

Enter/Edit Active RMA

PROGRAM NAME: RAENTER1

MENU OPTION TITLE: Enter/Edit Active RMA

MAIN MODULE: RETURN MERCHANDISE PROCESSING

HELP KEY ACTIVE: YES

PROGRAM OVERVIEW

This program is used to assign authorization numbers to customers so they can return their merchandise. Once entered into the RMA system, you have full tracking capabilities until a final disposition is made. The receiving system allows you to receive an RMA directly to it. This simply creates a receiving ticket that acknowledges that a legitimate RMA has been received. However, you must enter in a part number for this feature to work. If you do not enter in a valid part number in the RMA, then you will have to enter in the received date and initials directly in this program.

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 can be used 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.

Your customer has to call only one person for this function as well as all other customer service systems.

PROGRAM OPERATION

RMA#: This is the actual unique number assigned to each returned product. You can hit <F7> to automatically assign the next number, or you can use <IFF> to find an existing RMA.

CALL TAG #: The call tag number should be retrieved from your shipping/UPS department, who is issued call tags from United Parcel Service. UPS uses call tags to allow a shipper to recall a parcel from a "ship to", at the shipper's expense!

CUST ID: There must be a valid CUST ID in this field. If the customer has no CUST ID, you must give him/her one. You do this by typing <T> in this field and then hit return. The <T> stands for temporary. This number is a temporary number. The computer will automatically assign this number. Then enter the person's name, street, city, state, and phone. You can <ENTER> past this field to access the {NAME} field to find the customer also.

NAME: If you find the customer using the CUST ID number, this field will be automatically filled in. If you are looking for an existing RMA you may either type in the exact {NAME} to find the customer, or use <IFF>.

CUSTOMER TYPE <W,D,R>: This will pop up when you are using the <T> option to create a customer in the RMA system. You must specify if this is a <W>holesale, <D>ealer, or <R>etail customer. Once you enter an option in it will disappear from the screen. This option, once made, cannot be changed in {RAENTER1}. To change your option, you must go into the master field {CMMMAINT}.

ENTERED BY: Enter your initials. This is a required field.

DATE ENTERED: You must now enter the DATE ENTERED for the RMA. The current date will automatically load. This is the date you gave the customer the RMA number, not the date received.

REASON: Now enter a basic reason for the number being assigned. (repair, replace, refund etc.) This reason comes from the customer.

RECEIVED BY: This will be filled when the merchandise has been received. It can be whomever you want, the receiving clerk, the RMA department, etc. Make it meaningful to you. This field is automatically fed directly from the receiving system if a part number (see below) is used in the RMA.

DATE RECEIVED: Date received by your Company. When this date is entered and the EST COMPLETE DATE, you will be able to print out an acknowledgement card to mail to the customer. Also, this date is automatically filled in when the receiving system is used to update an RMA. This field is automatically fed directly from the receiving system if a part number (see below) is used in the RMA.

PART #: This field is for reference only. There is no interface with the inventory system concerning quantities. You can type in a valid part number and that part description will fill in. You can find the part by using <IFF> also. NOTE: If the PART # is filled when creating an RMA, the receiving department will be able to create a receiving ticket automatically which pulls the part # from the RMA. Also, please note that a part number must be filled in here in order for the receiving system to automatically update the RMA with the date received and the initials.

SERIAL #: This field is for reference only. If the valid part number is entered in the PART field that is a serialized part, then this field will be made available to edit

OTHER PARTS: This field can be used to reference other part numbers in the case of multiple parts returned per RMA.

COMMENT #1:

COMMENT #2: These fields can be used for additional description or information on the RMA.

EST COMPLETE DATE: The person or department that actually processes the RMA can fill this in as soon as possible or enter it in when the merchandise has been received. This field has to be filled to run acknowledgement cards.

ACKNOWLEDGE PRINTED: This field is automatically updated when the acknowledgment cards have been printed.

After you enter in the new RMA information, or have edited any of the fields on the first screen, you can return to the bottom of the screen or hit <F10> any time.

"Press RETURN to continue"

Do you want to see the detail <Y/N>? If you hit <N>, the screen will clear and the cursor will be in the RMA field. If you hit <Y>, you will change screens. You are now in the activity screen RAENTER2. In the case of an RMA already in the system, you may see various codes already entered. In the case of a new RMA, you are ready to add codes for work completed. The options available are <A>dd, <E>dit, <D>elete, <S>ee More, or <Q>uit. You can scroll through the activity by using the <PageUp> and <PageDown> keys.

LINE#: This is the line number of the line you are adding or editing.

PROC: Enter a process code in this field. Only valid process codes can be entered. You can search for a code by using the <IFF> functions.

PROCESS DESCRIPTIONS: The description of the process will be displayed in this area.

STARTED: Enter the date you started this process.

FINISHED: Enter the date you finished this process.

DONE BY: The person performing this repair process should enter their initials here.

PART #: Enter the part number of the item being repaired or replaced

DESCRIPTION: The part description is automatically entered.

When all business is complete, you have the ability to mark the RMA as completed with <F8>. NOTE: You must have the field DATE RECEIVED filled and procedure code(s) entered to close an RMA.

Mark this RMA as being completed?