Topic

- Standard Operating Procedure (SOP)

Research Source

- Shipping and Receiving team at Easton Technical Products (where I currently work)

Assignment Description

Work with shipping and receiving department to develop a guidebook for the use of training purposes. Anyone asked to do a Returned material authorization (RMA) should be able to pick up your standard operating procedure guidebook and flow through the RMA process with minimal mistakes made. Be sure to use lots of pictures to help guide people through the difficult computer system.

Easton Technical Products Inc.

Originated by: Kaitlin Weyland

Approved by: Shipping/Receiving

Procedure Number: SR701012

Title: RMA Processing Shipping/Receiving

No. of Pages: 19

1. Purpose

To provide a consistent method with the processing of customer RMA's (Return Material Authorization).

2. Procedure

RMA.ENTRY BLANK SCREEN

1. Enter RMA #
2. Enter to go to next screen
   a. If you have a Warranty/Deficiency that is a TF part, you will need to follow these steps
      i. Set.Facility
      ii. TF

iii. Enter

iv. F3

v. You will do all of the RMA process the same, with few exceptions

1. Right after you go into RMA.ENTRY, you will be given an warning –RMA Number 18995 was set up for Home Facility SL- just hit ok
2. When you are asked what action to take, use #2
3. This will bring up a screen that asks for a reason code use RMS

vi. When done, you will need to set the facility back to SL

NOTE: When the system is updated you will enter the **Date** the RMA is dropped off via UPS, FedEx, USPS, etc...

RMA.ENTRY

1. Look at the Approved By Initial's, this is the CS that entered the RMA
2. Look at the Return Reason
   a. #1 Warranty
   b. #10 CS ENTRY ERROR
   c. #13 CUSTOMER ORDER ERROR
   d. #18 WEB ORDER EXCHANGE
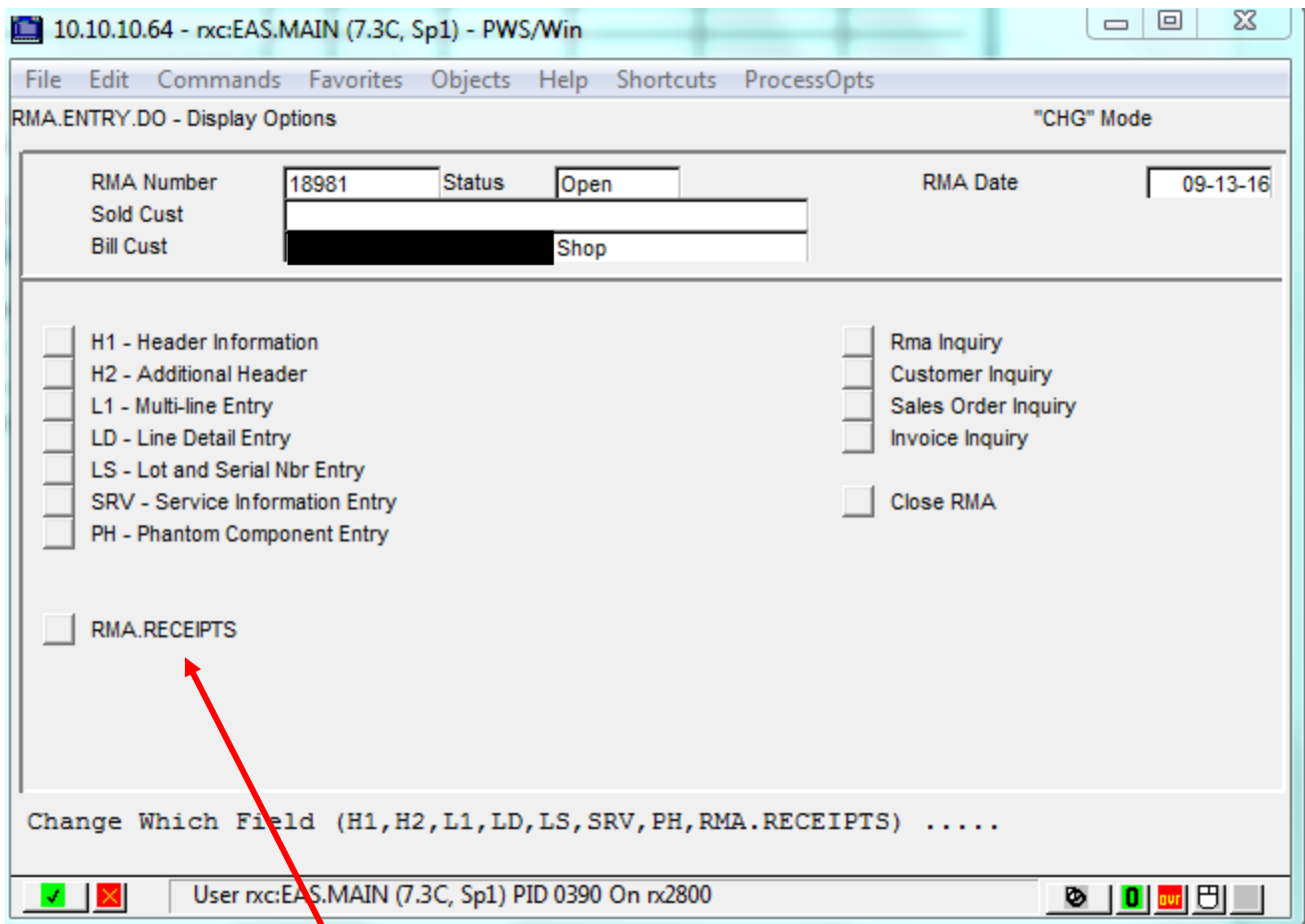   e. #20 SALES REP ERROR
   f. #22 DSL SHIPPING ERROR

g. #26 PRODUCT USED FOR A SHOW
h. #27 CUSTOMER ACCOMMODATION
3. Disposition (Credit, Replacement or Injury/Equipment Claim)
4. Enter L1 to get next screen

NOTE: Until the system is updated, we need to send the CS an email asking the disposition of the RMA, some may already state in the special instructions on if it is a credit or replacement, so be sure to read them.

