



## Questions for RMAs

### Exercise 1: Ship Only

#### Step 1: Create RMA

1. Go to 'RMA' screen > add new > add place ID (customer place) > description
2. Create a new line
3. Set return reason = Ship Only > add item to receive > receive to place > quantity
4. Save (a part need will be created)

#### Step 2: Shipping unit

5. Print pick the part need (you must have good units in stock)

#### **Tips:**

Click 'stock lookup' in part need to see if you have stocks. If not, you can receive by going to logistic manager > miscellaneous adjustments > receive.

6. Go to shipment from part need line > select unit > post shipment
7. RMA will get completed.

### Exercise 2: Receive Only

#### Step 1: Create RMA

1. Go to 'RMA' screen > add new > add place ID (customer place) > description
2. Create a new line
3. Set return reason = receive only > add item to receive > receive to place > quantity
4. Save

#### Step 2: Receive faulty unit

5. Copy RMA > go to receiving screen > enter RMA ID, receive to place > save
6. Add unit > Enter new serial > save
7. RMA will be completed.



## Exercise 3: Advance Replacement

### Step 1: Create RMA

1. Go to 'RMA' screen > add new > add place ID (customer place) > description
2. Create a new line
3. Set return reason = advance replacement > add item to receive > receive to place > quantity
4. Save
5. A new part need will be created.

### Step 2: Send good unit

6. Repeat steps in 'step 2' on exercise 1.
7. RMA will still stay open.

### Step 3: Receive Faulty unit

8. Repeat steps in 'step 2' on exercise 2.
9. RMA will be completed.

## Exercise 4: Repair and return (in house repair)

### Step 1: Create RMA

1. Go to 'RMA' screen > add new > add place ID (customer place) > description
2. Create a new line
3. Set return reason = repair and return > add item to receive > receive to place > quantity
4. Save

### Step 2: Receive faulty

5. Repeat steps in 'step 2' on exercise 2.

### Step 3: Repair center process

6. Go to 'repair center' screen > search from RMA ID

**Tips:**

When you receive faulty unit it will create a repair tag. A repair task will also be created which will need to be completed, but it has no dependency to complete RMA unless you configure.

7. Click header menu > Click 'transfer unit' and transfer to usable
8. Check 'ready to ship' > check 'pick complete' > save
9. Not a part need will be created.

Step 4: send good unit to customer

10. Go to RMA > complete steps in 'step 2' in exercise 1.
11. RMA will be completed.

**Tips:**

Serial will be removed from system once it is sent to customer.

## Exercise 5: Repair and return (Send to external repair)

Step 1: Create RMA

1. Go to 'RMA' screen > add new > add place ID (customer place) > description
2. Create a new line
3. Set return reason = repair and return > add item to receive > receive to place > quantity
4. Save

Step 2: Receive faulty

5. Repeat steps in 'step 2' on exercise 2.

Step 3: Repair center process

6. Go to 'repair center' screen > search from RMA ID
7. In repair center header menus select 'RTV' (repair transfer vendor)
8. In the pop up add place id to an ASP

**Tips:**

- You can select a ASP (authorize repair center) from place screen > whose place = ASP
- You can also select if the repaired product should be sent directly to customer by 'drop ship' options.

9. You will get a part need created to ship to ASP

**Step 4: Ship to ASP**

10. Print pick > create shipment > post shipment
11. You will get a purchase order created.

**Step 5: receive good units to repair place**

12. Go to PO > approve PO > post PO
13. Receive PO

**Step 6: Ship unit to customer**

14. Repeat steps in 'step 4' in exercise 4.
15. RMA will be completed.

**Exercise 6: Repair and return (Send to another warehouse)****Step 1: Create RMA**

1. Go to 'RMA' screen > add new > add place ID (customer place) > description
2. Create a new line
3. Set return reason = repair and return > add item to receive > receive to place > quantity
4. Save

**Step 2: Receive faulty**

5. Repeat steps in 'step 2' on exercise 2.

**Step 3: Repair center process**

6. Go to 'repair center' screen > search from RMA ID
7. In repair center header menus select 'RTV' (repair transfer vendor)
8. In the pop up add place id to another warehouse



9. Then select drop ship as either 'drop ship to customer' if you want to send good unit back to customer or 'drop ship send back to stock' if you want to keep in stock

#### Step 4. Ship to warehouse

10. Print pick > create shipment > post shipment

#### Step 5: receive good units to repair place

11. Select transfer unit in repair center > transfer to usable> tick ready to ship
12. A new part need will be created to receive good stock back to repair center
13. Print pick > process shipment

#### Step 6: Ship unit to customer

14. Once above shipment posted the next steps will be determined by your earlier 'drop ship' selection in step 3- 9
15. If you selected drop ship to customer, then at this point you will get another part need created to ship units to customer. Process that part need to send unit back to customer and your RMA will be completed

## Exercise 7: Repair and replace

#### Step 1: Create RMA

1. Go to 'RMA' screen > add new > add place ID (customer place) > description
2. Create a new line
3. Set return reason = repair and replace > add item to receive > receive to place > quantity
4. Save

#### Step 2: Receive faulty

5. Repeat steps in 'step 2' on exercise 2.

#### Step 3: Repair center process

6. Go to 'repair center' screen > search from RMA ID
7. Click header menu > Click 'transfer unit' and transfer to usable
8. Check 'ready to ship' > check 'pick complete' > save
9. Note a part need will be created.

#### Step 4: send good unit to customer



10. Go to RMA > print pick part need
11. go to shipment > enter unit> select a serial from existing stock (since this is a replace you have to select a different serial)
12. post shipment and RMA will be completed