NETWORK BUSINESS SYSTEMS
SOFTWARE SYSTEM DOCUMENTATION

RETURN MERCHANDISE PROCESS

FEATURES
- Automatically assigns RMA number
- Allows for UPS call tag entry
- Multiple scrolling search fields
- Coded notes for analysis
- Unlimited notes
- Automatic acknowledgement printing and update to RMA file
- Completed RMA archiving
- Archived RMA viewing
- Active RMA reporting/viewing
- Automatic Customer Account call up
- Direct Interface with the IBS Receiving System

REPORTS
- Date selectable Open RMA report
- RMA issued, not received report

INTEGRATED WITH:
- Customer account functions
- Retail, Wholesale, and Telemarketing systems
- Inventory systems
- Receiving systems
- Serialized Inventory systems
- Shipping/UPS Manifest systems

SYSTEM OVERVIEW

IBS's RMA module is the platform for tracking any customer returned merchandise or in-house service work provided. Coded services keyed into the RMA provide for detailed analysis that could improve not only customer service but also quality control and vendor rating analysis. Integration throughout the sales system offer on-line tracking of a customer's goods while they are on the phone, without the aggravation of transferring phone calls. The RMA module is an optional sub-module of the customer account system.

The system works by assigning authorization numbers to customers so they can return their merchandise. You will need to instruct them to write the RMA number on the outside of the box. Once received and entered into the RMA system, you have full tracking capabilities until a final disposition is made. The receiving system allows you to receive a RMA that has a part number in the RMA, which creates a receiving ticket that acknowledges that a legitimate RMA has been received. This allows you to use your standard receiving department for this function and eliminate the need to set up a special division for processing RMA's. The receiving date and the receiver's initials are automatically updated by the receiving system if part number exists in the RMA.

You must decide if the merchandise is to be considered your inventory or not. This decision can be recorded in the comments field of the RMA, so that the receiving department can follow these instructions. This program basically operates in four distinct categories.."SETUP", "RECEIVING", "UPDATING", and "CLOSING". This means that separation of duties can be accomplished, which may be used as a means of keeping as many company personnel involved in the overall quality assurance/customer service program as possible (OR AS FEW). The system is interfaced into the sales system, giving your marketing representatives access to the information in any RMA.

You are allowed only one part number per RMA, for tracking purposes and historical analysis.

BASIC SYSTEM OPERATIONAL FLOW
1. **Enter/Edit Active RMA/RAENTER1**....This is where you create and work with all active RMA's. This should be done as the customer is explaining the problem so that you can have the customer write the RMA authorization number on the outside of the shipping container. This also allows you to store accurate information in the system and set up for efficient processing of returned goods. If the goods are returned with no authorization number, then you should create one to provide for complete returned merchandise analysis. Also when the customer is finally associated with the assigned RMA number, you can tell the customer the number for future reference.

2. **Print Acknowledgement Cards/RAACKNOW**....If you choose to provide this service, then you should print these at least weekly if not daily.

3. **Active RMA's Report/RALIST1**....This report should be ran as needed.

4. **Move completed RMA's to Hist./RACOMPLT**....You may want to do this every time you close an RMA, or at least prior to running the active RMA report.

5. **RMA's Received/RAOPEN**....This will report all RMA's both open and closed, received after a user defined date. Run as necessary to follow up.

6. **RMA's Not Received/RAUNREC**....Run this as needed to follow up.

SYSTEM SETUP REQUIREMENTS
The RMA System is designed to use integrated into the IBS Professional Sales Systems. You will be required to have the IBS Inventory, Sales Distribution or Retail Point of Sale, and Customer Account Functions set up.

Also, you will need to set up the beginning RMA number in the IBS "System Setup File:SYSGUT", which is on the second screen.

Finally, you will to do the following:
Enter/Edit Procedure Codes:RACODES

MENU STRUCTURE/PROGRAM DOCUMENTS
2. SALES/CUSTOMER MGMT   MENU #1
      7. RETURN MERCH. PROCESS   MENU #1
            1. Enter/Edit Active RMA:RAENTER1
            2. Enter/Edit Procedure Codes:RACODES
            3. Print Acknowledgement Cards:RAACKNOW
            4. Active RMA's Report:RALIST1
            5. Move completed RMA's To Hist.:RACOMPLT
            6. Review Completed RMA's:RAHIST1
            7. RMA's Received:RAOPEN
            8. RMA's Not Received:RAUNREC
            9. Delete RMA's:RADELETE