L1
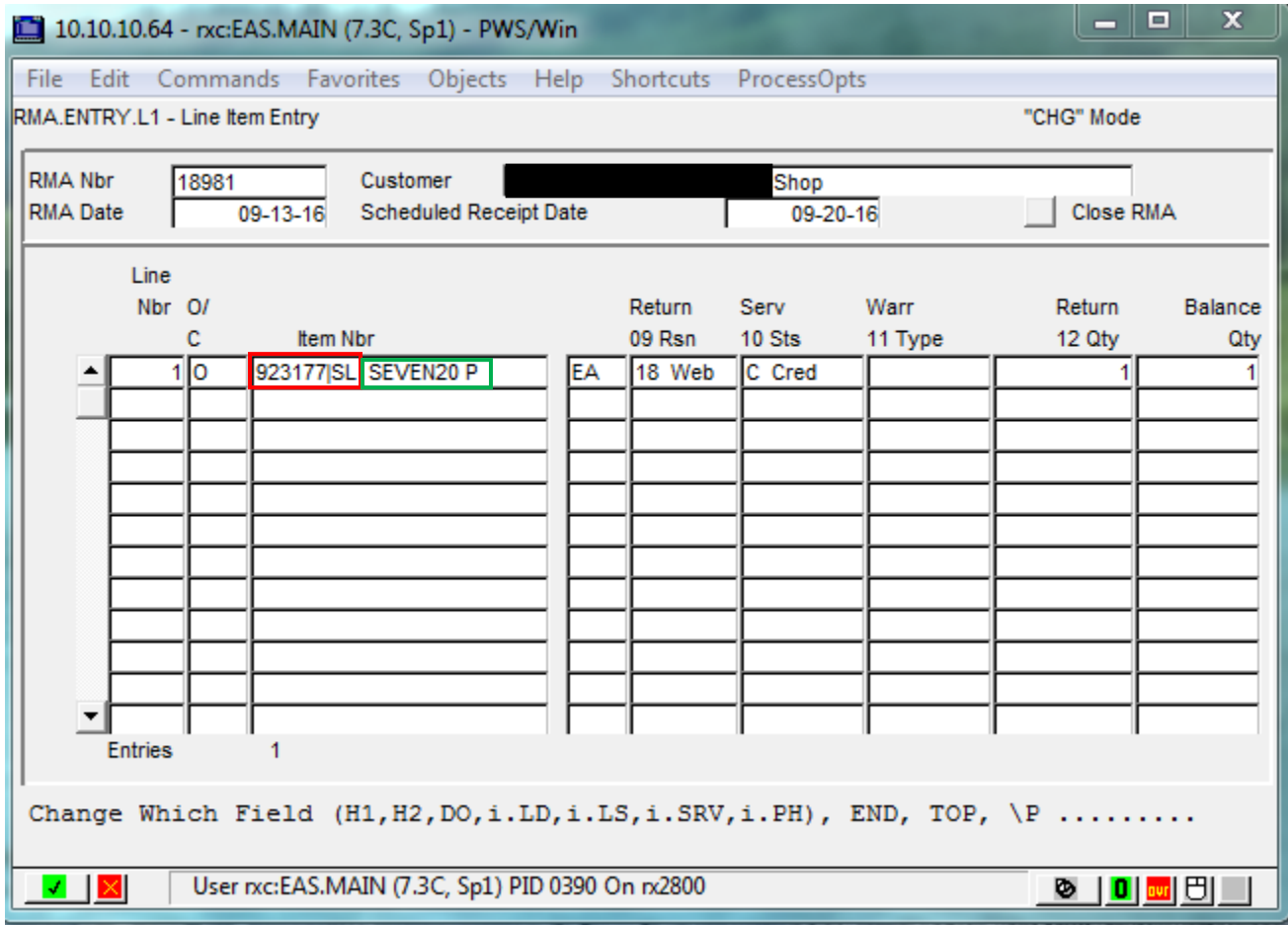
1. Verify Part Number's (SL means Salt Lake TF Means Tru-Flite)
2. Verify Description
3. Verify Quantity to what you physically have
4. If there are any discrepancies, you will need to let the CS know that they need to adjust, at this point, you can't receive anything until they advise you that they have made the changes.
5. Press F2 to go back a screen

File   Edit   Commands   Favorites   Objects   Help   Shortcuts   ProcessOpts

RMA.ENTRY.DO - Display Options   "CHG" Mode

RMA Number	18981	Status	Open

RMA Date   09-13-16

Sold Cust

Bill Cust   ████████████████   Shop

H1 - Header Information   Rma Inquiry
H2 - Additional Header   Customer Inquiry
L1 - Multi-line Entry   Sales Order Inquiry
LD - Line Detail Entry   Invoice Inquiry
LS - Lot and Serial Nbr Entry
SRV - Service Information Entry   Close RMA
PH - Phantom Component Entry

RMA.RECEIPTS

Change Which Field (H1,H2,L1,LD,LS,SRV,PH,RMA.RECEIPTS) .....

