

RMA & Service Agreements



PowerShift's Return Material Authorizations (RMA) provides the structure, control and visibility to effectively manage the processing of customer returns for credit, exchange, replacement or repair. The RMA system can be tuned to reflect your company's policies and to determine if and when credits are issued, if and when replacement items are shipped and whether the customer is obliged to first return the item. RMA processing can affect the disposition of the returned item. A repair manufacturing order can be created upon receipt of the returned goods — and you decide whether or not to charge for the repair. Working together, the RMA and the service agreement tracking programs, manage the fulfillment of repairs against product warranties. Service agreements can be issued as part of the original invoice process or sold at a later date. In make-to-order environments, "as built" configurations can be retained to allow for subsequent replacement of components.

- Enter RMAs directly or inquire by control number to find all the relevant information on a previously shipped item and automatically create the required RMA.
- RMA defaults are selected at the system level; they can be overridden for specific RMAs:
 - Choose if a replacement is sent immediately
 - Choose if a repair manufacturing order is created upon receipt of the returned item
 - Choose when to generate a credit memo for the item being returned
 - Optionally allow the end user to return the warranty item to streamline the return process in a distributor network
 - Repairs can be charged as part of the debit memo generated upon return of the unit
- Determine when credit memo is issued.
- Determine when debit memo is issued.
- Determine if a manufacturing repair order will be created upon return of item.
- After line entry press the "Quick memo" button to generate credit or debit demos.

RMA Header

CA-1	VG3	SP1	RMA1	RMA Maintenance
Order number	CA-100001256			Bill-to: Preston Furnishings 357 Bristol Court Bayberry, CA, 35789-1258, US Gregory Preston, (625) 369-1257
Customer number	12			Ship-to: Preston Furnishings 357 Bristol Court Bayberry, CA, 35789-1258, US Gregory Preston, (625) 369-1257
Order	New RMA			
Return	RMA			
Ship-to				
Cust PO number	RETURN 3456			Special instr
Date wanted	06/30/2011			Priority
Date ordered	06/30/2011			Dept number
Sales branch	CA-1	ABC COMPANY		Revenue org cd
Ship branch	REPL	REFURBISHED STOCK		Price code
Ship partial?	<input type="checkbox"/>			AR terms
FOB	ORI	Origin		Tax code
Freight terms	TPB	3RD PARTY BILL		Resale lic 1
Ship via	UPB	UPS 2-day		Resale lic 2
Ship via account				Dest customer
Sales rep 1	10-WC10	Parsons, Joanna		Contact
Split 1	60	Sls region 10WC		
Cust serv rep	RCE	Randy Eding		Entered
Gross disc %	.00	CM branch REPL		RCE 06/30/2011 06:22:42
Accrued disc %	.00	DM branch REPL		
Misc disc %	.00			Order gross 11.23 US
Memo reason				Volume .0000
Internal document?	<input type="checkbox"/>			Deposit .00
				Weight .0000

RMA Line

1	VG3	SP1	RMA2	RMA Maintenance
Order number	CA-100001256			12 - Preston Furnishings
Line number	1			
Item number	1			Current
Return qty	1			ECL A
Selling price	11.23000			Routing rev lvl A
Sales UOM	EA			Discount % .00
Description	Nut, wire, number 6 *			-Quantities-
Date entered	06/30/2011			Original return 1
Date wanted	06/30/2011			Repair supply 0
Date promised	07/01/2011	Line priority	<input type="checkbox"/>	Returned 0
Sched return	06/30/2011			Total credit qty 0
Adj promise dt		Adj promise rsn		Credited 0
Reason for chg		Non-commission?	<input checked="" type="checkbox"/>	Replacement qty 0
Drop ship?	<input type="checkbox"/>	Kitted item?	<input type="checkbox"/>	Unreturned value 11.23
		Split lot?	<input type="checkbox"/>	
Replace item				
Credit qty	0	Force repair?	<input checked="" type="checkbox"/>	
Next CM qty	0			
Credited	0			
Replace qty	0			
Next DM qty	1			
Replaced	0			

Standard Reports, Inquiries and Maintenance Programs

- Control Number Inquiry
- RMA Inquiry
- RMA Line Inquiry
- RMA Listing
- RMA Maintenance
- RMA Mass Close
- Service Agreement Tracking Codes
- Service Agreement Duration Codes
- Service Agreement Tracking Inquiry
- Service Agreement Tracking Maintenance

Document Management System

Output copies of these documents:

- RMA Acknowledgment
- RMA Packing Slip
- RMA Receiver
- Rework Manufacturing Order
- Debit Memo
- Credit Memo

Sales/Shipping Interface

- Optionally save the “as built” configuration of the shipped item.
- Call up the original item’s “as built” configuration and simply select the items to be replaced to add them to the RMA.
- If you replace the originally shipped serial number with a replacement item, the original warranty will be granted to the newly shipped item. If the item is also covered by a service agreement, the serial number is updated there as well.
- During invoice processing, warranty expiration and maximum warranty expiration dates are calculated based on the date of original shipment.
- For serially-controlled items, expiration dates are displayed in the Control Number Inquiry (SNQ), along with the complete stocking history of the item. If a service agreement has been created for the item, the service agreement number and expiration date are displayed.

Warranty Fields Maintained by Item

- *Warranty tracked?* determines if the item is covered by a warranty.
- *Warranty duration* is the number of days of warranty coverage from the date of original shipment.
- *Maximum warranty duration* is the maximum number of days a service contract can be created for from the date of original shipment.

Service Agreements

- Track “as built” configurations
- Include as part of the original sale or sell later for as basis of additional revenue
- Generate based on items associated with a sales invoice or on a control number basis
- Provide current information on item status and RMA activity
- Replacement and original control numbers tracked
- Establish preset service contract periods
- Establish replacement policy (i.e., immediately replace, replace after receipt of return, or repair)