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. Originated by: Kaitlin Weyland

Procedure Number: SR701012 Title: RMA Processing Shipping/Receiving

Approved by: 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

10.10.10.64 - rxc:EAS.MAIN (7.3C, Sp1) - PWS/Win						
File Edit Commands Favorites Objects Help Shortcuts						
MA.ENTRY.H1 - Returned Material Authorization Header "ADD" Mode						
RMA Number Status Approved By	RMA Date Date Approved Sched Receipt					
Sold Cust Bill Cust Contact Country Cust Phone	Original Documents SO Nbr Invoice CM Nbr CM Amt					
Special Instructions Entries Image: Customer Inquiry Customer Inquiry Image: Customer Inquiry Invoice Inquiry Image: Customer Inquiry Image: Customer Inquiry Ima						
1 Enter the RMA Number or <cr> for next available, E</cr>	ND 18959					
User rxc:EAS.MAIN (7.3C, Sp1) PID 0390 On rx2800	<u> </u>					

- 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

10.10.10.64 - rxc:EAS.MAIN (7.3C, Sp1) - PWS/Win					
File Edit Commands Favorites Objects Help Shortcuts ProcessOpts					
RMA.ENTRY.H1 - Returned Material Authorization Header	"CHG" Mode				
RMA Number 18959 Status Open	RMA Date 08-26-16				
Approved By	Date Approved 08-26-16				
Rtn Reason 1 Warranty R&R - #1	Sched Receipt 09-02-16				
Sold Cust	Original Documents				
Bill Cust 1407 MISC. CUSTOMER - CONSUMERS	SO Nbr				
Contact	Invoice				
Country USA UNITED STATES OF AMERICA	CM Nbr				
Cust Phone	CM Amt				
Special Instructions Entries 5					
Customer is sending 2 FMJ 330's for	Rma Inquiry				
warranty inspection. Please give to	Customer Inquiry				
	Sales Order Inquiry				
customer service.	Invoice Inquiry				
	Close RMA				
	RMA.RECEIPTS				
	_				
Change Which Field (S,DO,H2,L1,LD,LS,SRV,PH,RMA.RECEIPTS)					
User rxc:EAS.MAIN (7.3C, Sp1) PID 0390 On rx2800	💩 🖸 🔤 🗒 📃				

- 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.

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10.10.10.64 - rxc:EAS.N	MAIN (7.3C, Sp1) - PW	/S/Win	1000	1000		X
File Edit Commands		Help Shorto	uts ProcessO	pts		
RMA.ENTRY.L1 - Line Item Er	ntry				"CHG" Mode	
RMA Nbr 18981 RMA Date 09-13	Customer 3-16 Scheduled Reco	eipt Date	Shop 09-20	0-16	Close RM	IA
Line Nbr O/ C	Item Nbr	Retu 09 R		Warr 11 Tures	Return	Balance
	3177 SL SEVEN20 P	EA 18 1		11 Type	12 Qty	Qty 1
					-	
					-	
╷╶┢──┝──┝─		_ _			-	
Entries 1						
Change Which Field (H1,H2,DO,i.LD,i.LS,i.SRV,i.PH), END, TOP, \P						
User rxc:E	AS.MAIN (7.3C, Sp1)	PID 0390 On rx28	300		<u> 0</u>	

- 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

(1.)

10.10.10.64 - rxc:EAS.	MAIN (7.3C, Sp1)	- PWS/Win			
File Edit Commands	Favorites Ob	jects Help Shor	tcuts ProcessO	pts	
RMA.ENTRY.DO - Display O	ptions			"CI	HG" Mode
RMA Number	18981 St	atus Open		RMA Date	09-13-16
Sold Cust					
Bill Cust		Shop			
H1 - Header Informa H2 - Additional Head L1 - Multi-line Entry LD - Line Detail Entr LS - Lot and Serial I SRV - Service Infor PH - Phantom Comp RMA.RECEIPTS	der Y Nbr Entry mation Entry onent Entry	I TD TS SDV D	W DWA DECET	Rma Inquiry Customer Inquiry Sales Order Inquir Invoice Inquiry Close RMA	ſŶ
User rxc:	EAS.MAIN (7.3C,	Sp1) PID 0390 On rx	2800		8 <u>0 m</u> 8

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

RMA.RECEIPTS

10.10.10.64 - rxc:EAS.MAIN (7.3C, Sp1) - PWS/Win							
File Edit Commands Favorites Objects Help Options							
RMA.RECEIPTS.H1 - RMA Receipts Header "CHG" Mode							
RMA Number 18981 Approved By Emil Rtn Reason 18 Web Order	Status Open Exchange #18	RMA Date Date Approved Sched Receipt	09-13-16 09-13-16 09-20-16				
Sold Cust Bill Cust	Shop	Original Docume SO Nbr Invoice Nbr					
Previous Receipt Nbr Receipt Date		Rma Inquiry RMA.ENTR					
Current Receipt Nbr Receipt Date Received By Default Locations MRB COM Stock	Bill of Lading Return Carrier Receiving Rer		Entries 0				
15 Enter the Date Received			8 0 0				