User rxc:EAS.MAIN (7.3C, Sp1) PID 0390 On rx2800

1. Press the RMA.RECEIPTS button to go to that screen

RMA.RECEIPTS

1. Enter, Date goes in automatically
2. Enter Your Initial's
3. Enter, MRB will be entered automatically
4. Enter, Location Customer Owned Material – Do not use
5. Enter, Location Material Received Directly – Do not use
6. Enter, Bill of Lading – Do not use
7. Enter, Return Carrier – Do not use
8. Enter, Receiving Remarks – Do not use
9. Enter, Change Which Fields, this is where you enter LD

LD SCREEN #1

1. This where you will enter the Line Numbers on the RMA to be received
2. Enter, this takes you to the next step

LD SCREEN #2

1. Verify Part Number and Description
2. Making sure that the Quantity to receive is the exact same as what you physically have
3. Enter the Quantity of the Part Number
4. Enter, Receipts Location: MRB, this is automatically entered
5. Enter, From IM.Mac ID (????)
6. F3
7. F3
8. F3
9. F3
10. F3
11. F3, goes to Main Screen for next step

MATL.REVIEW

1. Enter Part Number
2. Enter, this takes you to the next screen

MATL.REVIEW SCREEN #2

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10.10.10.64 - rxc:EAS.MAIN (7.3C, Sp1) - PWS/Win                    [_][□][ X ]

 File  Edit  Commands  Favorites  Objects  Help  Shortcuts  Options
