AIMSPlus⁺ SOFTWARE

Market Order App

Project Manager
Full Returns User Guide

Tellworks
LOGISTICS
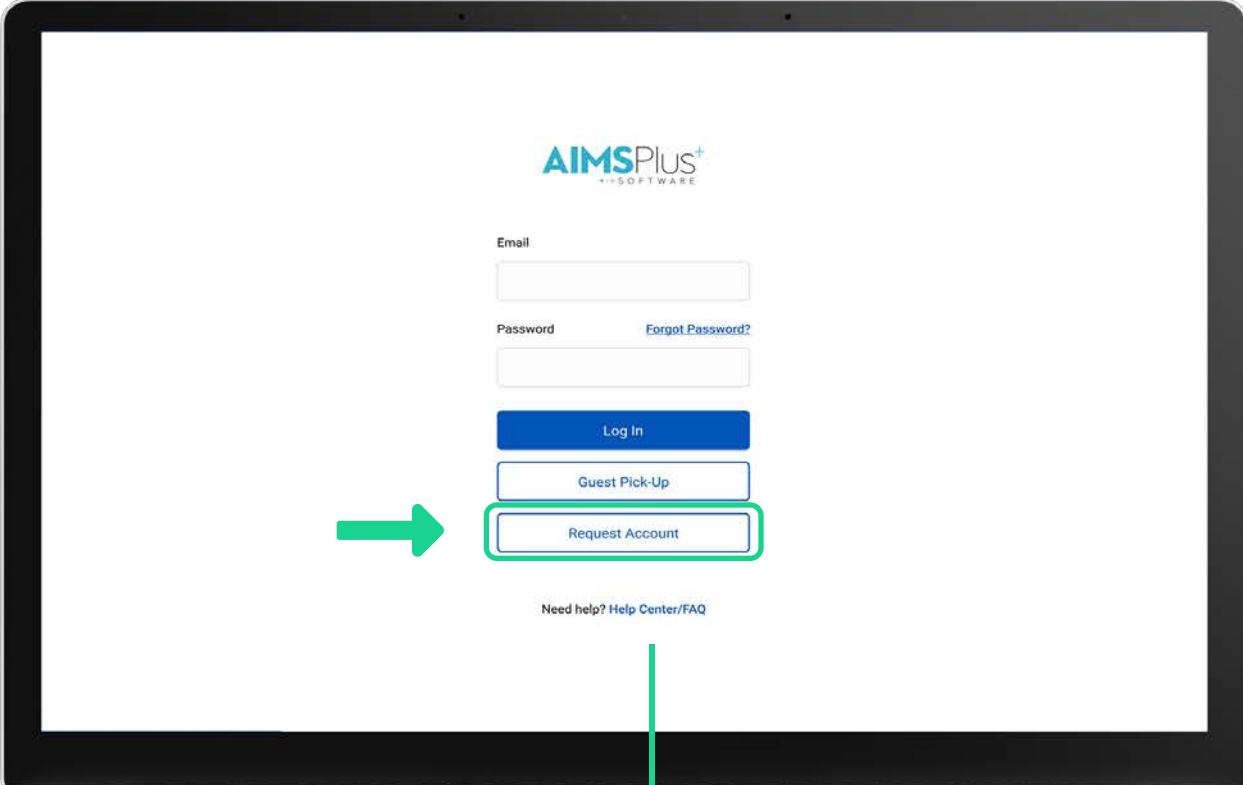
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Create an Account

You must create an account and get approval first
before you are able to use the app

Create an Account

Request a New Account

Click on "Request an Account" from the log-in menu.

Need help?

Access the Help Center, without logging in, to find published answers, trainings, and training documents, as well as, submit a ticket directly to Tellworks for individual assistance.

Create an Account

User Information

1. Select the role you would like to register an account for
2. Fill out your personal information:
   - First and last name
   - Phone number
   - Email Address
   - Select your role
   - Company
   - Select your market(s)
   - Create a password for your account

Create an Account

![Tellworks Logistics logo]

Accept the Terms & Conditions

Tellworks will email you when your account is approved. (Activation typically arrives within 48 hours).

Return Requests
Return Management

Project managers have the ability to approve, reject, or adjust Return Requests submitted by a project manager, construction manager, general contractor, or technician.

Return Requests

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Navigate to Return Requests

1. Expand 'Return Management - Monitor' category.
2. Click on 'Return Requests' from the navigation on the left hand side of the screen.
3. Select the dropdown to switch between markets.
4. Select the filter button to add filters views to the table.
5. Select a 'Return #' to view return receipt which includes packing slip details.

Return Requests

Full Kit Return Details

Full Kit Return details include the return request information summary at the top, followed by a digital view of the return order. Details include:

- Site ID
- SKU
- MFG Part #

- Description
- Condition
- BOM Quantity Deployed

- RMA Quantity
- BOM Asset Tag/Serial # Deployed
- RMA Asset Tag/Serial #

Return Requests
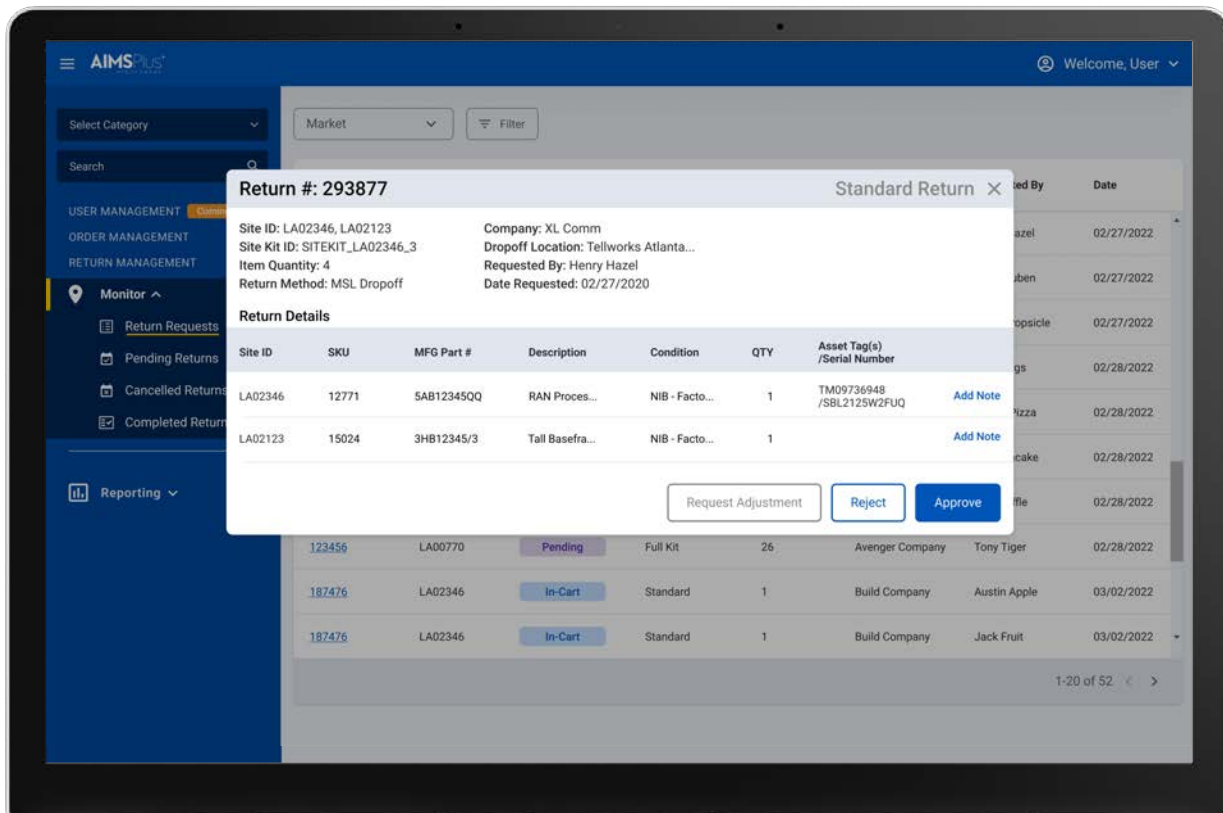
Standard Return Details

Standard Return details include the return request information summary at the top, followed by a digital view of the return order. Details include:

- Site ID
- SKU
- MFG Part #

- Description
- Condition
- Item Quantity

- Asset Tag/Serial #

Return Requests

Approving a Return Request

After reviewing the return details, select the 'Approve' button to approve the return request. Once a request is approved the contractor will then have the ability to schedule for drop-off and shipments.
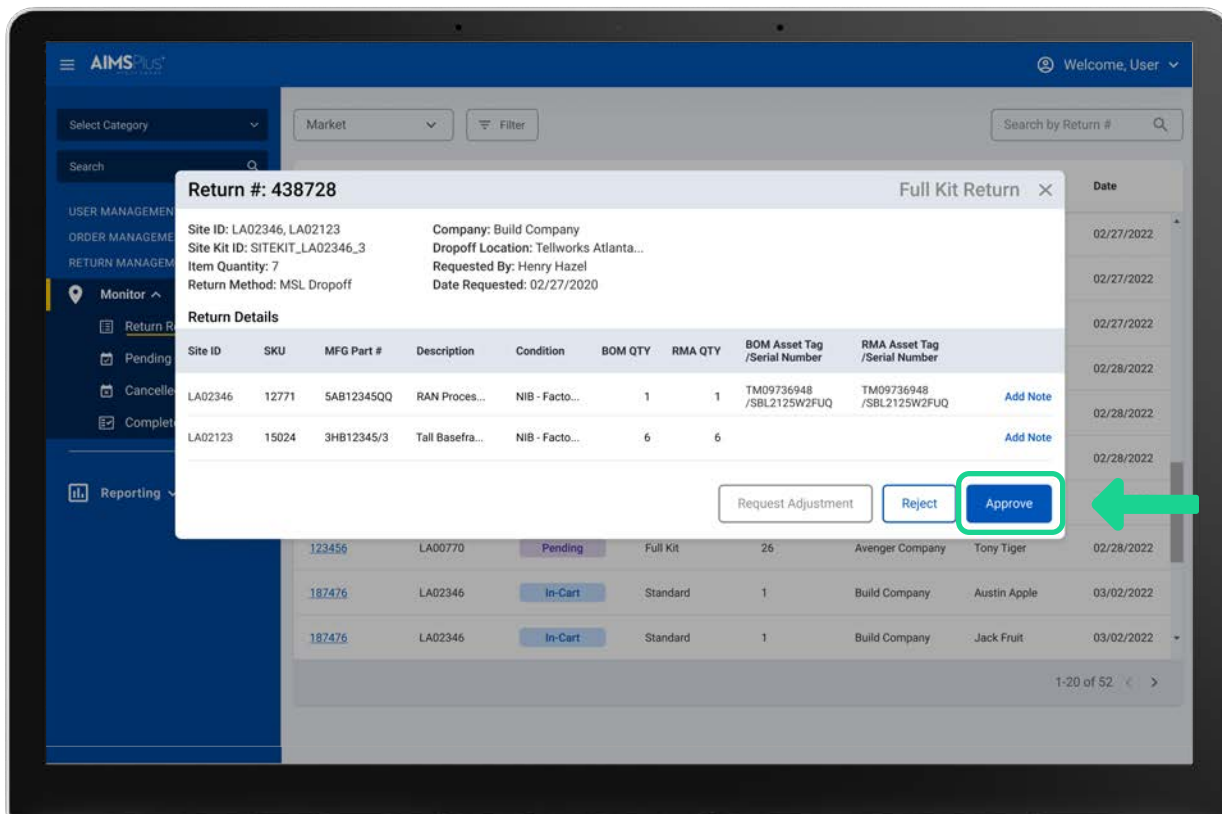
Return Requests

Return Approved

After you have approved the request, you will be taken back to the 'Return Requests' table. A green confirmation banner will appear to acknowledge successful approval.

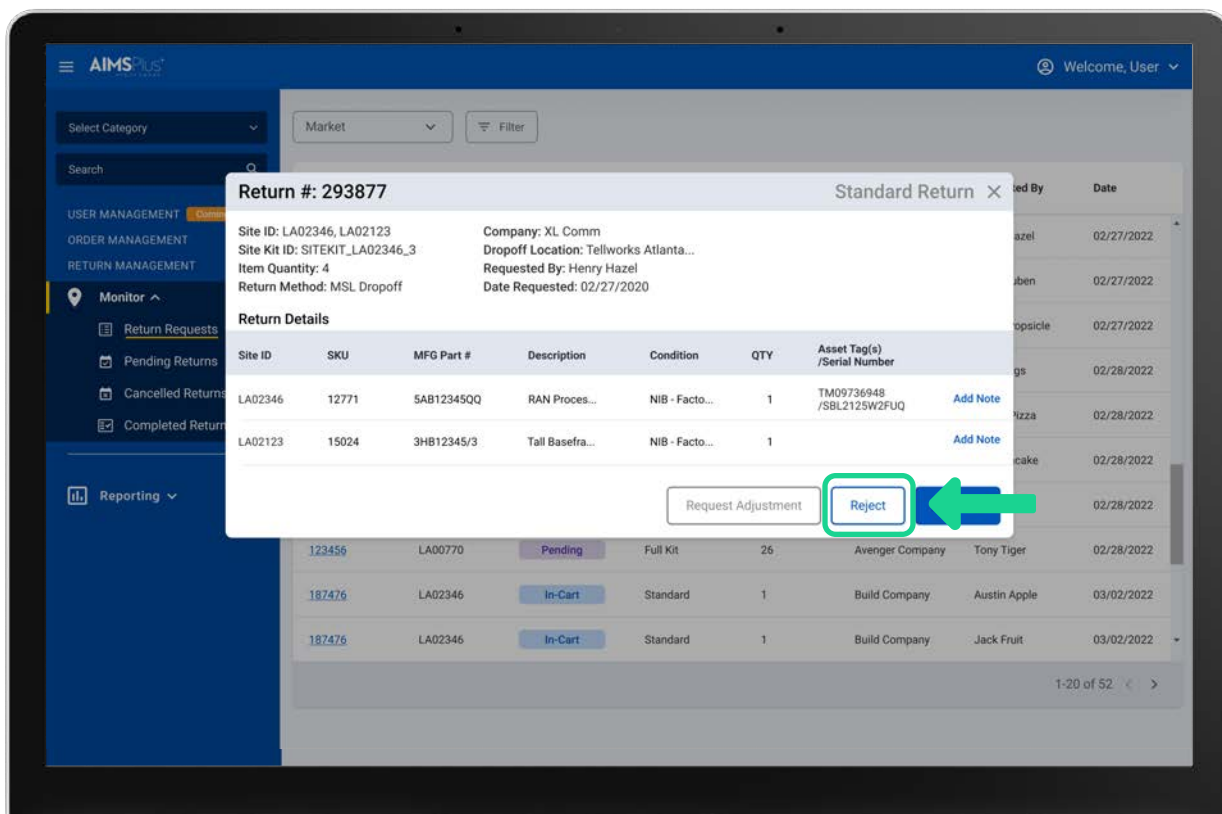*Return will now move to Pending Returns

Return Requests

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Rejecting a Return Request

After reviewing the return details, select the 'Reject' button to reject the return request. Once a request is rejected the contractor will then have the opportunity to modify the request and resubmit.

