# 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<br>SO Nbr<br>Invoice<br>CM Nbr<br>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.

| ı. | 1 |
|----|---|
| L  | Т |

| 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<br>RMA Date 09-13                                  | Customer<br>3-16 Scheduled Reco | eipt Date        | Shop<br>09-20 | 0-16             | Close RM   | IA       |
| Line<br>Nbr O/<br>C  | Item Nbr                        | Retu<br>09 R     |               | Warr<br>11 Tures | Return     | Balance  |
|  | 3177 SL SEVEN20 P               | EA 18 1          |               | 11 Type          | 12 Qty     | Qty<br>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<br>H2 - Additional Head<br>L1 - Multi-line Entry<br>LD - Line Detail Entr<br>LS - Lot and Serial I<br>SRV - Service Infor<br>PH - Phantom Comp<br>RMA.RECEIPTS | der<br>Y<br>Nbr Entry<br>mation Entry<br>onent Entry | I TD TS SDV D       | W DWA DECET    | Rma Inquiry<br>Customer Inquiry<br>Sales Order Inquir<br>Invoice Inquiry<br>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<br>Approved By Emil<br>Rtn Reason 18 Web Order              | Status Open<br>Exchange #18                       | RMA Date<br>Date Approved<br>Sched Receipt | 09-13-16<br>09-13-16<br>09-20-16 |  |  |  |  |
| Sold Cust<br>Bill Cust   | Shop  | Original Docume<br>SO Nbr<br>Invoice Nbr   |                                  |  |  |  |  |
| Previous<br>Receipt Nbr<br>Receipt Date                                      |   | Rma Inquiry<br>RMA.ENTR                    |                                  |  |  |  |  |
| Current Receipt Nbr Receipt Date Received By Default Locations MRB COM Stock | Bill of Lading<br>Return Carrier<br>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<br>Bill Cust Shop   | SO Nbr 430109<br>Invoice Nbr 943802  |  |  |  |  |  |  |
| Previous<br>Receipt Nbr 0<br>Receipt Date   | Rma Inquiry<br>RMA.ENTRY   |  |  |  |  |  |  |
| Current Receipt Nbr 1 Receipt Date 09-28-16 Received By Default Locations MRB COM Stock   | Bill of Lading<br>Return Carrier<br>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<br>Line Nbr 1 Status<br>Receipt Date  | Shop<br>Open<br>09-28-16 |  |  |  |  |  |  |
| Return Reason 18 Web O  | /EN20 PACK BL/RED/YEL F<br>C TEAM COLOR 6 TARGET, BLUE RED YE<br>rder Exchange #<br>leturn to Stoc<br>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>&gt;</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<br>Matl.Review ID<br>Item Number   |             |  |            |  |  |
| Doc Nbr     Doc Type       Date Rcvd     Date Added       Rev Level     Min Rev Lvl       Qty Rcvd     Qty Rem |             | Location<br>Lot Nbr<br>Proc Qty          |            |  |  |
| Unprocessed Serial #s Rev  | Functions   | MOVE<br>SCRAP<br>REPAIR.WOR<br>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<br>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<br/>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

