

RETURNS TRACKER

Refine customer experience in real time

Instant Visibility, Real-Time Updates

Get customers the answers they need quicker with SalesPad® Returns Tracker. Ensure that customer issues are followed from start to finish and empower your Sales and CSR teams to provide real-time status updates at any point in time.

If your company deals with a high volume of returns, tracking down customer information is time-consuming, or your CRM often requires input from multiple departments, Returns Tracker is the customer service module you need. Find critical information in seconds, ensure prompt follow-up to customer requests, and significantly improve visibility of data.



Get up-to-the-minute status updates



Identify trends to prevent recurring issues



Use workflows to set up routing and coordinate visibility



Gain a real-time view of customer data

The screenshot displays the SalesPad Returns Tracker interface. It includes a top navigation bar with tabs for Customer Search, Sales Monitor, Returns Tracker Detail Search, and Returns Tracker Entry: 1030. The main area is divided into two sections: Customer Information and Case Details. The Customer Information section shows fields for Customer Num (ADAMPARK0001), Customer Name (Adam Park Resort), Ship To Addr (PRIMARY), and Customer Addr (Roberta Masouras, Suite 9876, 321 Chestnut Drive, Indianapolis, IN 46206-1391, USA, P: (317) 555-0102). The Case Details section shows fields for Contact, Status (New), Queue (NEW CASE), Open Date (4/11/2024 11:44:49 AM), Closed Date, Sales Doc ID (STDINV), Sales Doc Num (AORD00002), Sales Doc Type (INVOICE), Customer PO, Sales Rep ID (PAUL W.), Sales Territory, and Entered By (sa). Below these sections is a table with columns for Document Nu..., Type, Source, Doc ID, Item Number, Item Description, Qty, UOM, Price, Cost, Ext Price, and Whse. The table contains one row with Document Nu... RTN1035, Type Return, Source Open, Doc ID RTN, Item Number SW002, Item Description Only Hope Soap Men's Natural Soap, Qty 1, UOM EACH, Price 10.00, Cost 4.00, Ext Price 10.00, and Whse WAREHOUSE. A total of 10.00 is shown at the bottom right of the table.

"Cavallo® takes the headache out of running your business."

- Robb Delprado, Senior Presales Architect at Accelerynt Inc

Key Features

- Quickly generate a reorder or return
- Track issues from start to finish
- Assign specific users to cases to ensure prompt follow-up
- Attach additional documents, item notes, and past customer requests to issues

Improve Your CRM Strategy

Diagnose recurring problems by tracking when, where, and how they occur. By creating as many unique issue, cause, and resolution codes as you need, you can monitor what’s causing customer issues, determine the best resolutions, and take the necessary steps to prevent them.

Customer SearchSales MonitorReturns Tracker Detail SearchReturns Tracker Entry: 1030

CloseSavePrint

Customer Information

Customer Num:ADAMPARK0001

Customer Name:Adam Park Resort

Ship To Addr:PRIMARY

Roberta Masouras
Suite 9876
321 Chestnut Drive
Indianapolis, IN 46206-1391

Customer Addr:USA
P: (317) 555-0102

Case Details

Contact:

Status:New

Queue:NEW CASE

Open Date:4/11/2024 11:44:49 AM

Closed Date:

Entered By:sa

Sales Doc ID:STDINV

Sales Doc Num:AORD00002

Sales Doc Type:INVOICE

Customer PO:

Sales Rep ID:PAUL W.

Sales Territory:

DetailsUser FieldsResourcesInteractionsAuditAR TransactionsReorders/Returns

Add DetailDelete DetailShow Historical

Case Details

Detail ID	Item Number	Serial Lot Number	Qty	Issue	Cause	Resolution
1,041	SW002		1	Damaged	Shipping Dam...	Replace- No ...

Detail Properties

Detail ID1041

Issue

Issue ID2

IssueDamaged

DescriptionDamaged caused in house, by shipping center, b...

Cause

Cause ID34

CauseShipping Damage- FedEx

DescriptionThe shipping carrier damaged the item in transit.

Resolution

Resolution ID1

ResolutionReplace- No Charge

DescriptionReplace- No charge

Comment