Return Requests

Rejecting a Return Request

Provide a reason for why the return was rejected, then select the 'Save' button to confirm. Once a request is rejected the contractor will be required to cancel the RMA.

Return Requests

Rejection Confirmation

After providing the appropriate reason for rejecting a return request, confirm the decision by selecting the 'Yes, reject' or 'Cancel' button.
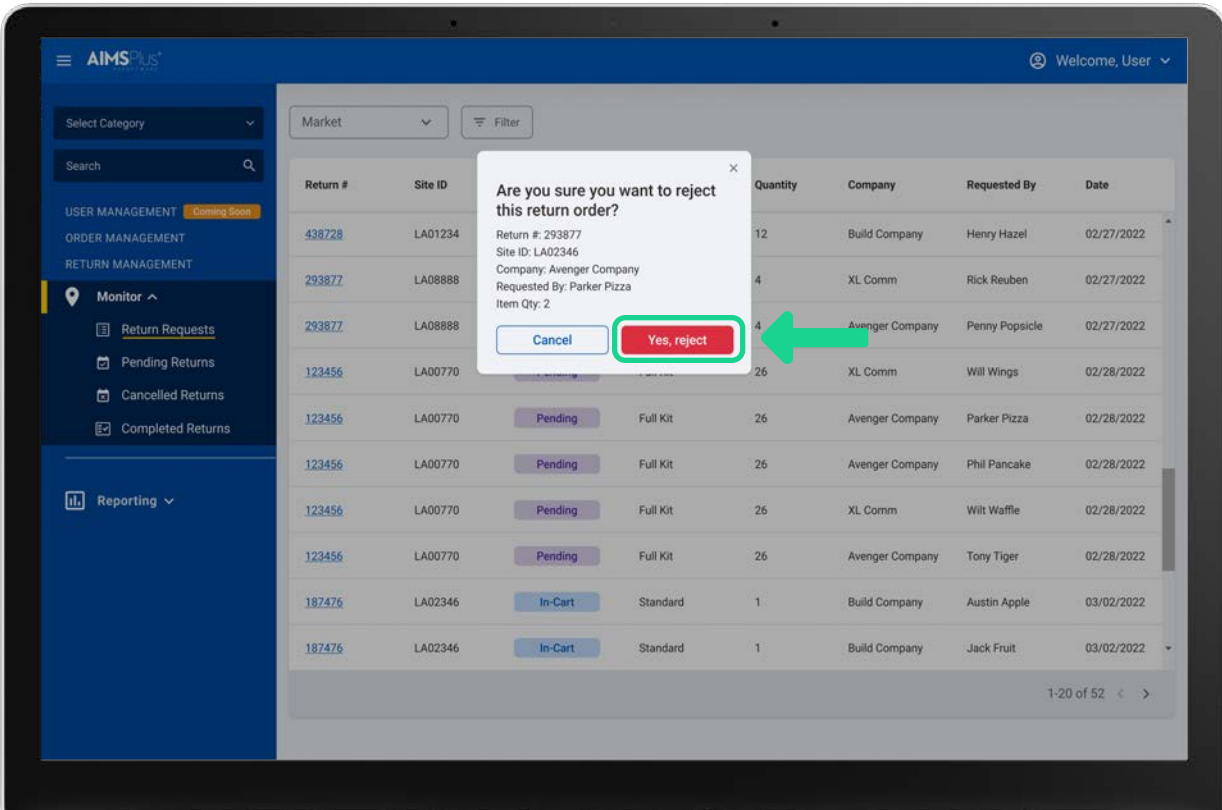
Return Requests

Rejection Confirmation

After you have rejected a return request, you will be taken back to the 'Return Requests' table. A green confirmation banner will appear to acknowledge successful rejection. Return status will reflect the rejected status.

Return Requests

Requesting an Adjustment

After reviewing the return details and an adjustment needs to be made to the return order, select the 'Add Note' button to provide a reason/ explanation for what needs to be adjusted on the order. This will return the RMA to the GC for adjustment.

Return Requests

Requesting an Adjustment

After selecting 'Add Note' button, complete the following to request an adjustment on the return request:

1. Provide a reason/explanation for what needs to be adjusted on the order.
2. The 'Request Adjustment' button will activate when a note has been provided for at least one return item. A return request cannot be approved once a note has been added.
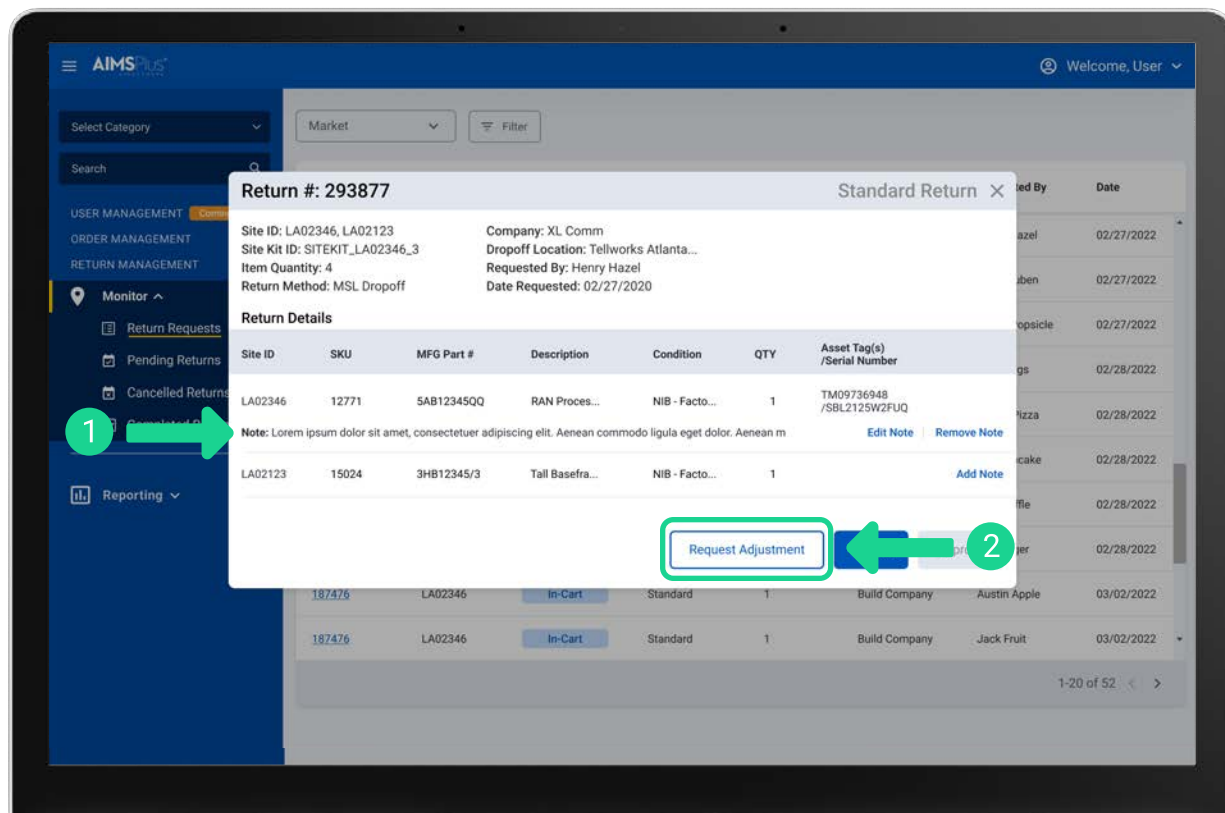
Return Requests

