Return Materials Authorizations

OrchidSystems Sage Tech Partner

"Accurately track returns & repairs from within Sage 300"

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

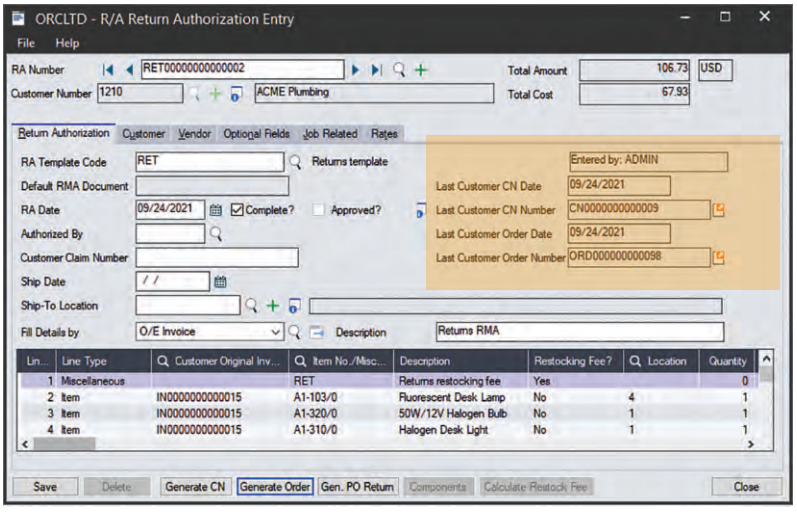
- Automatic allocation and tracking of RMA ID numbers
- Simple, efficient tracking and billing of repairs
- The ability to email return instructions to customers
- Status tracking, based on user-definable status and workflow stage codes

Customized, Template-based Setup

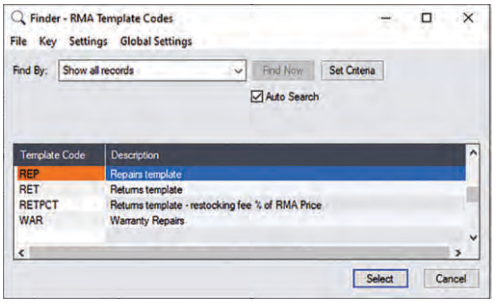
Templates, either system-wide or at customer level, speed up data entry and validation.

- 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

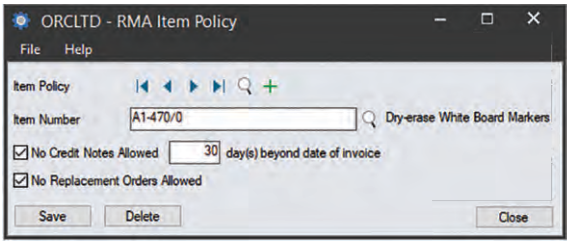
Keep your customers fully informed of progress, using email templates for consistency and RMA-specific email addresses.



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



Configure templates for different RMA processes



Return policies can be defined at Item level

Work smarter with Orchid

Document Creation Options

An RMA can be auto-created from the original customer invoice, and can refer to multiple invoices. Other document creation options include:

- Shipping documentation
- Return Instruction Form for the customer
- OE Customer Credit Note, and return to inventory
- OE Sales Order, to replace returned goods
- PO Inventory return to Vendor

Tracking & Analysis

Various reports and queries provide full visibility of return & repair status.

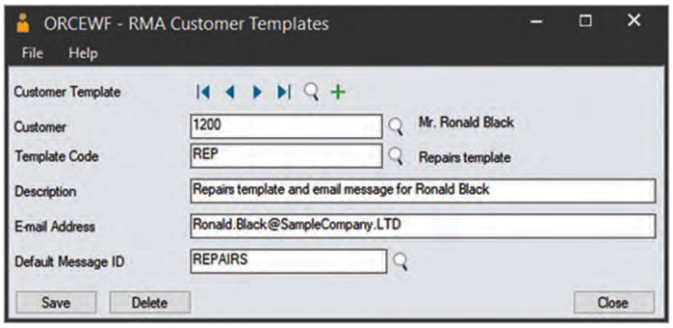
- Track claims for cost recovery (e.g. damaged in transit by a 3rd party shipping company)
- Fault type, Vendor Warranty, and 3rd Party Repair Agent tracking
- Optional Fields at Header, Item, or Miscellaneous Charge level for configurable tracking
- Distributors can record the consumer of the product being returned for analysis purposes

An integrated Sage 300 Module

RMA is developed in the Sage 300 SDK. It stores all data within Sage 300 and integrates seamlessly with these core modules:

- IC, AR, OE, PO, Optional Fields
- Project & Job Costing
- Serialized Inventory & Lot Tracking

RMA also supports Customer, Vendor, and Item Number change, Multiple Contacts for AR, plus Sage 300 Kitting and BOM functionality.



Customer Template, with an RMA-specific email address

12/14/2021 3:31:17PM — Orchid Company Limited - Entity 1 & 5 — Page 1

RMA Analysis by Item Report - Detail (RAITEMRD)

From Item : to: ZZZZZZZZZZZZZZZZZZZZ

From Date : 1/1/2019 to: 12/12/2021

Item Number / Customer No.	Item Description / Customer Name		Sales Quantity	Sales Source Amount	Sales Func. Amount	Returns Quantity	Returns Source Amount	Returns Func. Amount	% Qty Return	% Amount Return
A1-103/0	Fluorescent Desk Lamp									
1100	Bargain Mart - San Diego	USD	113.00	6,778.87	9,614.35	1.00	59.99	92.13	0.88 %	0.96 %
1200	Mr. Ronald Black	USD	87.00	5,219.13	7,385.23	11.00	659.89	1,013.46	12.64 %	13.72 %
1210	ACME Plumbing	USD	78.00	4,570.77	6,527.84	3.00	158.28	243.09	3.85 %	3.72 %
1400	Coastal Electric Company - Toronto	CAD	15.00	899.85	899.85	1.00	59.99	59.99	6.67 %	6.67 %
1600	Dr. Dan Penn	USD	17.00	1,019.83	1,442.23	2.00	119.98	184.27	11.76 %	12.78 %
Total for Item : A1-103/0 - Fluorescent Desk Lamp			310		25,869.50	18		1,592.93	5.81 %	6.16 %
A1-310/0	Halogen Desk Light									
1200	Mr. Ronald Black	USD	71.00	3,574.85	4,978.21	8.00	402.80	618.62	11.27 %	12.43 %
1210	ACME Plumbing	USD	30.00	1,510.50	2,091.74	1.00	50.35	77.33	3.33 %	3.70 %
1600	Dr. Dan Penn	USD	2.00	100.70	138.77	2.00	100.70	154.68	100.00 %	111.45 %

Analytical reports, including Return Rates as % of Sales for Item & Customer

> Orchid RMA has streamlined, secured, and enhanced our processes while allowing for way better tracking and reporting.
>
> JODY ROBERTS, ACCOUNTING MANAGER, MAXILL INC, CANADA

More Information

Further information about RMA, including videos, is available from Orchid's Website: www.orchid.systems/products.

Minimum Requirements

Return Material Authorizations requires Sage 300 System Manager, Inventory Control, Order Entry, and Accounts Receivable. Vendor Returns functionality requires Sage 300 Purchase Order. Sage 300 Project & Job Costing module is needed for tracking returns against a project. Features relate to the latest supported version.

Contact your Sage Software Solution Provider

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