 MATL.REVIEW              Material Review Board              Page   1
                   MRB Records for Item Number 923177|SL
--------------------------------------------------------------------------------
MRB ID     Input Doc #   Input Doc Type   Location    Qty Rmng   Update Function
--------------------------------------------------------------------------------
41016      17314*5       RMA              MRB               0    RMA.RECEIPTS
43624      18204*1       RMA              MRB               0    RMA.RECEIPTS
46436      18981*1       RMA              MRB               1    RMA.RECEIPTS









 Enter "X" to exit the function, <CR> or "END" to continue,\P ...
End of Pages to display for this Inquiry
 [✓][✗]   User rxc:EAS.MAIN (7.3C, Sp1) PID 0390 On rx2800        [⊘][1][out][ ][ ]
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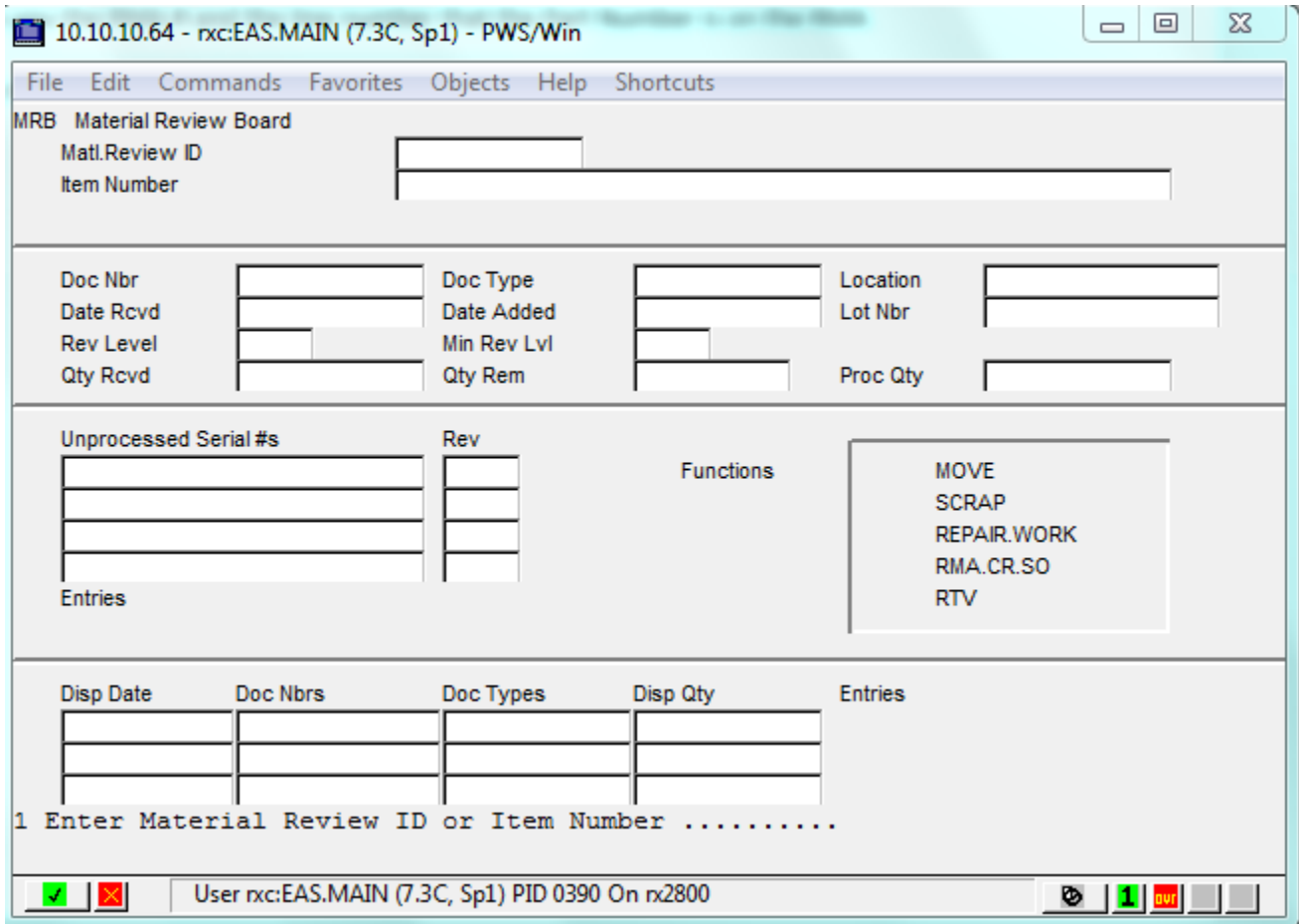
1. Look for your MRB ID (Far Left), it is the bottom number, there is a quantity that is still remaining, write down the MRB ID # because you will need it for your next screen
2. This screen also shows you the RMA # and the line number that the Part Number is on the RMA
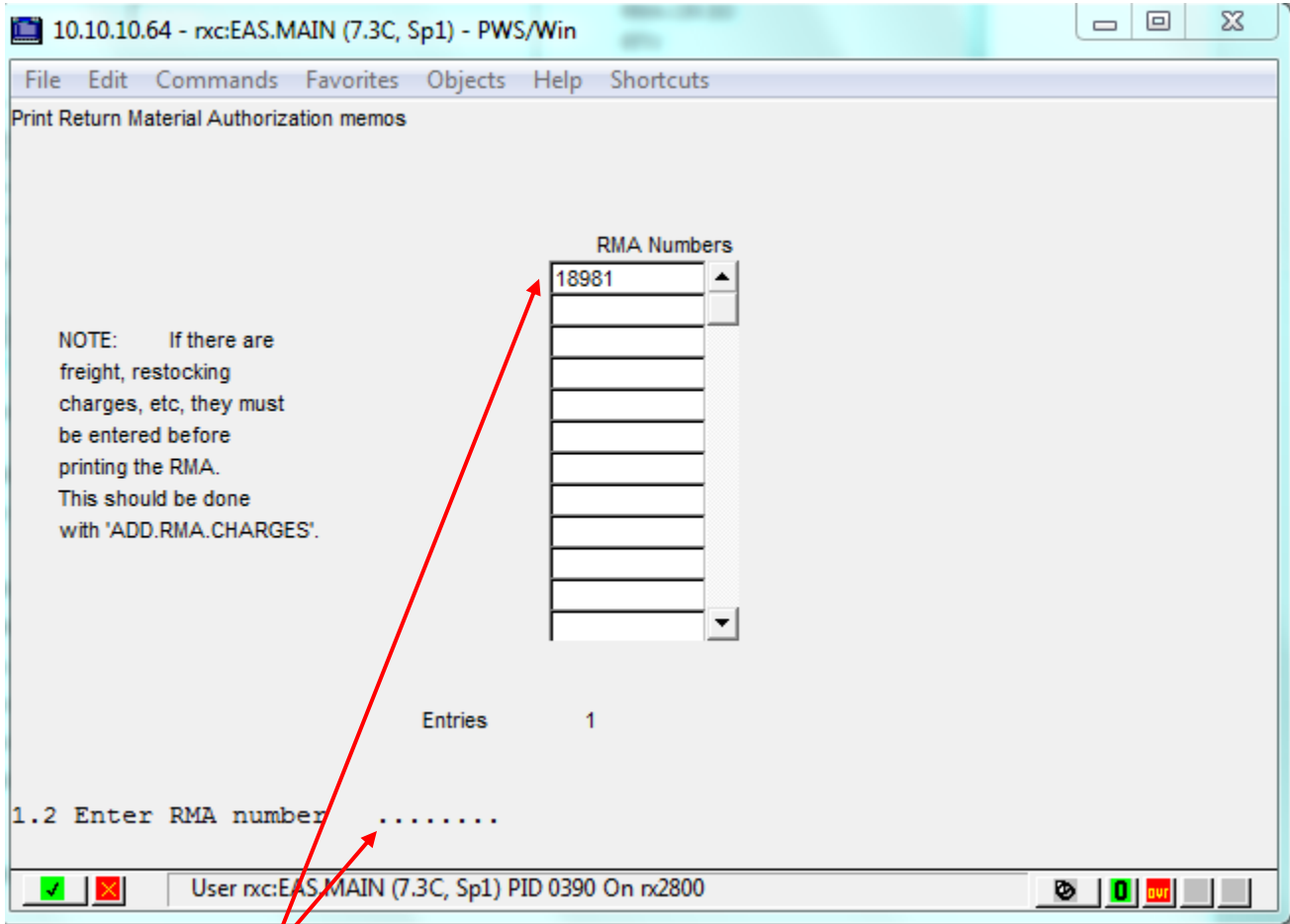3. Enter
4. This Brings you to the next screen

