

ChannelOnline™ RMA Usage Guide

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Overview

ChannelOnline provides a document within its interface to facilitate the ability to accept return merchandise from your end customer. The document type responsible for merchandise returns is called an RMA (Return Merchandise Authorization) and will allow resellers to track the status of their product returns. Adding products to an RMA will provide your customers with a “credit” for the returned product. This guide will explain complete process workflow for managing product returns within ChannelOnline.

Useful Terminology

Term	Description
RMA	A document to manage the return of a product from an end customer.
Supplier RMA	A document to manage the return of a product to a supplier/distributor.

A typical RMA process may include:

- Creation of an RMA based on products in a submitted sales order.
- Creation of an RMA from a quote for products not associated with a ChannelOnline sales order.
- Creation of an RMA by an end customer on the store site from a sales order (via account activity).
- Creation of a supplier RMA from a customer RMA.
- Creation of a supplier RMA based on a product from a submitted supplier purchase order.

ChannelOnline provides you with the ability to:

- Browse through RMAs via a dedicated RMAs tab.
- Perform reporting against your submitted RMAs (similar to sales reporting).
- Enable or disable user access permissions to control the approval/declination of RMAs.
- Print and email RMA documents.
- Send automated emails to internal approvers

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Available RMA Statuses

Approved • Completed • Declined • On Hold / Review • Pending • Submitted

Activating RMA Functionality

To activate RMAs in ChannelOnline you will need to navigate to: *Admin > Company Settings > Document Settings*. In the section titled 'RMAs', click on the box next to "Enable RMAs." Click the 'save' button at the bottom of the page to commit your changes.

RMAs	<input type="checkbox"/>	Enable RMAs NOTE: Please enable on the individual stores after enabling this option.
		To all the RMA line items apply a fee of: <input type="text" value="0.00"/> %
		To all the RMA line items apply a handling fee of: \$ <input type="text" value="0.00"/>
	<input type="checkbox"/>	Enable automatic email to ALL approvers when an RMA is created internally. Please update "RMA Submitted for Approval Notification" template to control who gets notified.
	<input type="checkbox"/>	The Customer RMA document numbering starts at 10000. You may reset the starting number by entering a new number in the following text box and checking it. The new number must be greater than the last created Customer RMA document # <input type="text" value="10002"/>

Establishing RMA Fees

From the RMA activation area you are able to configure ChannelOnline to automatically apply fees to:

- All products in the RMA by percentage of the price.
- One-time flat handling fee for the entire RMA in dollars.

You may configure one, both, or neither fee option depending on your business rules.

Here you can also enable the ability for the system to send an email to all approvers when a RMA is submitted either internally or on the storesite and change the document numbering sequence to a greater value.

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Granting RMA Access Permissions

Once you have enabled RMA documents, you need to make sure that your sales team has the proper permissions to work with RMAs. By default all RMA permissions are enabled for members of the “Admin SalesRep – Buyer” profile. Access Rights Profiles can be found at: *Admin > Personnel > Access Rights*

Documents ?	
Edit Price (I.e. Customer Price, Cost, Margin, Profit)	
Create / Edit Manual Line Item	
Ability to unlock Quotes, Sales Orders Invoices and RMAs	
Ability to approve for Credit Hold or Review All Orders	
View all Quotes, Proposals, Sales Orders, Invoices and RMA(s)	
Create / Edit Quotes and Proposals for all Customers	
Create / Edit Sales Orders for all Customers	
Create / Edit Invoices	
Edit Expiration Date	
View customer credit card information	
Create / Edit / Delete Unauthorized RMAs.	
Approve, Decline and Finalize Submitted RMAs.	
View Company Purchase Approval System documents in Admin.	

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There are three user access rights available for RMAs that can be found below the 'Documents' and 'Purchasing' sections.

- **Create / Edit / Delete Unauthorized RMAs.** (*Documents Section*) – Allows a sales team member to generate a customer RMA and save it. Customer RMAs require approval before they are submitted.
- **Approve / Decline / Finalize Submitted RMAs.** (*Documents Section*) – This permission will need to be granted to the members of your team who will be responsible for approving RMAs. By default, sales team members with this permission will receive an email every time an RMA is submitted for approval on the store site.
- **Manage Supplier RMA(s); Create / Process Supplier RMAs.** (*Purchasing Section*) – Controls whether or not a sales team member can create and link a supplier RMA from/to the original customer RMA. This permission is typically only granted to the purchasing team since it is a supplier-facing transaction.

Managing RMA Notifications

ChannelOnline will generate emails automatically when RMAs enter certain phases of the approval process. You are able to change the default behavior of all ChannelOnline generated email at: *Admin > System E-mails*

RMA notification emails are available in two sections of the System E-mails admin module – Documents and Order Processing. The following is a break down of each of the available email options. Note that many email templates consist of both an HTML template as well as a PDF template.

