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Knowledge Base

Guides > Setup and User Guides > Setup for RMAs and Returns

Guides > Setup and User Guides > Setting up Your Site to Process RMAs and Returns

Search

Tools

Comment

Article

Related Content (6)

Related Conversations (0)

RMAs and Returns

Website Settings

Master Pages

Preventing Certain Returns

Product-Level Settings

RMA Shipping Settings

Shipping Box Settings

Configuring Emails

Setting up Your Site to Process RMAs and Returns

The Aptos platform provides for management of returns. Return Merchandise Authorizations (RMAs) can be requested by your customers on your site and they can also be created in the Site Manager by your Customer Service Representatives.

Settings for RMAs and Returns

This article guides you through all the settings necessary to enable processing of RMAs and returns on your site.

Website Settings

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Once these settings are configured, RMAs can be created by your customers and your Customer Service Representatives (CSRs). Returns can then be processed using the Site Manager.

Users > Website Settings

Website Settings

Site Manager Pages

Users > Website Settings > Site Layout > Website Settings

Users > Website Settings > General > Aptos Server Settings > RMA Type

Knowledgebase article #2111: [Click here](#) to learn more about website settings.

You can customize how you want to process returns. If you want to allow your customers to be able to request returns (RMAs) on your site, you must first enable the settings at **Users > Website Settings > Site Layout > Website Settings** in the administration area of the Site Manager. [Learn more](#) about RMA Website Settings.

Customer Generated RMAs

- **Allow RMA (item returns):** Mark the checkbox "Yes" to allow your customers to request RMAs in the Members Area on your site. Then, set the allowable duration.
- **Allow RMA to generate shipping label.** If you want the creation of RMAs to generate a shipping label, enable this setting. By default, this setting is disabled.
- **RMA Allowable Duration:** First, enable the "Allow RMA" function described above and then set the number of days from purchase in which returns will be accepted.

Display configured Featured Products on Standard Pages: ☒ Yes

Allow RMA (item returns): ☒ Yes

Allow RMA to generate shipping label: ☒ Yes

Allowable Days for RMA: 90

Allow Item Cancellations: ☐ Yes

## Return Shipping Labels

Before you can generate return shipping labels on your site, the **Users > Website Settings > General > Aptos Server Settings > RMA Type** must be set to Normal, not EDI. This setting is usually set by Aptos. If you feel uncertain about changing this setting, contact client services.

Connection String:

Product SubDirectory:

RMA Type: Normal

Mobile Site Enabled: ☐

## Content > Pages > Masters

### Master Pages

#### Site Manager Pages

Content > Pages > Masters > Member > Area

Certain master pages at **Content > Pages > Masters > Member Area** are configurable so that you can customize the RMA instructions for your site. Master pages you may want to customize include:

- **Member Default RMA Instructions Text**
- **Member Default RMA Instructions Title**
- **RMA Not Allowed** - If a customer is not allowed to RMA for a certain return type, you can edit the text in this master. This text will appear in the pop-up window indicating the reason why the customer can't generate an RMA for this type of return reason.

## CRM > Communications > Listings

### Preventing Certain Online Returns

#### Site Manager Page

CRM > Communications > Listings > Return Types

Knowledgebase Article #1208: [Click here to learn more.](#)

For some return reasons, you may want to require that customers call to coordinate a return rather than allowing the customer to generate an RMA via your website. Because of this, the platform allows you to control which return reasons are applicable to online RMA generation based on the return reason selected by a customer. Therefore, when a customer selects one of these return reasons, they won't be allowed to submit an RMA via your site. These RMA features are set up in the Site Manager at **CRM > Communications > Listings > Return Types**. [Click here](#) to learn more.

You can edit the text that will appear in a pop-up window indicating the reason why the customer can't generate an RMA for this type of return. As explained earlier, this text is edited at **Content > Pages > Masters > Member Area**.

You can also edit the emails for each return reason. For example, if a customer indicates they are returning the merchandise because it does not fit, you can have a customized email sent for this reason code. Email are configured at **Content > Pages > Emails > Order Management**. Email management is explained in detail later in this article. [Click here](#) to learn more about email masters.

**Note:** While you may create many Return Types, you must enable the Return Types for which you want to generate a shipping label.

## Content > Products

### Product-Level RMA Settings

#### Site Manager Pages

Content > Products > Add/Edit

Content > Import/Export > Product Import

Content > Import/Export > Products with Options

**Knowledgebase Article #1069:** [Click here to learn more](#) about adding and editing products in the Site Manager.

By default, all products are returnable. However, you can control whether or not you want certain products to be returnable with the setting Can RMA at **Content > Products > Add/Edit > Details > General > Options**.

The screenshot shows the 'Options' tab in the Site Manager. The 'Can RMA' checkbox is checked and highlighted with a red box. Other options include Digital Good, Disallow Gift Wrapping, Display on Mobile, Editor's Choice, Exclude From Google Checkout, Free Shipping, Local Sales Only, Made with recycled material, One Per Household, Requires Activation, Return Protection, and Tax Exempt.

These settings can also be controlled when importing a spreadsheet at **Content > Import/Export > Product Import** or **Content > Import/Export > Products with Options**, depending upon which one is applicable.

## Commerce > Shipping > Settings

### RMA Shipping Settings

#### Site Manager Page

Commerce > Shipping > Settings > Express Shipping Carrier Settings

The Aptos platform has a pre-set default for RMA shipping service types. If your company supplies return labels for your customers, make certain the appropriate shipping and label options are set. These are set at **Commerce > Shipping > Settings > Express Shipping Carrier Settings**.