- 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

🛄 10.10.10.64 - rxc:EAS.MAIN (7.3C, Sp1) - PWS/Win							
File Edit Commands Favorites Objects Help Options							
RMA.RECEIPTS.H1 - RMA Receipts Header "CHG" Mode							
RMA Number 18981 Status Open Approved By Image: Comparison of the state of th	RMA Date 09-13-16 Date Approved 09-13-16 Sched Receipt 09-20-16 Original Documents						
Sold Cust Bill Cust Shop	SO Nbr 430109 Invoice Nbr 943802						
Previous Receipt Nbr 0 Receipt Date	Rma Inquiry RMA.ENTRY						
Current Receipt Nbr 1 Receipt Date 09-28-16 Received By Default Locations MRB COM Stock	Bill of Lading Return Carrier Receiving Remarks Entries 0						
1 Enter a Line Number to Change, END 1							
User rxc:EAS.MAIN (7.3C, Sp1) PID 0390 On rx2800							

- 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

🛄 10.10.10.64 - rxc:EAS.MAIN (7.3C, Sp1) - PWS/Win								
File Edit Commands Favorites Objects Help Options								
RMA.RECEIPTS.LD - Line Item Detail Re	RMA.RECEIPTS.LD - Line Item Detail Receipts "CHG" Mode							
RMA Nbr 18981 RMA Date 09-13-16 Receipt Nbr 1	Customer Line Nbr 1 Status Receipt Date	Shop Open 09-28-16						
Return Reason 18 Web O	/EN20 PACK BL/RED/YEL F C TEAM COLOR 6 TARGET, BLUE RED YE rder Exchange # leturn to Stoc 1 Received To Date	Stock UOM EA						
Cty Loc	ACN Lot Number	21 Serial Numbers						
17.1 Enter the Quantity	Received, TOP							
User rxc:EAS.MAI	N (7.3C, Sp1) PID 0390 On rx2800	<u>></u>						

- (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

🗎 10.10.10.64 - rxc:EAS.MAIN (7.3C, Sp1) - PWS/Win					
File Edit Commands Favorites Objects Help	Shortcuts				
MRB Material Review Board Matl.Review ID Item Number					
Doc Nbr Doc Type Date Rcvd Date Added Rev Level Min Rev Lvl Qty Rcvd Qty Rem		Location Lot Nbr Proc Qty			
Unprocessed Serial #s Rev	Functions	MOVE SCRAP REPAIR.WOR RMA.CR.SO	ĸ		
Entries		RTV			
Disp Date Doc Nbrs Doc Types	Disp Qty	Entries			
User rxc:EAS.MAIN (7.36, Sp1) PID 0390) On rx2800		ð <u>0</u>		

1. Enter Part Number

2. Enter, this takes you to the next screen

10.10.10.64	4 - rxc:EAS.MAIN (7.	3C, Sp1) - PWS/Win					
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</cr>							
ind of Pag							
	User fxc:EAS.MAI	N (7.3C, Sp1) PID 0390 O	n rx2800		<u> </u>		

- 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

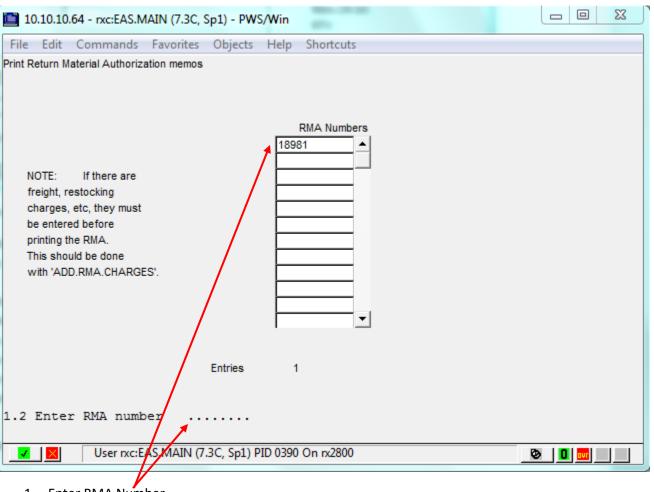
MATL.REVIEW SCREEN #3

10.10.10.64 - rxc:EAS.MAIN (7.3C, S	p1) - PWS/Win			
File Edit Commands Favorites MRB Material Review Board Matl.Review ID Item Number	Objects Help	Shortcuts		
Doc Nbr Date Rcvd Rev Level Qty Rcvd	Doc Type Date Added Min Rev Lvl Qty Rem		Location Lot Nbr Proc Qty	
Unprocessed Serial #s	Rev	Functions	MOVE SCRAP REPAIR.WORI RMA.CR.SO RTV	<
Disp Date Doc Nbrs	DocTypes	Disp Qty	Entries	
User rxc:EAS.MAIN (7.3	3C, Sp1) PID 0390 (On rx2800	_1	ð <u>1</u>