Adjustment Request Confirmation

After providing the appropriate reason for requesting an adjustment for a return request, confirm the decision by selecting the 'Yes, submit' or 'Cancel' button.
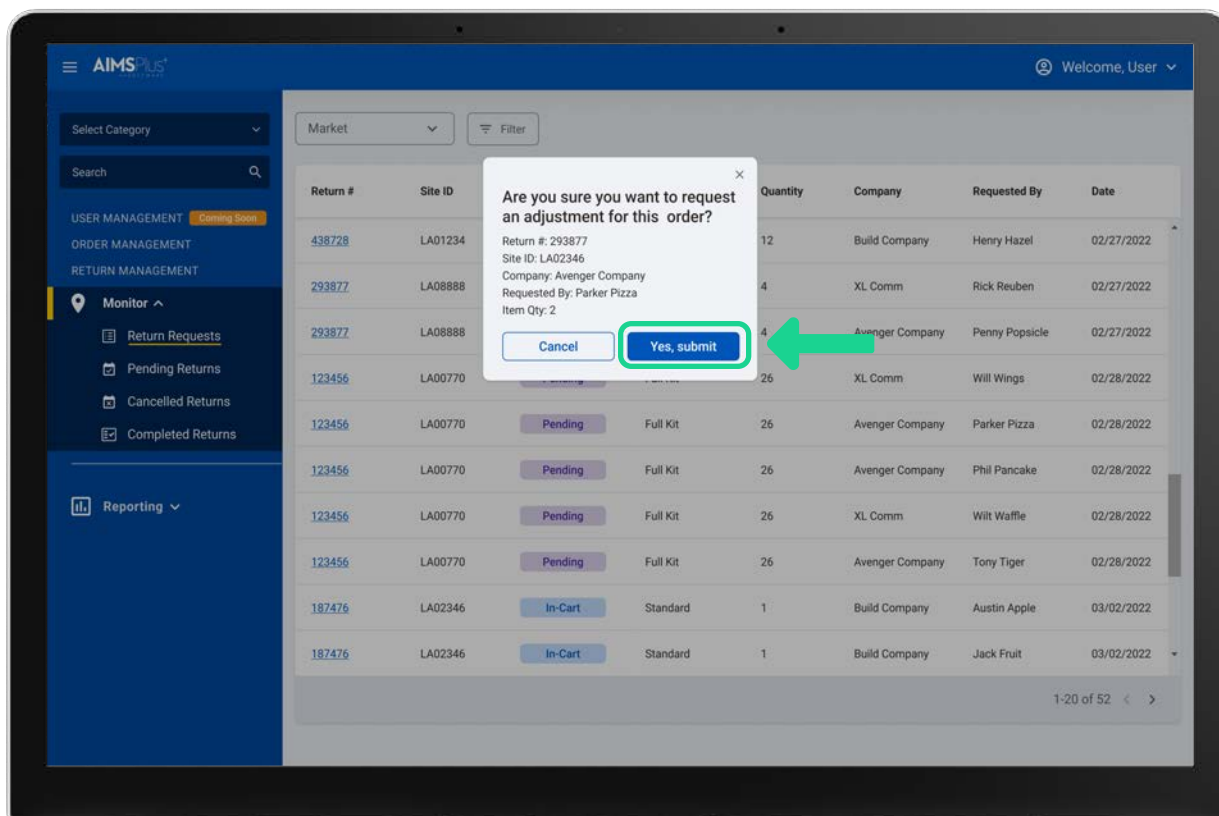
Return Requests

Adjustment Request Confirmation

After you have requested an adjustment for a return request, you will be taken back to the 'Return Requests' table. A green confirmation banner will appear to acknowledge successful adjustment request.

Pending Returns
Return Management

Project managers have the ability to view returns that have been approved.

Pending Returns

Navigate to Pending Returns

1. Expand 'Return Management - Monitor' category.
2. Click on 'Pending Returns' from the navigation on the left hand side of the screen.
3. Select the dropdown to switch between markets.
4. Select the filter button to add filters views to the table.
5. Each return represents an RMA that has been approved. Select a 'Return #' to view return receipt which includes packing slip details.

Pending Returns

Full Kit Return Details

Full Kit Return details include the return request information summary at the top, followed by a digital view of the return order. Details include:

- Site ID
- SKU
- MFG Part #

- Description
- Condition
- BOM Quantity Depoyed

- RMA Quantity
- BOM Asset Tag/Serial # Deployed
- RMA Asset Tag/Serial #

Pending Returns

Standard Return Details

Standard Return details include the return request information summary at the top, followed by a digital view of the return order. Details include:

- Site ID
- SKU
- MFG Part #
- Description
- Condition
- Item Quantity
- Asset Tag/Serial #

Pending Returns

Cancel a Pending Return

Select the 'Cancel' button to cancel a scheduled or approved return.

Pending Returns

Cancellation Confirmation

After selecting the 'Cancel' button, confirm the decision by selecting the 'Yes, cancel' or 'No' button.

Return Requests
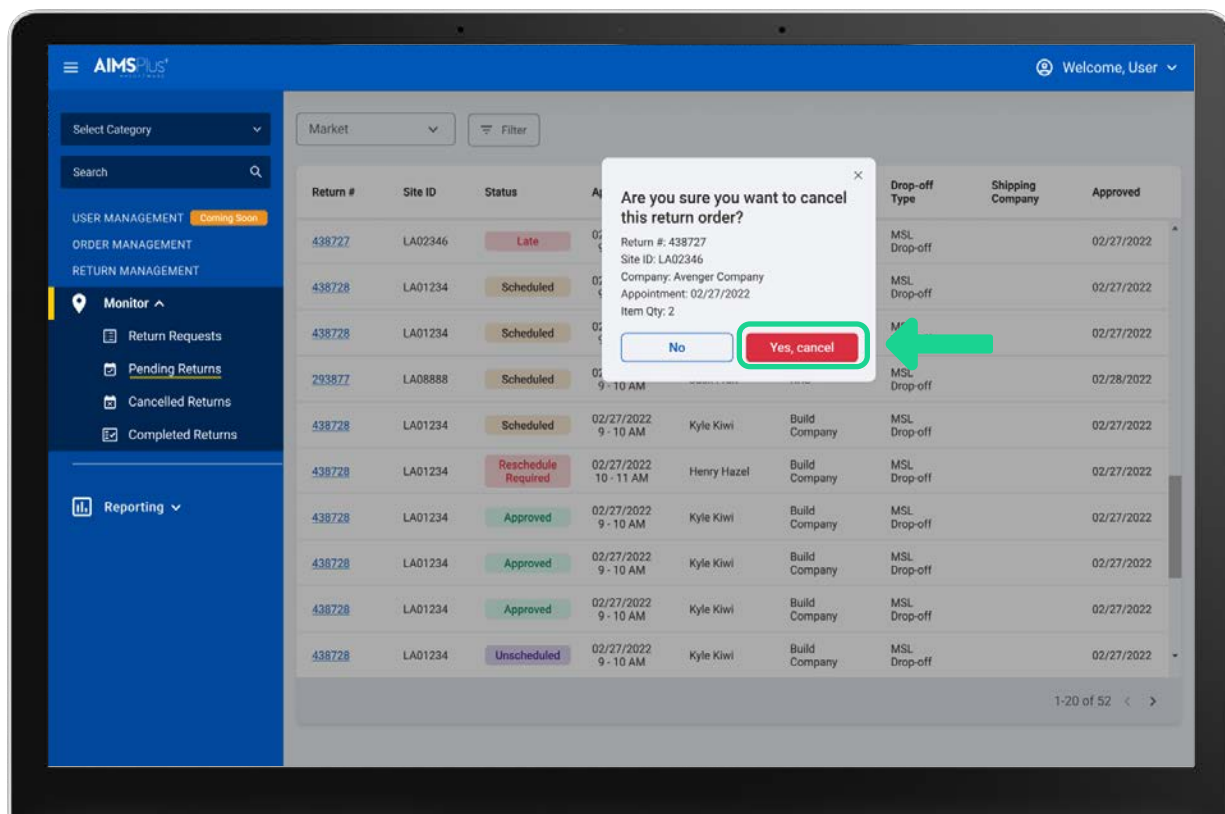
Cancellation Confirmation

After you have cancelled a pending return, you will be taken back to the 'Pending Returns' table. A green confirmation banner will appear to acknowledge successful cancellation. Return status will reflect the cancelled status.