Documents Section – These emails are generated manually by a rep or a customer by clicking 'email' on a document

- **Customer RMA (customer) – [HTML and PDF]** – These two templates control the default content of the email your customer will generate from an RMA document sent from the ChannelOnline store site. They will find their RMAs on their 'Account Activity' tab.
- **Customer RMA (sales rep) – [HTML and PDF]** – These two templates control the default content of the email your sales team members will generate from an RMA document via the RMAs tab in ChannelOnline.
- **Supplier RMA (buyer) – [HTML and PDF]** – These two templates control the default content of the email your sales team members will generate from a supplier RMA document via the RMAs tab in ChannelOnline. This email can be delivered to your supplier / distributor to initiate the RMA process with them.

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Order Processing Section – These emails are generated automatically by ChannelOnline when certain conditions are met.

- **RMA Submitted – Pending Approval** – This email is generated when a customer submits an RMA for approval via their store site. By default, all sales team members with access to approve RMAs will be cc'd on the email. To change this behavior, remove the "Cc: <rma_approvers>" setting from the template.
- **Customer RMA Finalized Response** – This email is generated and sent to the customer who submitted an RMA, notifying them that their RMA has been approved. This email is sent as soon as a sales team member with RMA approval rights clicks the 'Approve' link on a pending customer generated RMA.
- **Customer RMA Declined Response** – Similar to the RMA Approval Notification, except this email is sent to the customer when an RMA approver declines the RMA.
- **Customer RMA Submitted Confirmation** – This email is generated and sent to the customer who submitted an RMA, notifying them that their RMA has been completed. This email is sent as soon as a sales team member with RMA approval rights clicks the 'Complete RMA' link on an approved, customer-generated RMA.

Creating Customer RMAs


In order to create a customer RMA you must start either from a submitted sales order or a new quote. The use of a new quote allows you to create a return for an item that may not have a sales order associated with it.

Creating a new RMA

To create a customer RMA from a submitted sales order, open the original sales order from the Quotes and Orders page or from the customer record. From within the document you will find the "Create RMA" link within the Create Doc options above the line items. Clicking this link will generate a new RMA document and import all of the items from the original order.

On the Create RMA Page you can deselect or select the products to be included in the RMA. If you have a large number of products that you will not be including in the RMA, you may deselect all items at once by clicking the 'Select All' checkbox in the top left header of the line item table.

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Select	All	Description	Mfr Part #	List Price	Qty	Tax	Unit Price	Total
1	<input checked="" type="checkbox"/>	Goldtouch Apple Compatible Keyboard Apple Compatible Numeric Keypad - Keypad - USB - 22 keys	GTC-MACW	\$64.95	1	1	\$46.00	\$46.00
	<input checked="" type="checkbox"/>	Goldtouch Apple Compatible Keyboard Apple Compatible Numeric Ke	GTC-MACW	\$64.95	1	Yes	\$41.4	\$41.40
Note / Reason for Return * This field is required in order to submit an RMA.								
(For INTERNAL use only. Not viewable by customer.)								
		Supplier	Supplier Part #	Description	Cost			
		 SYNNEX	1200922	THE APPLE COMPATIBLE NUMERIC KEYPAD HUB WAS CREATED SPECIFICALLY TO BUNDLE WITH	\$43.45			

The field titled "Reason for Return" is a required field. You must select a reason for returning this product prior to submitting the RMA for approval.

Additional adjustments that can be made to RMA:

- Credit Type (approvers only)
- Shipping Method
- Qty (no greater than what was on the original order)
- Unit Price (remember this will have the return fee % already deducted)
- Tax (to issue credit for the tax amount of the product)
- Shipping (if any shipping costs are to be returned)
- Handling or Restocking Fee (default is taken from the enable setup)

When all modifications to the RMA are complete, click the 'Save' link at the bottom of the page to submit and initiate the approval process. You will now be taken to the RMA document screen with a status of 'Pending'.

The following fields will be automatically calculated for you:

- Total Credit = Unit Price (original sell price minus an RMA % fee) + Tax + Shipping – Handling / Restocking fee
- RMA Loss / Gain = Original SO amount – Total Credit

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Create RMA Page

Bill To:

Ship To:

Order Options:

Credit Type: Net Terms (Credit to Account)

Shipping Method:

Carrier Account #: None

Call Tag URL:

Billing & Shipping

Line Actions

View Filters

Re-order Lines

Show Serial #s

	SO	sRMA	Mfr Part #	Qty	Tax	Price	Total
<div>1 </div> <div> <div>Axiom</div> <div>DDR3 - 4 GB - DIMM 240-pin - registered - ECC - for Cisco UCS B200 M1, B200 M2, C200 M1, C200 M2, C210 M1, C210 M2</div> </div>			AXCS-M304GB1L	1		\$58.54	\$58.54

