

Return Material Authorizations and Repair Tracking

For Sage 300 ERP (Accpac)



Updated for v2014

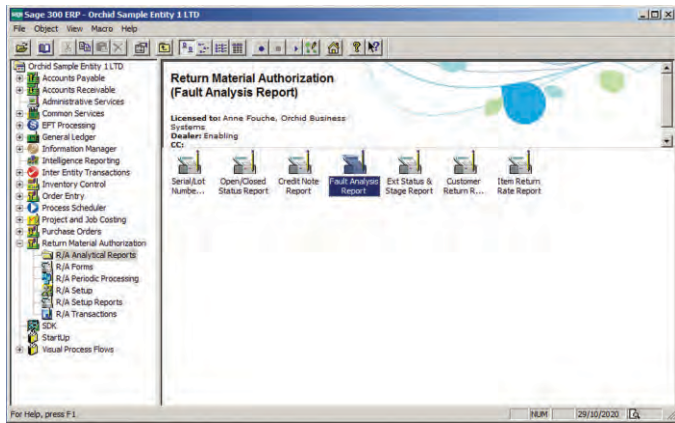


Improved customer service
More accurate inventory and financial records
Providing you with a traceable single point of information

What is RMA & RT?

Return Material Authorizations & Repair Tracking automates and simplifies the management of product returns and repair tracking as part of your Sage 300 ERP (Accpac) system. It uses flexible workflow to speed up the processing of returns, creating the cross-referenced entries required to ensure your inventory and financial records are updated and correct.

This includes replacement and/or repair and sustains Quality Assurance procedures for fault and warranty tracking and to facilitate corrective action if required.



The result is faster turnaround times whilst providing superior customer service and appropriate control. This ensures the customer is informed about every step of the process and can be confident that you are actively working to resolve the issue. No longer are return records kept in separate files, spreadsheets or sheets of paper on team members' desks, you can have a single point of information.

A Sage branded OEM product for Sage 300 ERP, developed by Orchid Systems, the Return Material Authorizations (RMA) module has been assisting Sage 300 ERP (Accpac) users to manage their returns, evolving with each release since 1999.

The Benefits

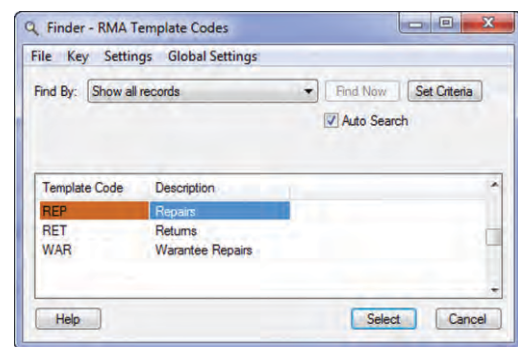
- Improved customer satisfaction.
- Rapid turnaround times.
- Increased accuracy of inventory.
- Ensure cost recovery and minimise losses by accurately tracking and billing repairs.
- Improved cash flow and stock turnover via efficient system with quality focus and fewer write-offs.
- Help reduce cost of returns and handling process.
- Uphold quality by early reporting and identification of product problems.
- Time saved - no need to re-key and check information, less chance of error.

With increased competition and lower margins, and the service expectations of personal and web based customers, an integrated and automated system to manage repairs and returns becomes a "must have."

RMA & RT Features

OPERATION

- Simple and fast repair tracking and billing.
- Automatic allocation and tracking of RMA ID numbers.
- Status tracking based on user definable status and workflow stage codes.
- Email a range of RMA instructions to customers.
- Define an RMA Customer email address (different from AR Customer e-mail or contact e-mail).
- Customised Setup
 - Templates to speed up data entry and validation defined at a customer level or system wide.
 - Email templates to speed up data entry.
 - Item return policies.
 - Specify employees authorized to approve RMAs.
 - No need to be Sage 300 ERP users.
- Multicurrency support.
- Automatically calculates Restocking Fees.
- New "Entered By" field recorded on RMA transactions.



DOCUMENTATION/PROCESSES AUTOMATED

- A framework to support your Returns processing.
- Optional automatic creation of RMA from original customer invoice.
- Creation of customer credit note in Order Entry and return to inventory.
- Duplicate Credit Note checking.
- Duplicate customer RMA checking.
- Create sales order in Order Entry to replace returned goods.
- Inventory return to vendor in Purchase Orders.
- Include multiple customer invoices on one RMA.
- For distributors, record the ultimate end user of the product. being returned for analysis purposes.
- Shipping documentation.
- Return Instruction Form detailing return procedures to be performed by customer.