Cancelled Returns
Return Management

Project managers have the ability to view returns that have been cancelled.

Cancelled Returns

Navigate to Cancelled Returns

1. Expand 'Return Management - Monitor' category.
2. Click on 'Cancelled Returns' from the navigation on the left hand side of the screen.
3. Select the dropdown to switch between markets.
4. Select the filter button to add filters views to the table.
5. Each return represents a return that has been cancelled. Select a 'Return #' to view return receipt which includes packing slip details.
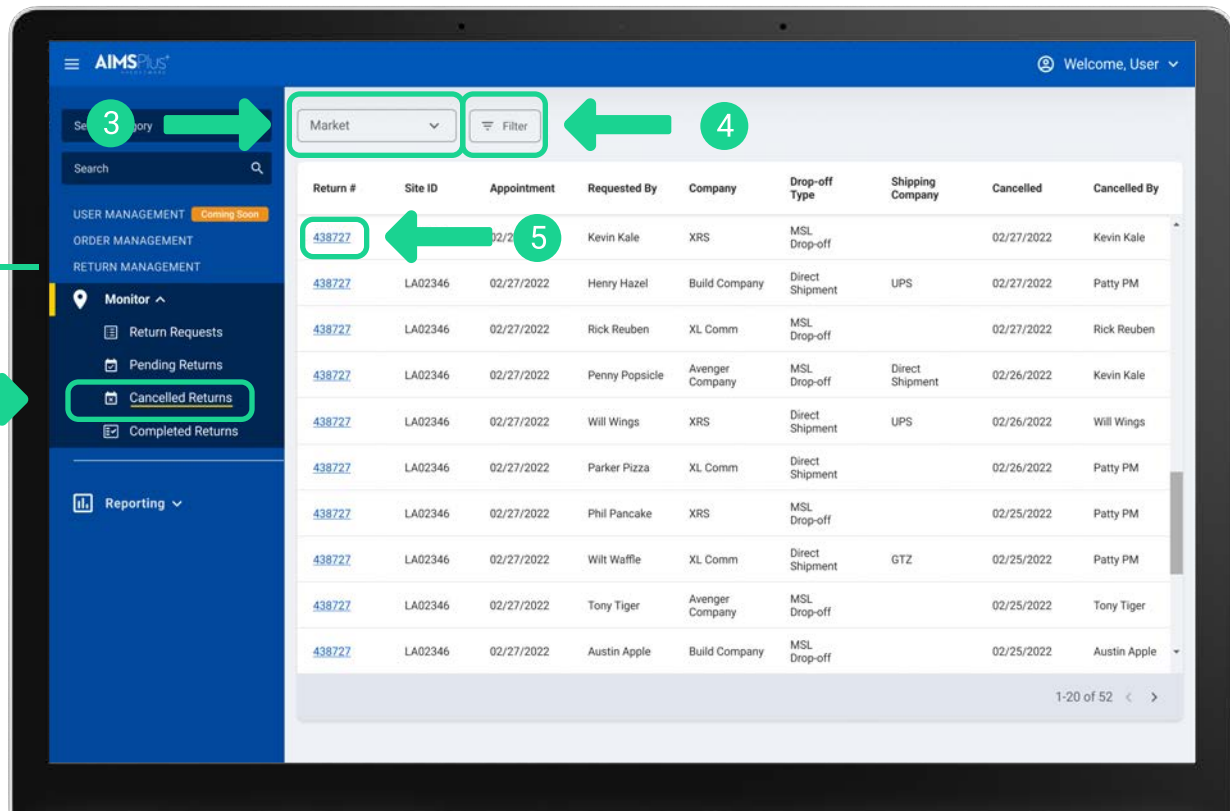
Cancelled Returns

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Full Kit Return Details

Full Kit Return details include the return request information summary at the top, followed by a digital view of the return order. Details include:

- Site ID
- SKU
- MFG Part #

- Description
- Condition
- BOM Quantity

- RMA Quantity
- BOM Asset Tag/Serial #
- RMA Asset Tag/Serial #

Cancelled Returns

Standard Return Details

Standard Return details include the return request information summary at the top, followed by a digital view of the return order. Details include:

- Site ID
- SKU
- MFG Part #

- Description
- Condition
- Item Quantity

- Asset Tag/Serial #

Completed Returns
Return Management

Project managers have the ability to review returns that have been completed based on date and time.

Completed Returns

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Navigate to Completed Returns

1. Expand 'Return Management - Monitor' category.
2. Click on 'Completed Returns' from the navigation on the left hand side of the screen.
3. Select the dropdown to switch between markets.
4. Select the filter button to add filters views to the table.
5. Each return represents a return that has been completed by the GC. Select a 'Return #' to view return receipt which includes packing slip details.

Completed Returns

Return Authorization

1. Select 'View Authorization' to see the digital signature of the individual who picked up the material.
2. Export PDF
3. Return Type
4. Return Details
5. If the following do not match, you will see a red 'X' to indicate a discrepancy in what was on the return order vs what was physically returned:
   a. RMA Quantity vs Return Quantity
   b. RMA Asset Tag/Serial # vs Return Asset Tag/Serial #
   c. RMA Condition vs Return Condition

