



# Return Materials Authorizations



“Accurately track returns & repairs from within Sage 300”

OUR ROBUST RETURN PROCESS HAS BOOSTED SATISFACTION AND REPEAT BUSINESS.



## Why use RMA?

Return Material Authorizations (RMA) lets you integrate robust, repeatable, workflow-based return and repair processes into Sage 300.

- Configure RMA workflows to authorize customer returns, initiate replacement orders, issue credit notes, and return faulty goods to the vendor.
- Upon completion of each return or repair, cross-referenced entries are generated in Sage 300 PO, OE, and IC to keep records synchronized.

Improve customer service while benefiting from reduced stock write-offs and increased cost recovery.

## Key Operational Features

- Automatic allocation and tracking of RMA ID numbers
- Simple, efficient tracking and billing of repairs
- The ability to email return instructions to customers
- Status tracking, based on user-definable status and workflow stage codes

## Customized, Template-based Setup

Templates, either system-wide or at customer level, speed up data entry and validation.

- Define policies to enforce return rules at Item level
- Authorize specific employees, who need not be Sage 300 users, to approve RMAs
- An 'Entered By' field is recorded on all RMA transactions
- Automatic calculation of Restocking Fees
- Multi-currency support



Keep your customers fully informed of progress, using email templates for consistency and RMA-specific email addresses.

Lin.	Line Type	Q	Customer Original Inv...	Q	Item No./Misc...	Description	Restocking Fee?	Q	Location	Quantity
1	Miscellaneous				RET	Returns restocking fee	Yes			0
2	Item		IN00000000000015		A1-103/0	Fluorescent Desk Lamp	No	4		1
3	Item		IN00000000000015		A1-320/0	50W/12V Halogen Bulb	No	1		1
4	Item		IN00000000000015		A1-310/0	Halogen Desk Light	No	1		1

RMA Entry, showing details of last Order & Credit Note for customer

Template Code	Description
REP	Repairs template
RET	Returns template
RETPCT	Returns template - restocking fee % of RMA Price
WAR	Warranty Repairs

Configure templates for different RMA processes

Item Policy

Item Number: A1-470/0 Dry-erase White Board Markers

No Credit Notes Allowed 30 day(s) beyond date of invoice

No Replacement Orders Allowed

Return policies can be defined at Item level

