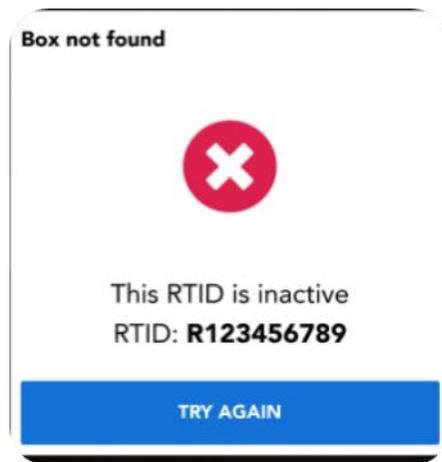
Box Search Tile

1. Searching Items
2. To search for boxes, select the “Box Search” tile
3. Scan the LPN+SKU on the box
4. A screen with all the box details including order number will show on the screen



- If the box is not found, you will receive the error message below

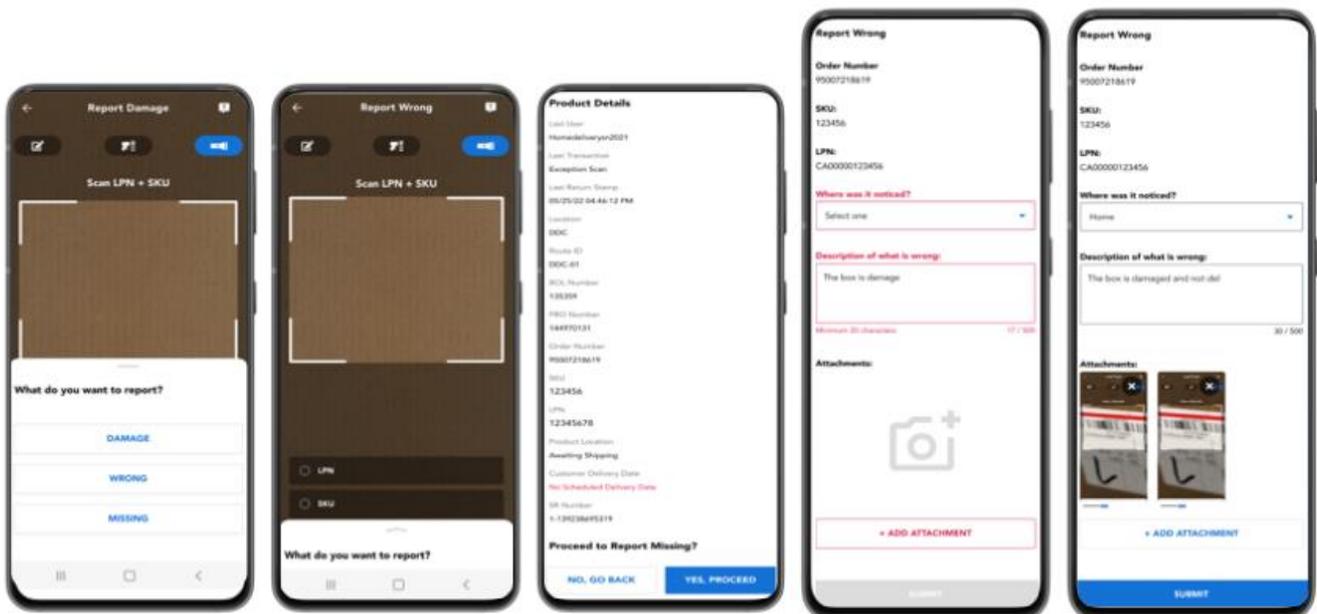
1. Error Messages



- If this error message is seen, the RTID is inactive and is not a valid searchable RTID.

Report Damage Tile

1. To report damaged boxes, select the “Report Damage” tile
2. Swipe the bottom drawer up to start report
3. Select one of the three options provided
 1. Damage
 2. Wrong
 3. Missing
4. After selecting the reason swipe drawer down and scan the box to retrieve box details
5. Confirm box details are accurate and select “Yes, Proceed”
6. Fill in all required fields
 - Remember to upload images
7. After field have been completed select “Submit



History Tile

1. To view history, select the “History” tile
2. You will now be able to view a detailed history of the scans you have completed on your device. You will not be able to see scans that other technicians have processed.