Completed Returns

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View Authorization

After clicking 'View Authorization' you will see a pop-up screen that shows the digital signature of the individual who returned the material.
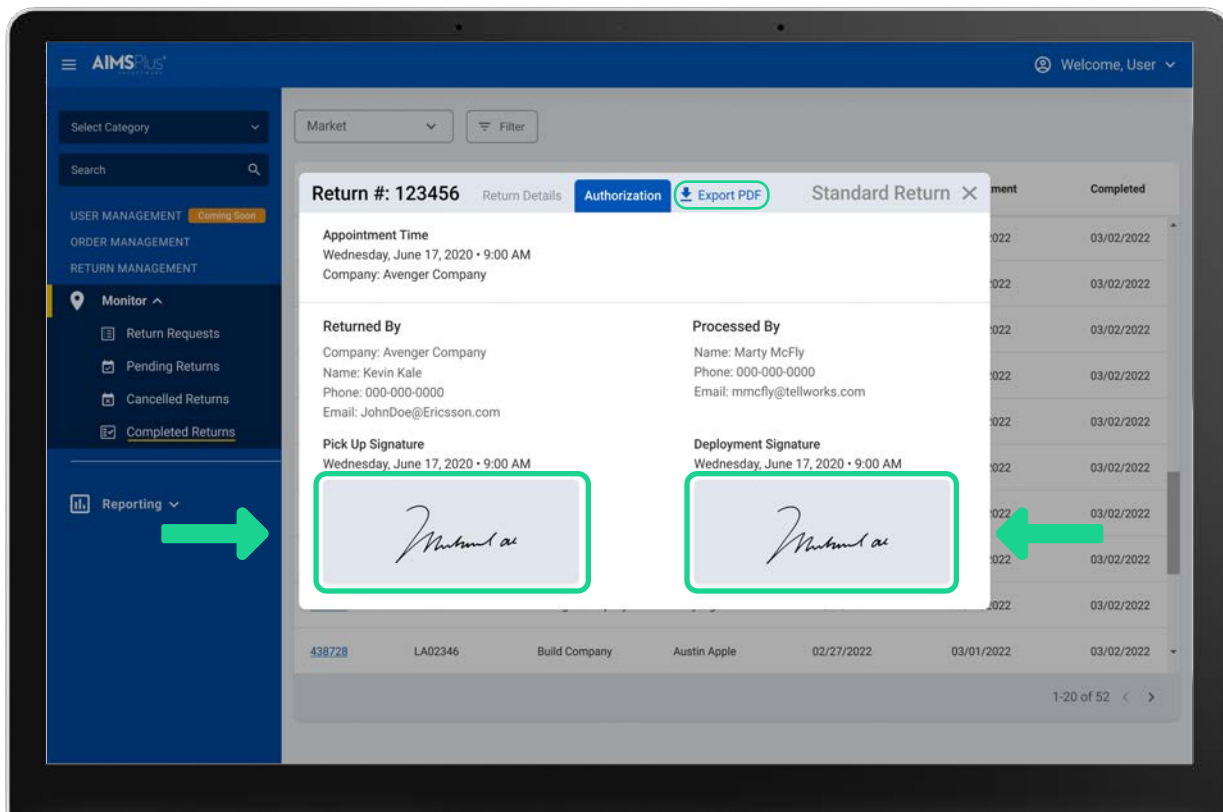
Account Information

All users have access to their account where users can review profile information, markets, and change the current password.

Account Information

Navigate to Account

Click the hamberger menu from any page to pull out quick access to Account and other features.
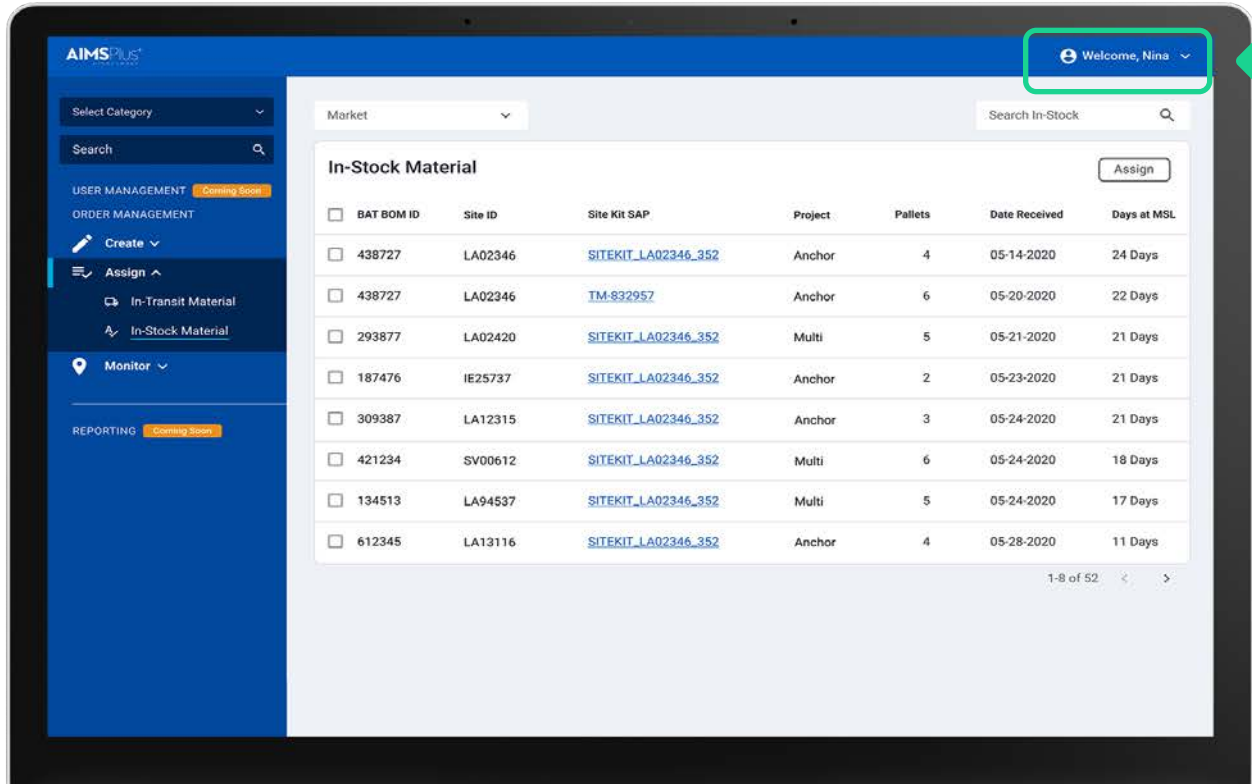
Account Information

Navigate to Account

Menu will appear from the side giving direct acces to the Home page, Account, Invite a Subcontractor, Help Center, and Logging out.
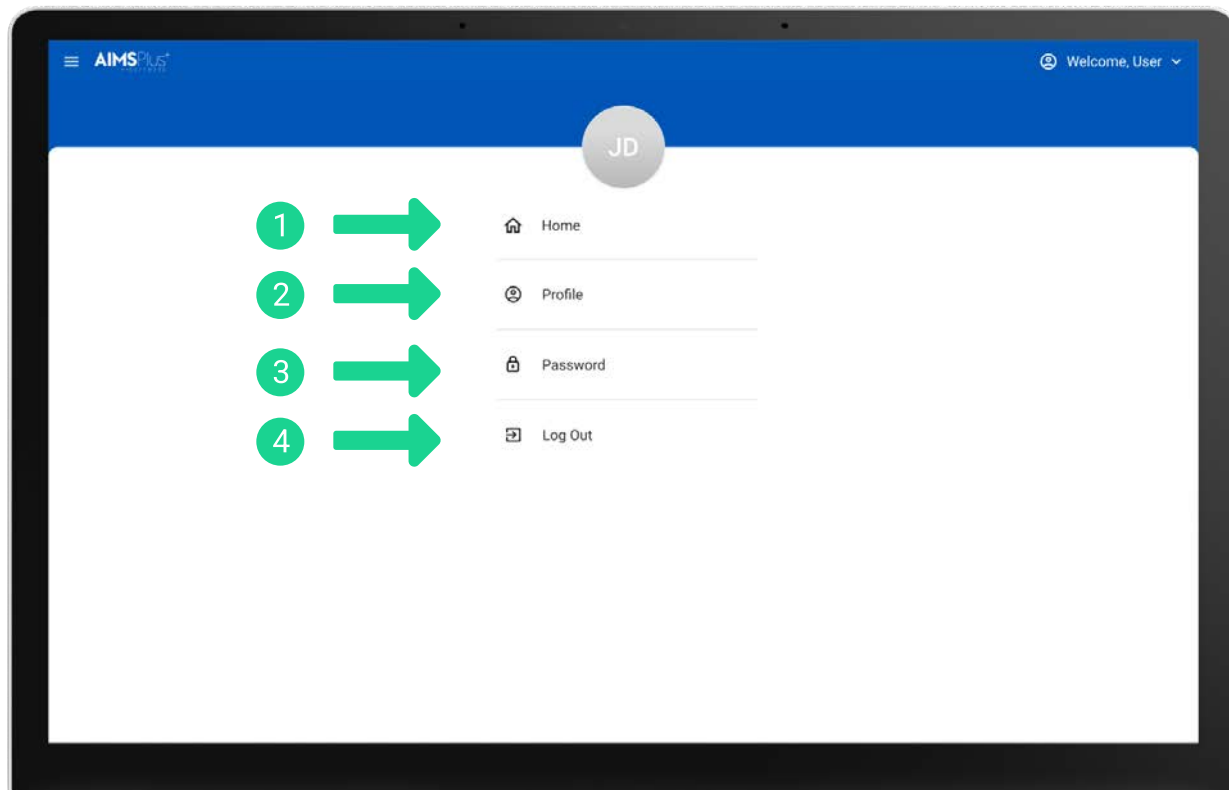
Click on 'Account' to access the Account homepage.