MATL.REVIEW SCREEN #3

In this screen you will be moving product out of MRB to a physical location.

1. Enter the MRB Code
2. Enter
3. Enter the Quantity to Process, which is entered automatically
4. Enter
5. Change Which Field… Press F3
6. Enter Action to take…?? will bring up a list, but #1 (Move)is the most used
   a. For TF it is #2 (Scrap)
7. Move to a location, this must be in all caps
   a. For TF this will not be asked, but it will ask for a reason code, what you will put in is RMS
8. Enter the Reference for this Adjustment, this is where you will put in "RMA#
9. Enter (Machine Number that caused the Quality Problem) – do not use
10. Change Which Field… Press F3
11. F3, goes to Main Screen for next step

PRINT.RMA.MEMO

1. Enter RMA Number
2. F3
3. F3, goes to Main Screen for next step

SPE
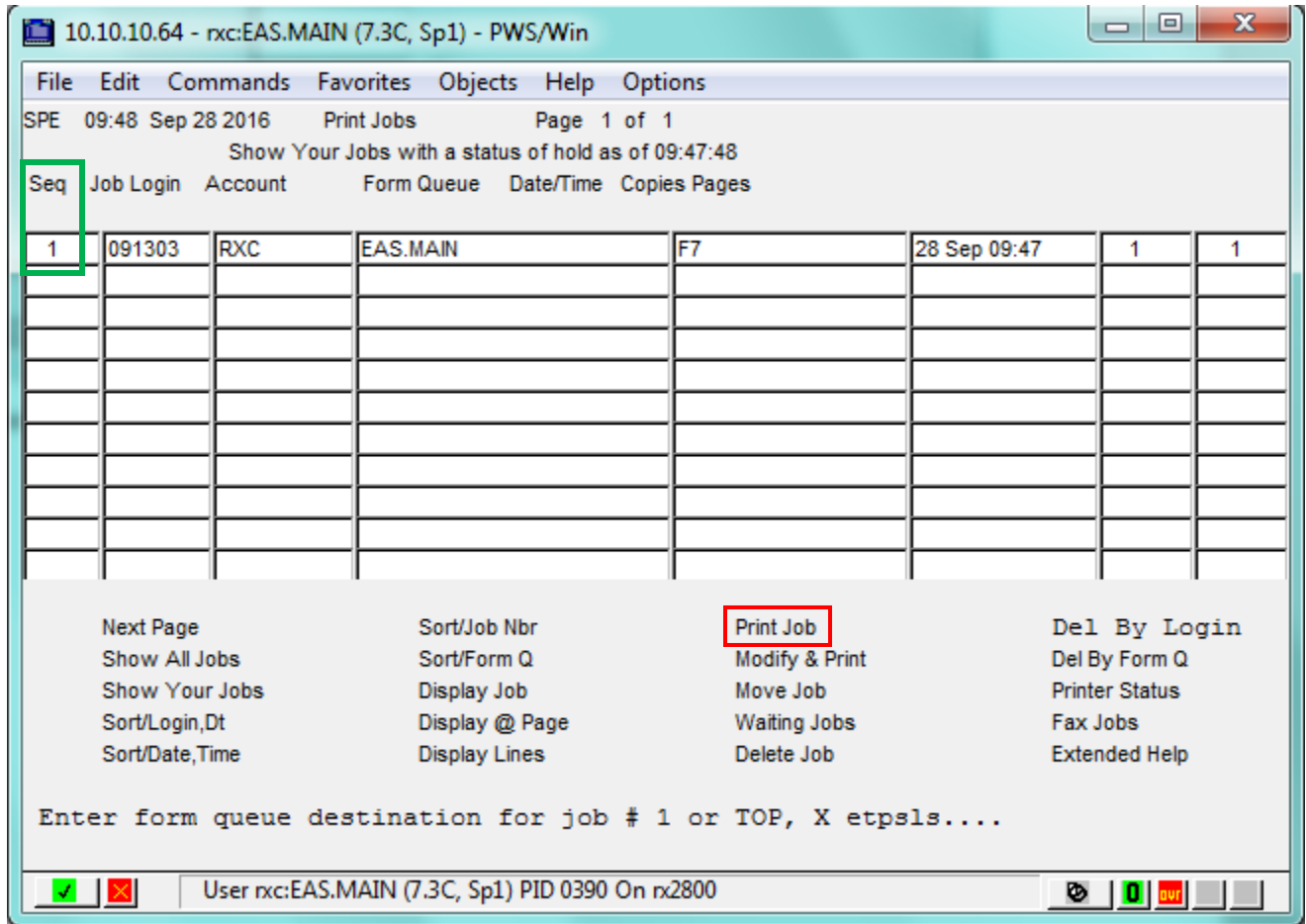
1. Click on Print Job #11
2. Highlight the Sequence number that you wish to print.
3. Enter Form Queue Destination for Job: ETPSLS
4. Enter
5. Do You Wish to Delete Job? Y/N
6. Enter
7. F3 to Main Screen

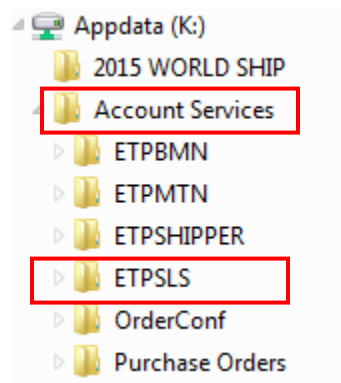NOTE: You will now be going to your computer hard-drive to continue

NOTE: If you are in TF, now is a good time to change back to SL.
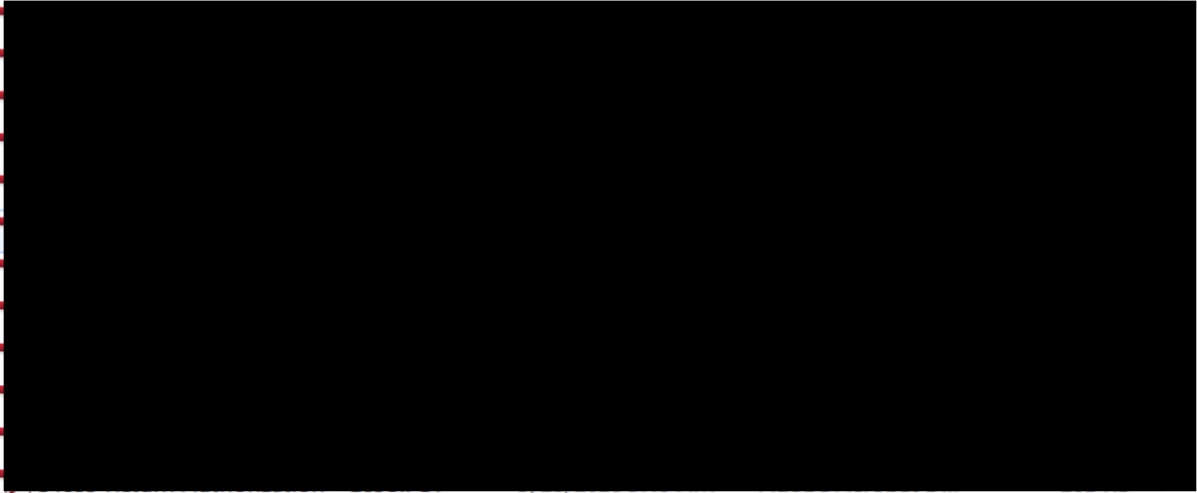
LOCATION: APPDATA K DRIVE (K:\Account Services\ETPSLS)
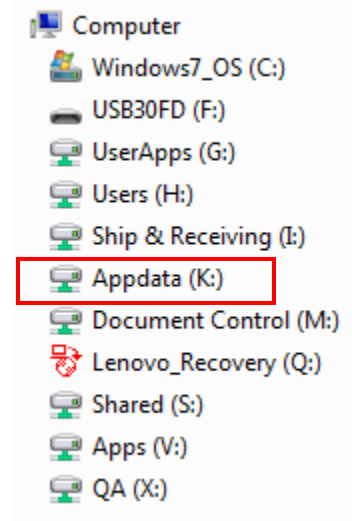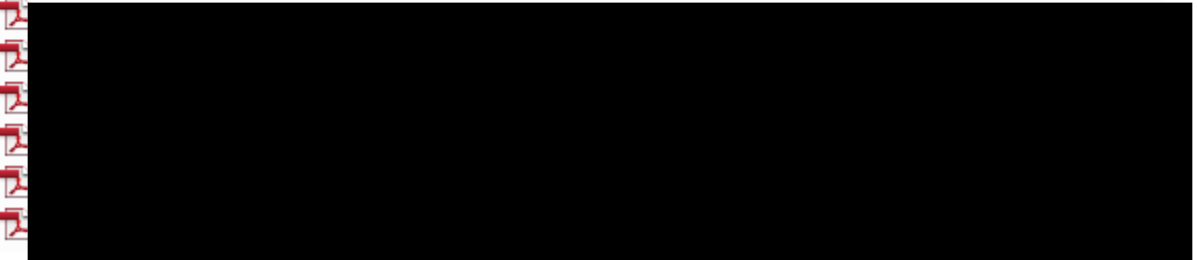
1. You will click on Appdata (K:)

