

Return Material Authorizations

For Sage 300 (Accpac)



Development
Partner Endorsed
Development
Partner Gold



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

WHAT IS RMA

Return Material Authorizations (RMA), from Orchid Systems, streamlines the management of product returns and repairs from within your Sage 300 system. Flexible workflows allow you to authorize customer returns, initiate replacement orders, issue credit notes, and return faulty goods to the vendor.

Once the return episode has been completed, cross-referenced accounting entries are generated in Sage 300 (PO, OE and IC), ensuring that your inventory and financial records are kept up to date.

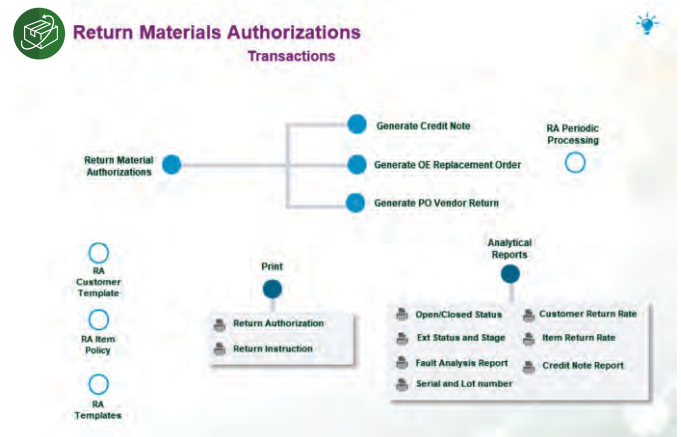
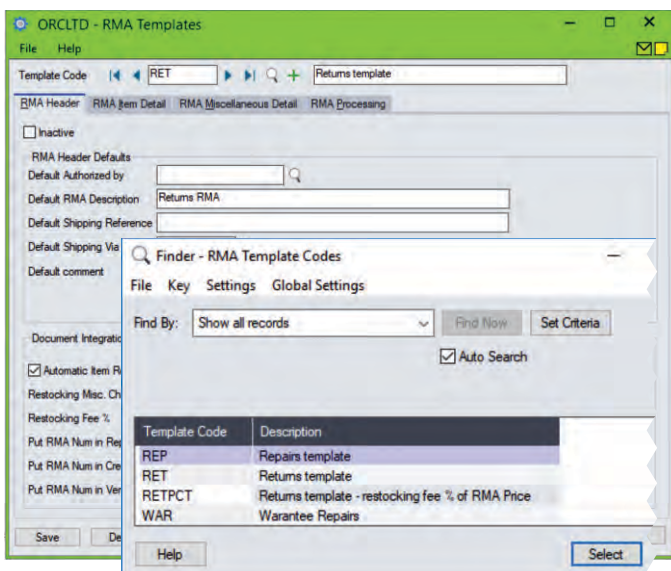
All information is stored within Sage 300. No more standalone databases, spreadsheets, or handwritten notes. Full visibility of status and location are maintained from end to end, so your customers can be kept fully informed of progress. Analytical reports provide early warning of product quality issues, allowing you to take corrective action.

Orchid's RMA module has been helping Sage 300 (Accpac) users manage their returns since 1999, evolving with each subsequent release.

FEATURES

OPERATION

- 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 or contact email).
- Customised Setup
 - Templates to speed up data entry and validation. Defined at customer level, or system wide.
 - Email templates save time and provide consistent customer service.
 - Item return policies to enforce return rules at item level.
 - Specify employees authorized to approve RMAs. They need not be Sage 300 users.
- Multicurrency support.
- Automatically calculates Restocking Fees.
- "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 consumer of the product being returned for analysis purposes.
- Shipping documentation.
- Return Instruction Form detailing return procedures to be performed by customer.

"Customers benefit from up-to-date status tracking, while we improve profitability. It's a win-win"