Account Information
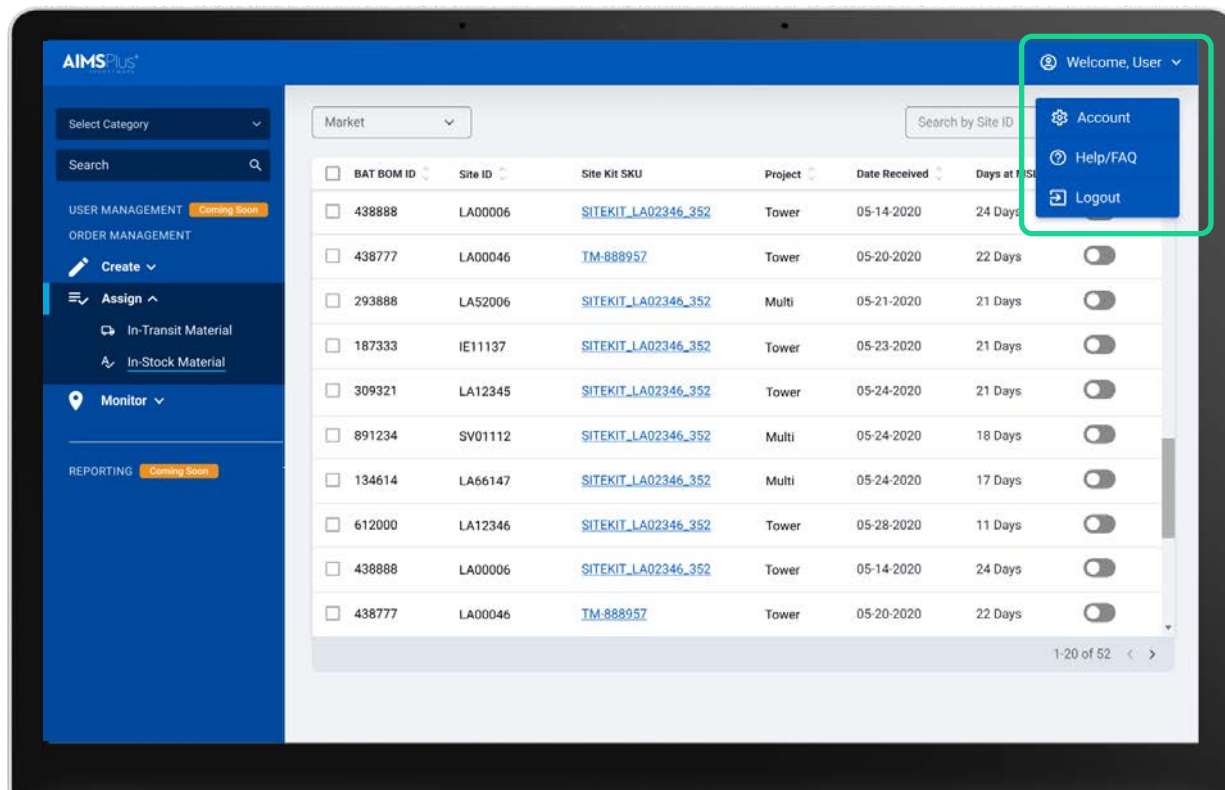
Understanding the Account Homepage

Our Account hompage includes access
to the following:

1. Home menu
2. Profile
3. Password
4. Log Out

Account Information

Understanding Your Profile

The profile page displays information regarding your username, role, name, phone number, email address, and markets. You have the ability to edit the following fields:

1. First Name
2. Last Name
3. Phone Number

Account Information

Changing Your Password

To change your current password edit the following fields:

1. Enter your current password
2. Enter your new password
3. Re-enter your new password for confirmation

*If you have forgotten your password, select the link to reset your password and create a new one.

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Help Center

All accounts have access to the Help Center where users can find published answers, trainings, and training documents, as well as, submit a ticket directly to Tellworks for individual assistance.

Help Center

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L O G I S T I C S

Navigate to the Help Center

Click the menu from any page to drop down quick access to the Help Center and other features.