ACCOUNT SERVICES

1. Inside Appdata, you will click on Account Services
2. Inside the Account Services file, you will see ETPSLS, you will double click on it.

ETPSLS

Name	Date modified	Type	Size
Return Authorization 18980.PDF	9/28/2016 7:17 AM	Adobe Acrobat D...	259 KB

You will have to locate the file that you just placed, I think it is best to look at the time and date to see which one is closest to the one that was just done, if not, then you can open the files to see which one matches the RMA that you just completed.

I change the name to Return Authorization 18980.PDF so it is easier to locate when you are ready to attach to an email.

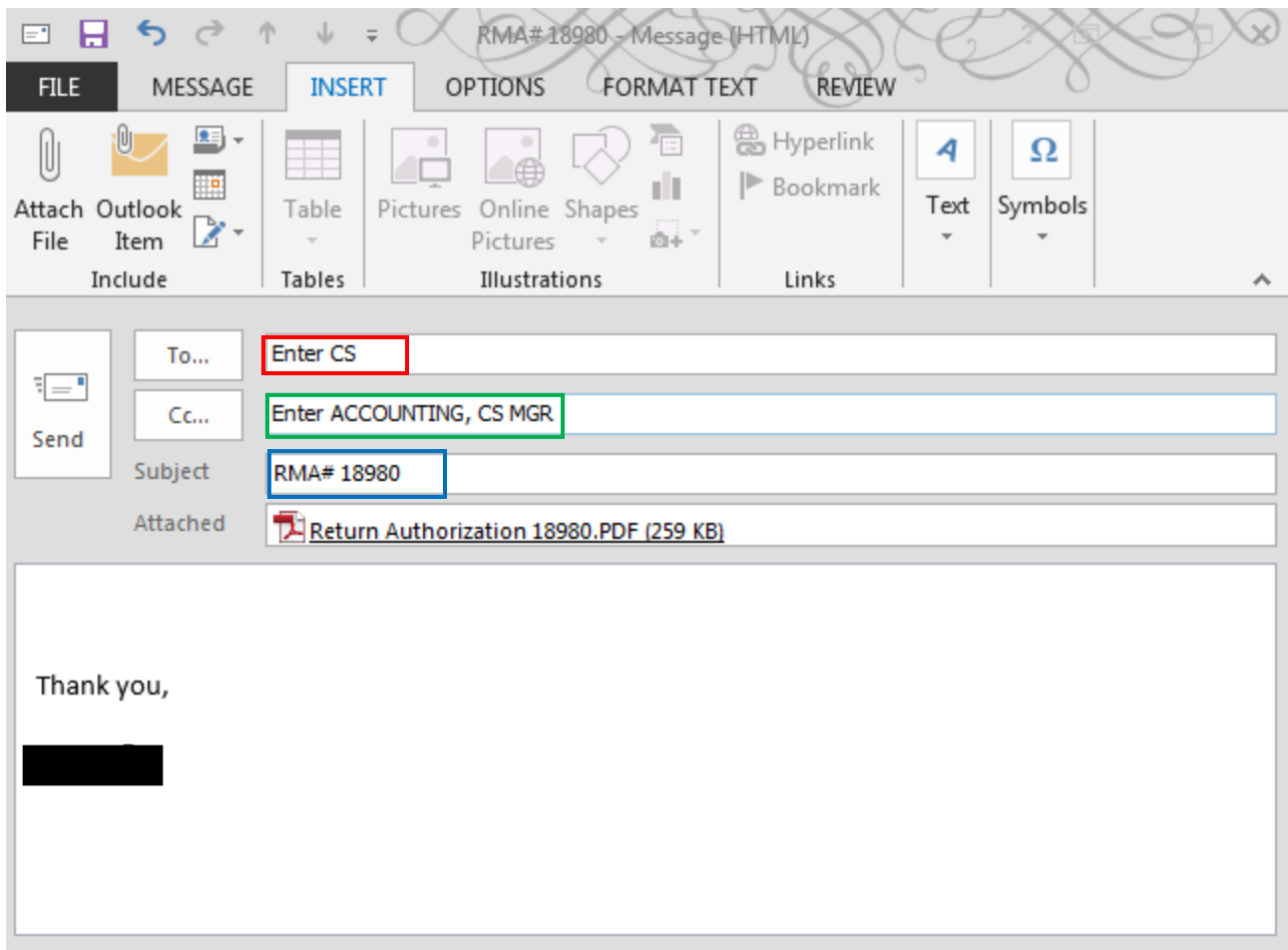EMAIL #1
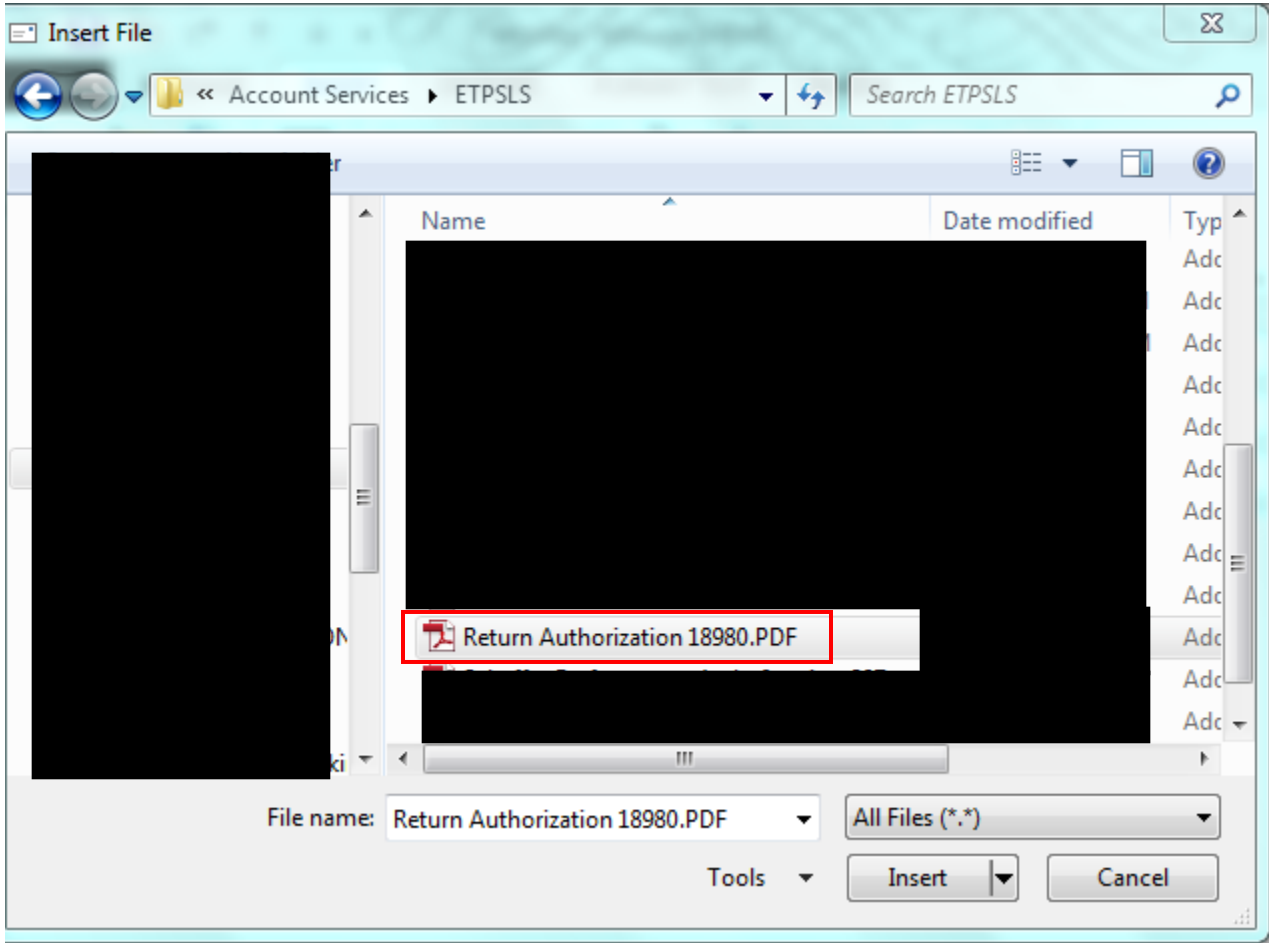
1. New Email
2. Click on the Insert tab