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

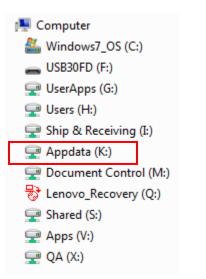
1	🛄 10.10.10.64 - rxc:EAS.MAIN (7.3C, Sp1) - PWS/Win									
	File Edit Commands Favorites Objects Help Options									
SPE	SPE 09:48 Sep 28 2016 Print Jobs Page 1 of 1 Show Your Jobs with a status of hold as of 09:47:48									
Seq	Job Login 🧳	Account	Form Queue Date/Time Copi	es Pages						
1	091303	RXC	EAS.MAIN	F7	28 Sep 09:47	1 1				
	-			·						
⊢		·		·	-					
⊢		·		-		-				
	Next Page		Sort/Job Nbr	Print Job	De	l By Login				
	Show All J	obs	Sort/Form Q	Modify & Print		By Form Q				
	Show You	r Jobs	Display Job	Move Job		nter Status				
Sort/Login,Dt			Display @ Page	Waiting Jobs		Fax Jobs				
Sort/Date,Time Display Lines Delete Job Extended Help						ended Help				
Ent	Enter form queue destination for job # 1 or TOP, X etpsls									
_	User rxc:EAS.MAIN (7.3C, Sp1) PID 0390 On rx2800									

- (1.) Click on Print Job #11
- Highlight the Sequence number that you wish to print.
 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

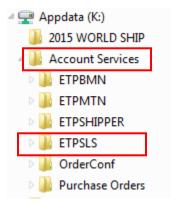
NOTE: If you are in TF, now is a good time to change back to SL.

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

Date modified	Туре	Size	
-11			
9/28/2016 7:17 AM	Adobe Acrobat D	259 KB	
	Date modified		

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

Insert File	Contraction (2000	23
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:r		!≡ ▼ 🔳	0
E	Name	Date modified	Typ Adc Adc Adc Adc Adc Adc Adc Adc Adc E
)N ki ▼ File name:	Return Authorization 18980.PDF	All Files (*.*)	Adc Adc Adc Adc
	10015 👻	Insert 🗨 Cance	

- 1. New Email
- 2. Click on the Insert tab

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

FILE	ち び 1 MESSAGE	v ↓ = INSERT	OPTIONS	ed Message (F	2 Con	$\zeta \longrightarrow $	9%
Attach Out	ook m 2 ~		ictures Online Pictures Illustrati	Shapes	Hyperlink Bookmark	4 Ω Text Symbols • •	*
	To Cc						
Thank yo	Attached	Return 4	Authorization 189	980.PDF (259 KB)	1		

- 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

🖻 🔒 🍤 👌	↑ ↓ = RMA#18980 - Message I	нтир	XX 9 VQ
FILE MESSAGE	INSERT OPTIONS FORMAT TEX	T REVIEW	\sim \sim
Attach Outlook File Item Include		Hyperlink Bookmark Links	Ω Symbols
То	Enter CS		
ت ــــ	Enter ACCOUNTING, CS MGR		
Send Subject	RMA# 18980		
Attached			
Attucticu	Return Authorization 18980.PDF (259 KB)		
Thenkyou			
Thank you,			

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:

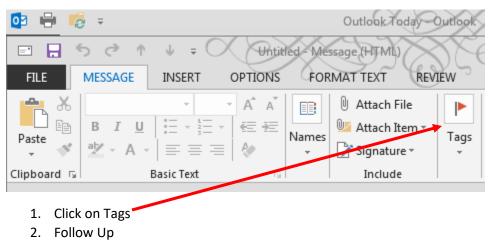
Replacement – CS up to \$500.00

- Add \$500 \$5,000 CS MGR
- Add \$5,000 \$10,000 Accounting
- Add \$10,000 + Accounting MGR

Credit – CS

Accounting

EMAIL #4



3. Add Reminder

REMINDER/FOLLOWUP #1

Custom		×					
Flagging a message for yourself creates a to-do item that reminds you to follow up. After you follow up on the message, you can mark the to-do item complete. Flagging a message for the recipient sends a flag and a reminder with your message.							
🔽 Flag	for Me						
1	Flag to	Follow up					
1	Start date	Thursday, September 29, 2016					
	Due date	Thursday, September 29, 2016					
↓	🔽 Reminder	Thursday, September 29, 2016 💌 3:30 PM 💌					
🔲 Flag	for Recipients						
1	Flag to	Follow up 👻					
	Reminder	Thursday, September 29, 2016 👻 3:30 PM 👻					
		OK Cancel					

Uncheck the Flag for Me and Check the Flag for Recipients

Check Reminder

REMINDER/FOLLOWUP #2

Custom		Σ	3					
Flagging a message for yourself creates a to-do item that reminds you to follow up. After you follow up on the message, you can mark the to-do item complete. Flagging a message for the recipient sends a flag and a reminder with your message.								
📃 Flag	for Me		_					
1	Flag to	Follow up	-					
`	Start date	Thursday, September 29, 2016	-					
	Due date	Thursday, September 29, 2016	-					
	✓ Reminder	Thursday, September 29, 2016 👻 3:30 PM	Ŧ					
V Flag for Recipients								
1	Flag to	Follow up	•					
- C	Reminder	Thursday, September 29, 2016 🔹 3:30 PM	•					
		OK Cancel						

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