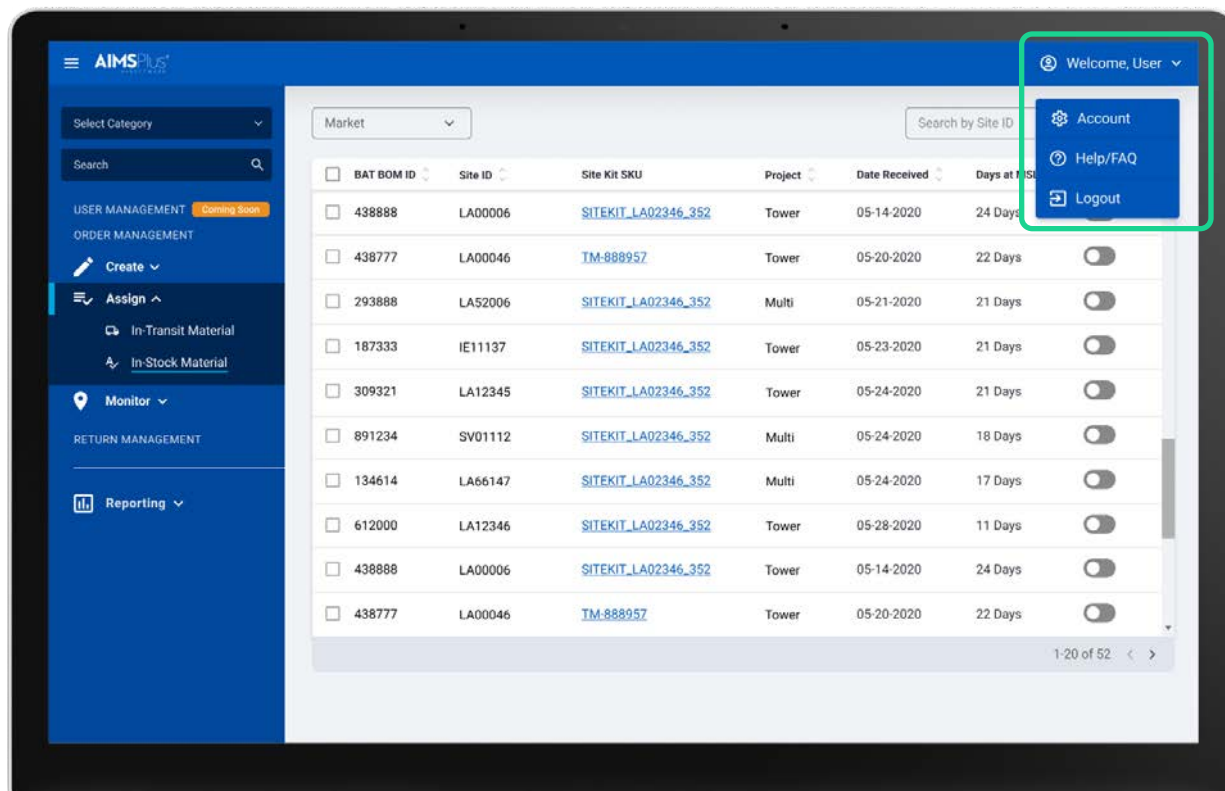*Users can access the Help Center from any page in the app.
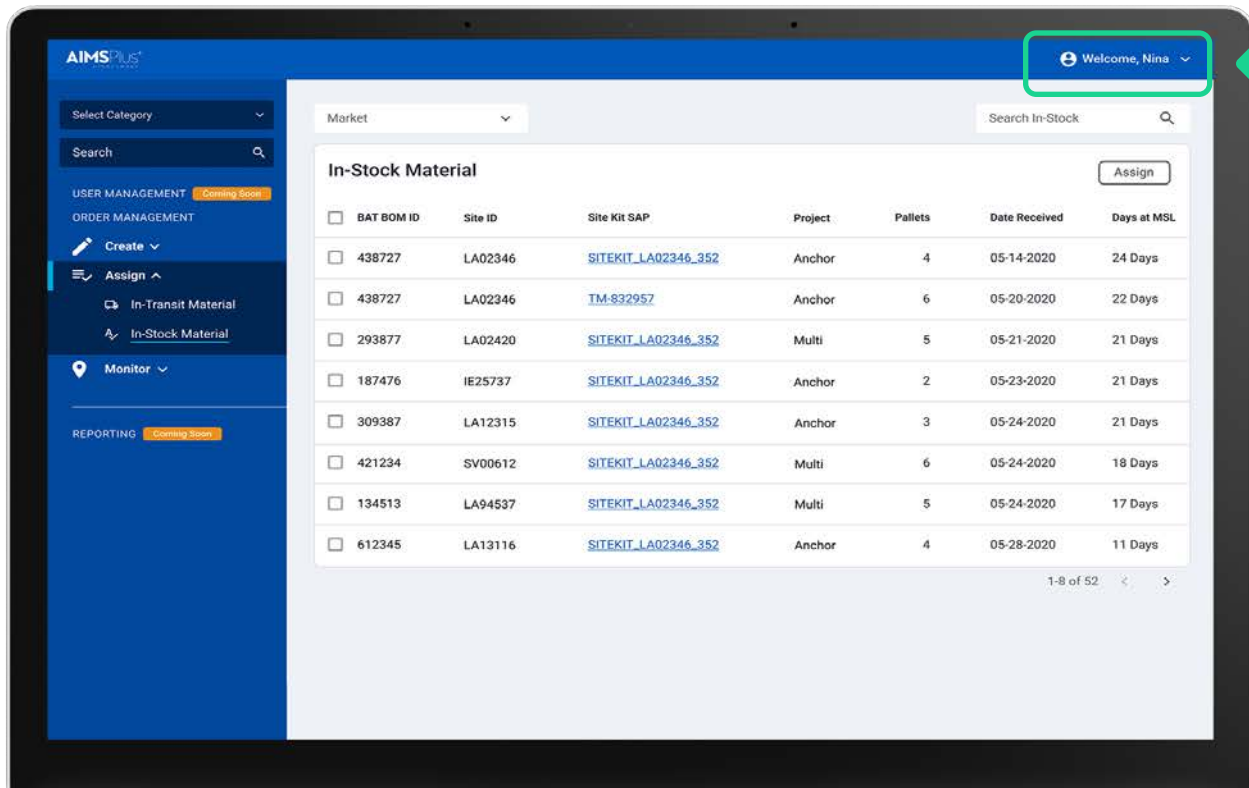
Help Center

Navigate to the Help Center

Menu will appear from the side giving direct acces to the Help Center and Logging out.

Click on 'Help & FAQ' to begin the process.

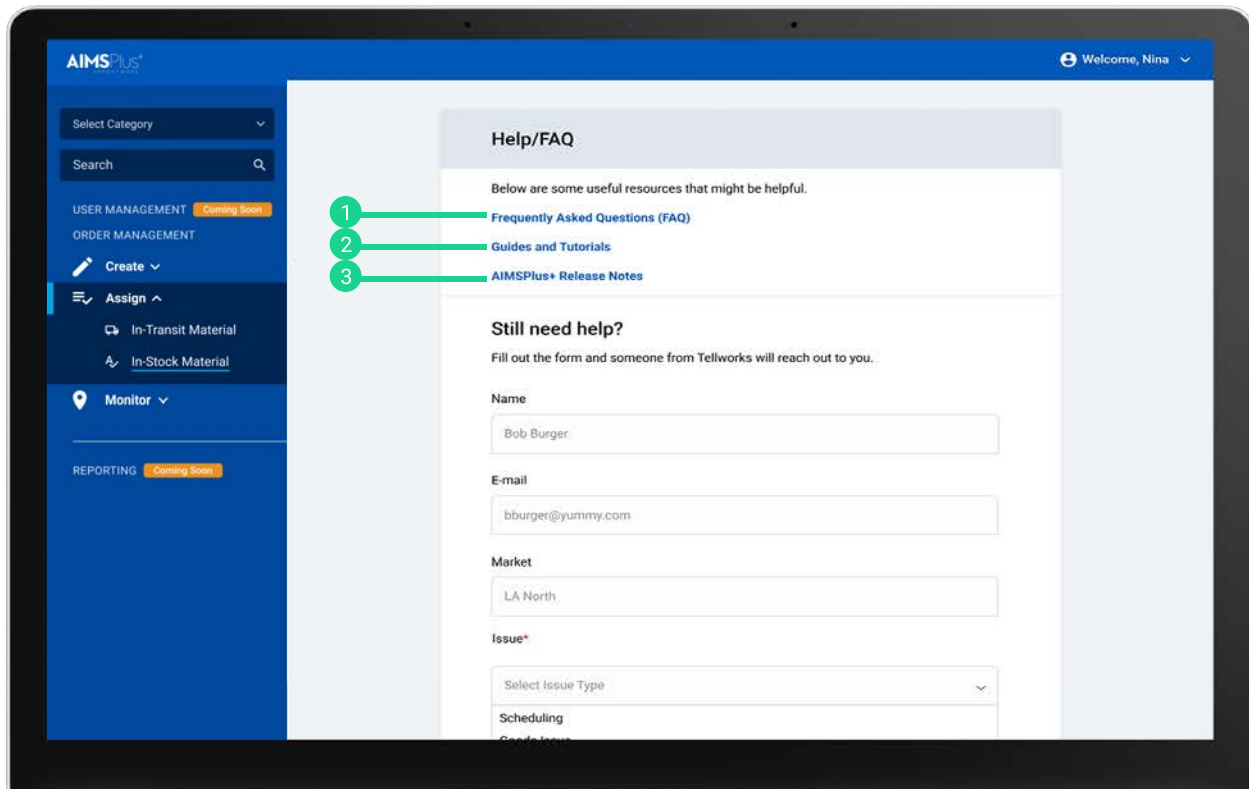*Users can access the Help Center from any page in the app.

Help Center

Our Help Center includes links to:

1. Frequently Asked Questions (FAQ)
2. Guides & Tutorials
3. App release notes

*Additional help can be requested. See next page for details.

Submit a Help Ticket

Submitting an issue automatically generates a ticket in our ticketing system and is the fastest way to get in touch with Tellworks.

1. Account information (Name, Email, & Market) is pre-populated for convenience.
2. Choose an Issue Category
3. Enter issue, feedback, or questions here.