RMA END USER, SUPPORTED BY UNISOFT, VANCOUVER, BC CANADA



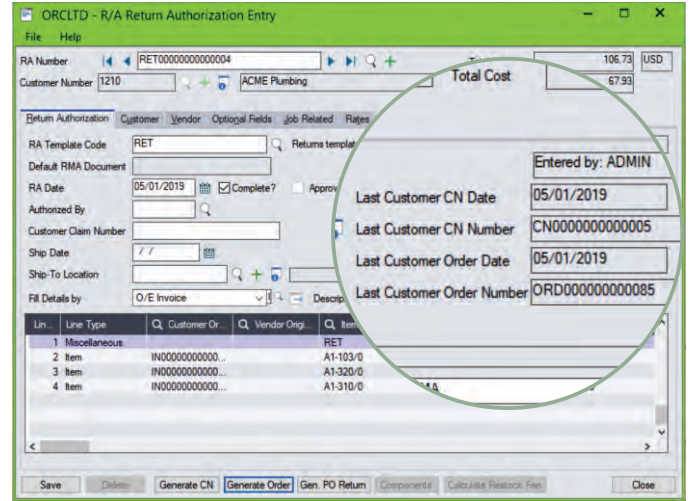
MORE FEATURES

TRACKING AND ANALYSIS

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

INTEGRATION

- Seamless integration with Sage 300's IC, AR, OE, PO, Project & Job Costing, Serialized Inventory & Lot Tracking, Transactional Analysis & Optional Field modules.
- Supports customer, vendor and item number change.
- Supports Sage 300 Kitting and BOM functionality.



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

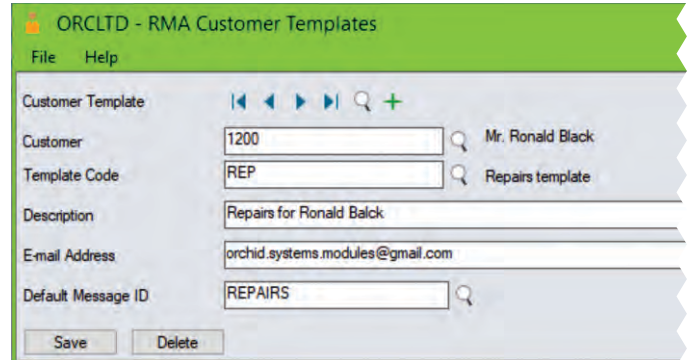
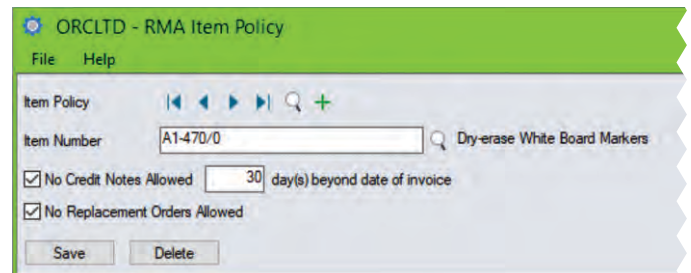
RMA END USER

Customer Number	Customer Name	Item Number	Item Description	Quantity	(Cust. Curr.) Amount	Quantity	(Cust. Curr.) Amount
1200 Mr. Ronald Black							
A1-1030			Fluorescent Desk Lamp	58	3,369.44	3	179.97
A1-3100			Halogen Desk Light	0	0.00	5	251.75
A1-3200			50W/12V Halogen Bulb	0	0.00	3	19.17
A1-4000			Desk Note Book	0	0.00	1	24.95
A1-4500			Bulletin Board	0	0.00	1	17.70
A2(IMAGE-1500)G			Image 1500 Series Desk Accessories	0	0.00	1	141.12
F2-1050L			Plastic Drawer Labels	0	0.00	0	0.00
Total for Customer: Mr. Ronald Black				58	3,369.44	14	634.66
1210 ACME Plumbing							
A1-1030			Fluorescent Desk Lamp	0	0.00	3	179.97
A1-3100			Halogen Desk Light	0	0.00	3	151.05
A1-3200			50W/12V Halogen Bulb	0	0.00	3	19.17
Total for Customer: ACME Plumbing				0	0.00	9	350.19
Grand Total:				58		23	
Returns as a % of sales:						41.07%	

Analytical reports, including Return Rate as % of sales

BENEFITS

- Faster turnaround, happier customers.
- More efficient processes lead to reduced costs.
- Reduced stock losses through more accurate inventory control.
- Quick and easy repair tracking and billing.
- Maximise cost recovery by correctly charging for repairs.
- Greater focus on product quality means reduced stock write-offs.
- No more duplication, re-keying and checking. Saves time, reduces errors.
- Developed in the Sage 300 SDK, resulting in standard look & feel, security, customization capabilities, data integrity checking, and more.



Define Item Policies and Customer Templates for returns

MINIMUM REQUIREMENTS

Return Material Authorizations 2020 requires Sage 300 2020 System Manager, Inventory Control, Order Entry and Accounts Receivable. In addition, vendor returns functionality requires Sage 300 Purchase Order, and Sage 300 Project & Job Costing module is needed for tracking returns against a project.

Contact your Sage Software Solution Provider.

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