You can elect to choose a different carrier for RMAs if you use USPS shipping rates and labels as the default on your site. In the drop-down menu, select the carrier you want to use for RMAs. Then select the RMA service you want to use. Save the setting at the bottom of the page. Then, re-select the USPS Express Shipping Carrier and re-click the save button. While not displayed on the screen, the RMA service will be set.

**Note:** This feature enables you to email a generated shipping label for your customers requesting a return. This functionality utilizes Aptos's Pick, Pack & Ship service to generate the labels. You will need credentials for the shipping carriers with which you want to use this service.

**Warning:** If you use USPS shipping, do not change the pre-set box sizes that appear on this page. These values directly interact with USPS and are in the format requested by USPS.

In addition, if your company is already certified with USPS and UPS to generate labels, there is no need for further certification. However, FedEx requires additional certification for the creation of return shipping labels.

## CRM &gt; Communications &gt; Listings

## Shipping Box Settings

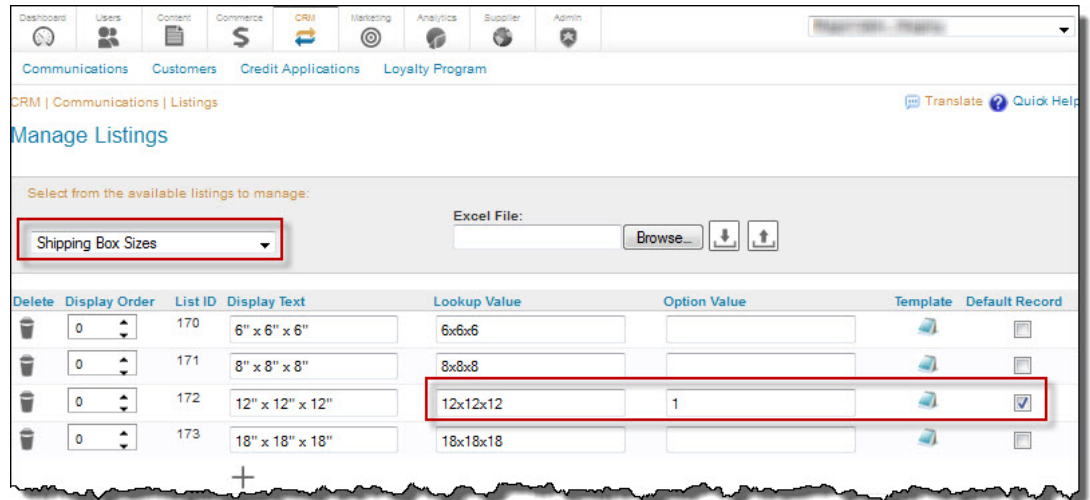
**Site Manager Page**

CRM &gt; Communications &gt; Listings

**Knowledgebase Article #1208:** [Click here to learn more.](#)

For return labels to be generated, there must be one shipping box size set and a weight set as the default records at **CRM > Communications > Listings**.

- **Lookup Value:** Default is set to 12x12x12.
- **Option Value:** Default is 1. (Indicates 1 lb.)
- **Default Record:** The default record must be enabled.



Delete	Display Order	List ID	Display Text	Lookup Value	Option Value	Template	Default Record
	0	170	6" x 6" x 6"	6x6x6			<input type="checkbox"/>
	0	171	8" x 8" x 8"	8x8x8			<input type="checkbox"/>
	0	172	12" x 12" x 12"	12x12x12	1		<input checked="" type="checkbox"/>
	0	173	18" x 18" x 18"	18x18x18			<input type="checkbox"/>

## Content &gt; Pages &gt; Emails

## CRM &gt; Communications &gt; Listings

## Configuring Emails

**Site Manager Pages**

Content &gt; Pages &gt; Emails

CRM &gt; Communications &gt; Listings

**Knowledgebase Article #1173, #1909 & #1208:** Learn about [editing emails](#). Learn more about [email masters](#). Learn more about [customized emails for Return Types](#).

The email templates for each return type reason are set up and managed so that you can restrict control over who can modify the text in the email. Emails can be configured at **Content > Pages > Emails** or at **CRM > Communications > Listings**, depending upon the type of return requested. Depending upon your site's configuration, once an RMA has been generated it will be emailed to the customer who requested the RMA as well as to your site administrator's email address.

**Default Emails**

Set up default emails at **Content > Pages > Emails > Order Management**. Some of the emails you may want to configure are:

- Returned Request
- Returned Item Pending Inspection
- Return Request Email After 30 Days
- Order Credit

**Customized Emails**

You can set up customized emails for each return type or shipping box size at **CRM > Communications > Listings**. You can edit email templates directly within each Return Type you define. This gives you more

flexibility to create emails specific for each return reason. For example, if a customer indicates they are returning merchandise because it does not fit, you can send them a customized email sent indicating this reason. Any email template that is customized for a specific return type will override the default email for Return Types.

You can also edit email templates directly within each Shipping Box Size you define. This gives you more flexibility to create emails specific for each shipping type.

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## Create an RMA

**Site Manager Page**  
Commerce > Orders > View > Options > RMA Request  
**Knowledgebase Article #1138:** [Click here to learn more.](#)

Once you have set up your site to properly handle RMAs and returns, go to **Commerce > Orders > View > Options > RMA Request** to create an RMA.

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## Processing Returns

**Site Manager Page**  
Commerce > Orders > Returns  
**Knowledgebase Article #1125:** [Click here to learn more.](#)

Returns can be processed both with and without RMAs. To process returns, go to **Commerce > Orders > Returns**.

### Related Content

Commerce > Orders > Returns
Content > Pages > Emails
Guides > Setup and User Guides > Email Masters Guide and Token Definitions
Guides > Partner Integrations
CRM > Communications > Listings
Content > Products > Add/Edit