NOTE: You can change the name in this screen as well.

EMAIL #2
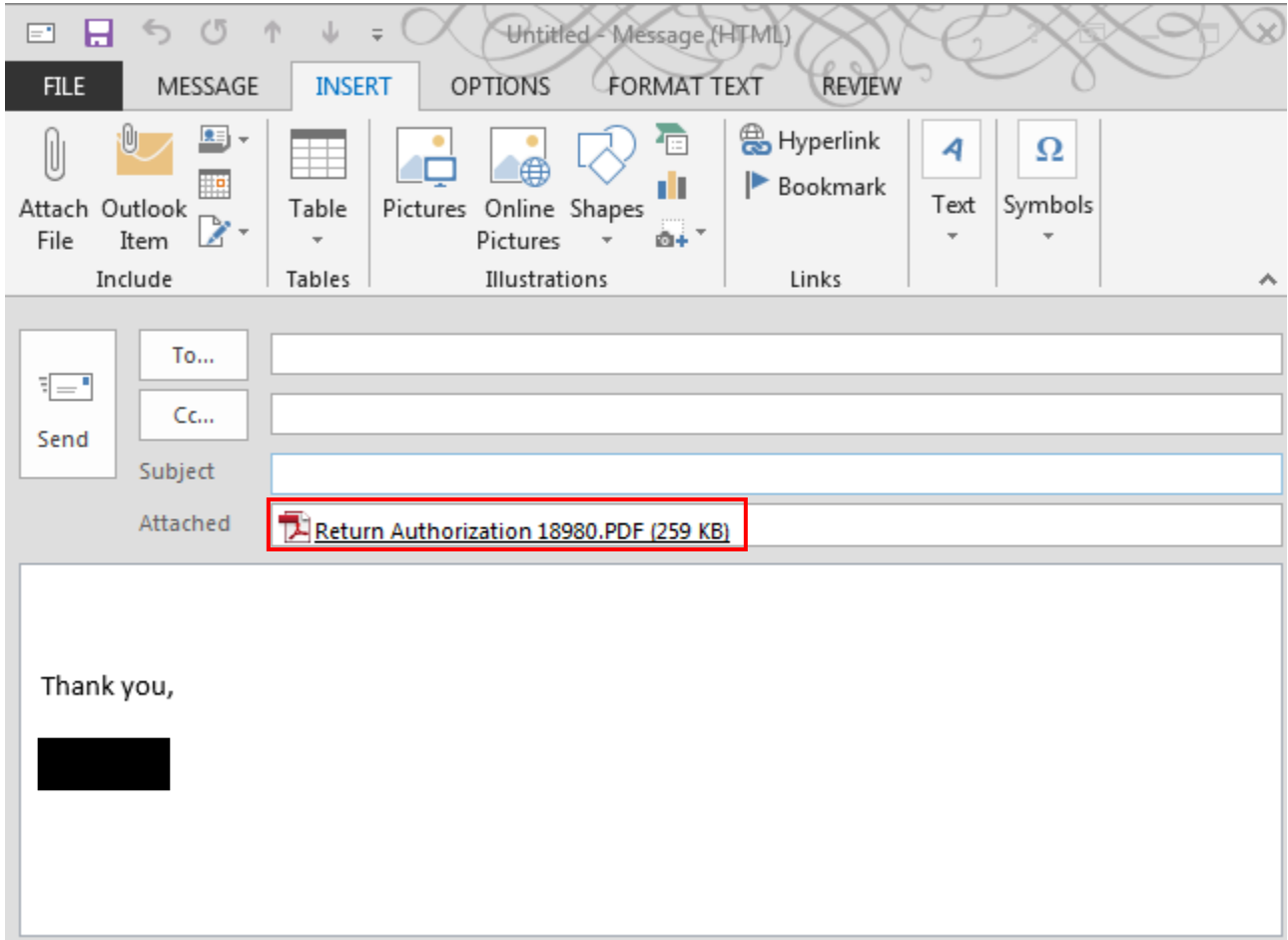
1. Click on Attach File
2. Find the RMA you just did from LOCATION: APPDATA K DRIVE (K:\Account Services\ETPSLS)
3. Double click on it, it will attach to your email
4. You can also verify if you have the correct RMA by clicking on the attached file
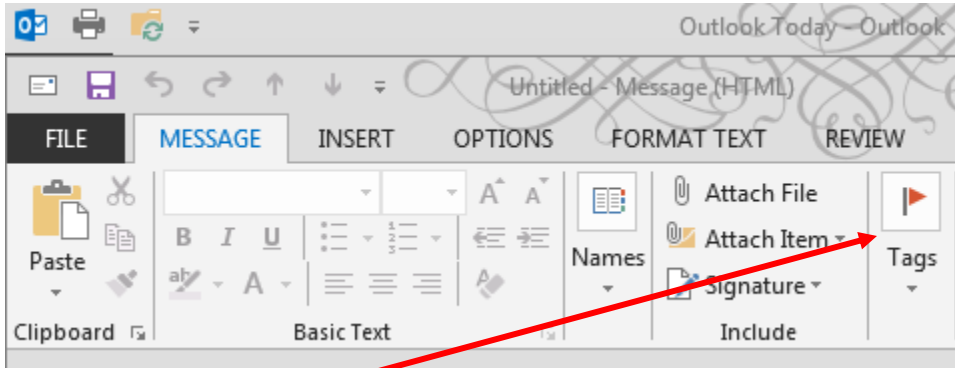
EMAIL #3

1. Enter the CS Email
2. Enter the Accountiing and CS MGR Email
3. Subject should be the RMA#
4. Put a FOLLOW UP /REMINDER on it for the Recipients

NOTE: the emails will go to those as follows:

Replacement – CS up to $500.00

        Add $500 - $5,000 CS MGR

        Add $5,000 - $10,000 Accounting
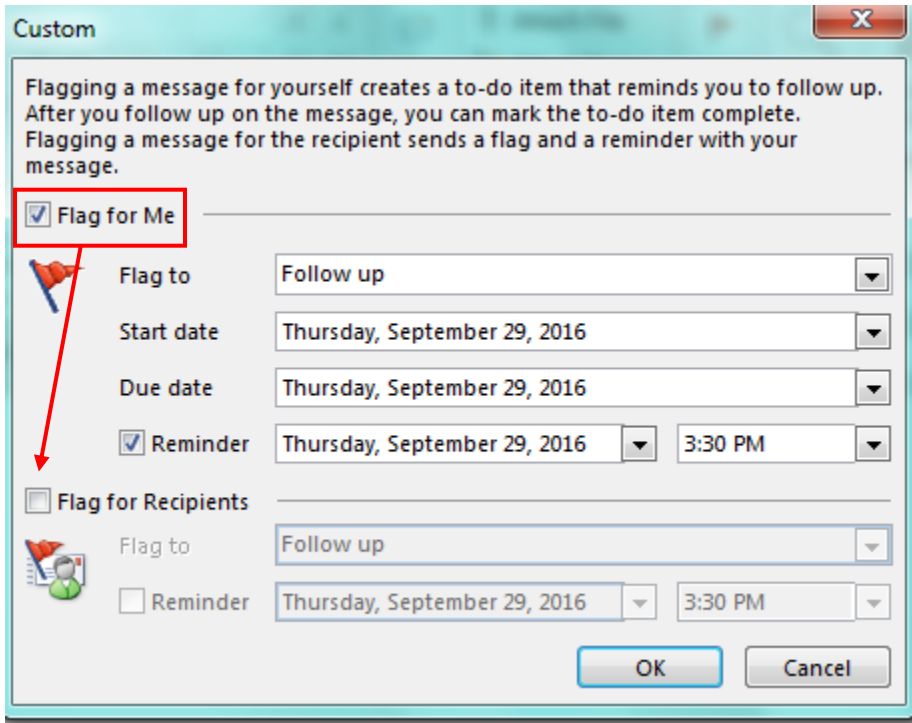
        Add $10,000 + Accounting MGR

Credit – CS

    Accounting

EMAIL #4

1. Click on Tags
2. Follow Up
3. Add Reminder

REMINDER/FOLLOWUP #1

Uncheck the Flag for Me and Check the Flag for Recipients

Check Reminder

REMINDER/FOLLOWUP #2

1. Set the reminder to 24 hours, if on Friday set it for that time on Monday or the next working day