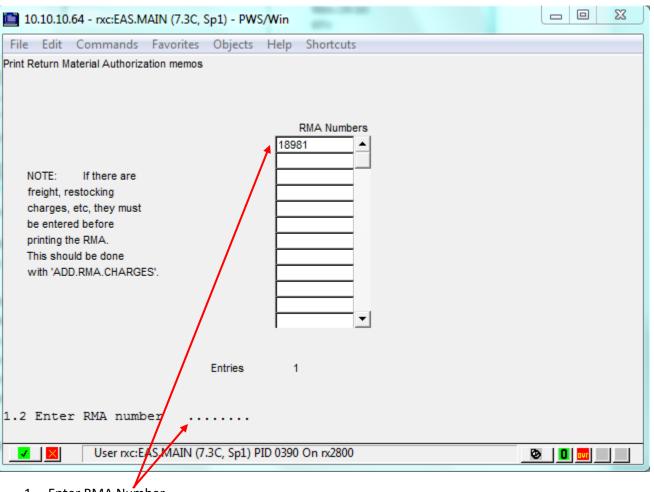
#### MATL.REVIEW SCREEN #3

| 10.10.10.64 - rxc:EAS.MAIN (7.3C, S  | p1) - PWS/Win                                    |           |  |            |
|--|--|-----------|--|------------|
| File Edit Commands Favorites<br>MRB Material Review Board<br>Matl.Review ID<br>Item Number | Objects Help                                     | Shortcuts |  |            |
| Doc Nbr<br>Date Rcvd<br>Rev Level<br>Qty Rcvd  | Doc Type<br>Date Added<br>Min Rev Lvl<br>Qty Rem |           | Location<br>Lot Nbr<br>Proc Qty                  |            |
| Unprocessed Serial #s  | Rev  | Functions | MOVE<br>SCRAP<br>REPAIR.WORI<br>RMA.CR.SO<br>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

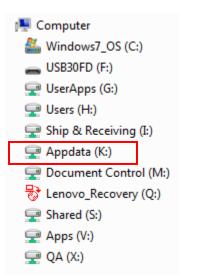
| 1   | 🛄 10.10.10.64 - rxc:EAS.MAIN (7.3C, Sp1) - PWS/Win  |         |                           |                |              |             |  |  |  |  |
|---|---|---------|---------------------------|----------------|--------------|-------------|--|--|--|--|
|   | File Edit Commands Favorites Objects Help Options   |         |                           |                |              |             |  |  |  |  |
| SPE   | SPE 09:48 Sep 28 2016 Print Jobs Page 1 of 1<br>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   |         |                           |                |              |             |  |  |  |  |
| <b>_</b>  | 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

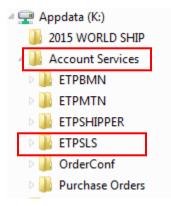
NOTE: If you are in TF, now is a good time to change back to SL.

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   |  |
|-------------------|-----------------|--------|--|
|                   |                 |        |  |
|                   |                 |        |  |
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| 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   |
|--------------------------|--------------------------------|-----------------|--|
| 😋 🔍 🔻 📕 « Account Servic | es 🕨 ETPSLS 👻 🐓                | Search ETPSLS   | ٩  |
| :r                       |                                | !≡ ▼ 🔳          | 0  |
| E                        | Name                           | Date modified   | Typ Adc<br>Adc<br>Adc<br>Adc<br>Adc<br>Adc<br>Adc<br>Adc<br>Adc<br>E |
| )N<br>ki ▼<br>File name: | Return Authorization 18980.PDF | All Files (*.*) | Adc<br>Adc<br>Adc<br>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<br>MESSAGE | v ↓ =<br>INSERT | OPTIONS                                  | ed Message (F    | 2 Con                 | $\zeta \longrightarrow $           | 9% |
|------------|------------------|-----------------|--|------------------|-----------------------|------------------------------------|----|
| Attach Out | ook<br>m 2 ~     |                 | ictures Online<br>Pictures<br>Illustrati | Shapes           | Hyperlink<br>Bookmark | 4   Ω     Text   Symbols     •   • | *  |
|            | To<br>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<br>File Item<br>Include |   | Hyperlink<br>Bookmark<br>Links | Ω<br>Symbols  |
|  |   |                                |               |
| То                                     | Enter CS                                |                                |               |
| ت <b>ــــ</b>                          | 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:

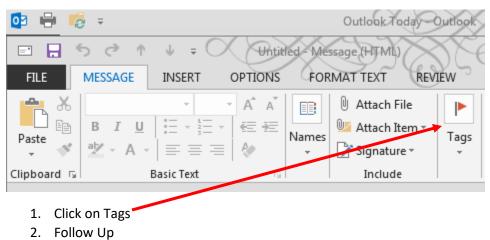
Replacement – CS up to \$500.00

- 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.<br>After you follow up on the message, you can mark the to-do item complete.<br>Flagging a message for the recipient sends a flag and a reminder with your<br>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.<br>After you follow up on the message, you can mark the to-do item complete.<br>Flagging a message for the recipient sends a flag and a reminder with your<br>message. |            |  |   |  |  |  |  |  |
| 📃 Flag   | for Me     |  | _ |  |  |  |  |  |
| 1  | Flag to    | Follow up                              | - |  |  |  |  |  |
| <b>`</b>   | 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                              | • |  |  |  |  |  |
| - <b>C</b>   | 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