Return Material Authorizations and Repair Tracking

For Sage 300 ERP (Accpac)

www.orchidsystems.biz

No more lost returns or angry customers
Easy to use feature-rich framework to support your return process
Providing you with efficient and tight control

RMA & RT Features

TRACKING AND ANALYSIS

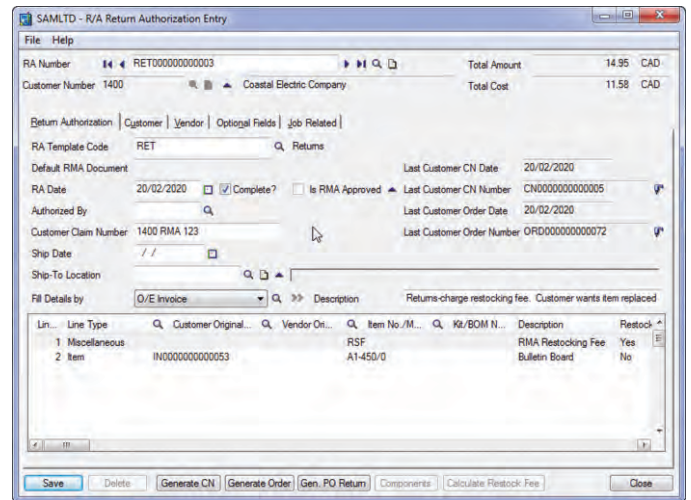
- Track claims for cost recovery, e.g. cost of inventory damaged in transit by a third party shipping company.
- Fault type tracking.
- Vendor warranty tracking.
- 3rd Party Repair Agent tracking.
- Reports and inquiries to view current status of returns.
- Optional fields at Header item or Miscellaneous Charge level for configurable tracking.

SYSTEM

- Developed in the Sage 300 ERP SDK providing its standard look & feel, security, customization capabilities, data integrity checking, report using Crystal Reports® and more!
- Seamless integration with Sage 300 ERP's IC, AR, OE, PO, and Project & Job Costing, Lot Tracking & Serialized Inventory, and Transactional Analysis & Optional Field modules.
- Supports Sage 300 ERP Kitting and BOM functionality.
- Deploy in Client Server or Web Browser modes.
- No redundancy or duplication of data.
- Compatible with all editions of Sage 300 ERP
- Runs on all databases supported by Sage 300 ERP.
- Optional fields at Header item or Miscellaneous Charge level for configurable tracking.

"Returns can now be processed in one third the time with less stock shrinkage and better tracking of returned items....."

RMA end user



"....Customers are benefiting from more efficient internal processes... It's a win-win situation."

RMA end user, supported by Unisoft, Vancouver, BC Canada

15/01/2012 5:18:23PM Sample Company Limited Page 1

RMA Analysis by Customer Report - Detail (RACUS1RD)

From Customer: to 222222222222

From Date: 1/01/2020 to 20/02/2020

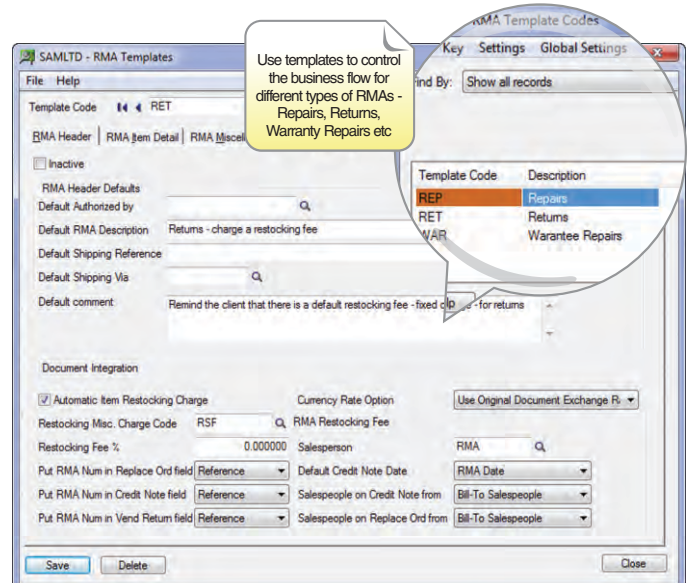
Customer Number	Customer Name	Item Number	Item Description	Quantity	Sales (Cust. Curr.) Amount	Returns (Cust. Curr.) Quantity	Returns (Cust. Curr.) Amount
1200	Mr. Ronald Black	A1-103/0	Fluorescent Desk Lamp	10	599.90	3	179.97
		A1-320/0	50W/12V Halogen Bulb	7	44.73	2	12.78
Total for Customer: Mr. Ronald Black				17	644.63	5	192.75
1400	Coastal Electric Company	A1-450/0	Bulletin Board	25	623.75	1	24.95
Total for Customer: Coastal Electric Company				25	623.75	1	24.95
1500	Custom Comfort	A1-320/0	50W/12V Halogen Bulb	0	0.00	2	12.78
Total for Customer: Custom Comfort				0	0.00	2	12.78
Grand Total:				42		8	
Returns as a % of sales:							19.85%

Minimum Requirements

Return Material Authorizations and Repair Tracking 2014 requires Sage 300 ERP 2014 System Manager, Inventory Control, Order Entry and Accounts Receivable. In addition, Sage 300 ERP modules Purchase Order and Project and Job Costing are required to use the vendor returns functionality and to track returns to a project, respectively.

Further details from your Sage Software Solution Provider.

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Suite 2 / 273 Alfred Street, North Sydney, NSW, Australia, 2060
+61-2-9925-0383 / Fx +61-2-9955-3926 / info@orchidsystems.biz