Item Note:

Reason for Return *

Error Made By

Condition

Select one

Select one

Select one

	Supplier	Supplier Part #	Description	Cost	Stock	Profit / Pricing Method
<input type="radio"/>	Tech Data	10074709	4GB DDR3-1333 LV RDIMM FOR CISCO # N01-M	\$59.13	4	\$-0.59 (-1.00% markup)
<input checked="" type="radio"/>	SYNNEX	3295078	4GB DDR3-1333 ECC LOW-VOLTAGE RDIMM FOR CISCO # N01-M304GB1-L	\$63.09	4	\$-4.55 (-7.21% markup)

Subtotal \$58.54

?

Shipping Credit (1.0 lb...

Manual

16.006 %

9.37

Tax Credit (on \$58.54):

Taxed Subtotal: \$ 67.91

Taxable Items: \$ 58.54

Nontaxable Items: \$ 0.00

Fees: \$ 0.00

Nontaxable Subtotal: \$ 0.00

Handling or Restocking Fees: -\$ 12.00

Total Credit: \$ 55.91

Customers Creating RMAs

Your customers who have been granted access to a ChannelOnline store site may also submit RMAs for approval from the 'Account Activity' tab. They will need to locate the original order from their order history for which an RMA will be created. They will need to open the order by clicking the order number link.

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Suite 605 Irvine California 92865 United States	Suite 605 Irvine California 92865 United States	Delivery Method: UPS Ground Carrier Account #: None Special Instructions: None
--	--	--

» Ask Sales

Description	Part Number	Qty	Ship To	Tax	Unit Price	Total
Lenovo ThinkPad 10 20C3 Tablet - no keyboard - Atom Z3795 / 1.6 GHz - Windows 8.1 Pro 64-bit - 4 GB RAM - 128 GB eMMC - 10.1" touchscreen 1920 x 1200 - Intel HD Graphics - graphite black - keyboard: Spanish	20C3001ULM	1	Use Document Shippi	+	Add	No \$1,519.00 \$1,519.00

Status	Serial #	Shipped On	Delivery Method	Tracking #
Submitted (1)			UPS Ground	

Subtotal: \$1,519.00

Promotional Coupon Code: Discount (\$) 0.00 : -0.00

Tax (0.000%): \$0.00

Shipping (UPS Ground): \$10.00

Total: \$1,529.00

Actions

» Copy to Cart as New

» View Invoice(s)

» Create RMA

» View RMA(s)

» Back to Account Activity

» Send

Once the RMA has been submitted for approval, your customer will see the same details as an inside sales team member submitting an RMA for approval. As the RMA status is updated by the sales and purchasing teams, the customer's account activity page will be updated along the way.

Account Activity

Listed below are your saved carts, quotes and orders. You may view any one of these by clicking on the document number in the far left column.

Last Modified Date:	Last 90 Days ▼	Status:	RMA (All) ▼
Created By:	Created By (All) ▼		

[Filter](#)

Doc #	Type	Status	Description	Total	P.O.	Last Modified	Created By	Del
10021	RMA	Open		\$1,585.84		Oct 26, 2015 12:47 PM PDT	Rotella, Pasquale (StoreSite)	⊗
10020	RMA	Open		\$67.91		Oct 26, 2015 12:36 PM PDT	Support, CNET (SalesRep)	⊗

Found: 2 Displaying: 1 - 2 < 1 >

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Approving RMAs

RMA approvers may be notified that there is an RMA pending approval based on your notification settings. By default, the RMA approval notification email will include a link directly to the RMA in ChannelOnline. Below is an example of an approval email sent from ChannelOnline:

The following RMA has been placed on your StoreSite and needs your review:
Submitted: Sep 6, 2012 3:17 PM PDT
Company: Scotland Yard
Name: Holmes, Sherlock
Amount: \$938.02
Credit Type: Credit Card
RMA Number: 10003
Shipping Method: UPS Ground

To find out more about this order, click on
https://usm.channelonline.com/shortcut/home/Quotes/view_rma.epl?quote_id=307

Once the approver has opened the RMA document page, they can choose from the following three options:

- Approve RMA – Completes the customer RMA and allows for a supplier RMA to be created.
- Decline RMA – Denies the approval and stops the RMA workflow.
- Delete RMA – Removes the RMA from ChannelOnline.

Creating Supplier RMAs

When a customer RMA has been approved, it is time to create the supplier-facing RMA. The supplier RMA is actually a separate document, and is linked to the customer RMA in the same way a supplier PO is linked to a sales order. In order to generate the supplier RMA, navigate to and open the customer RMA document. Click the 'Create Supplier RMA' link in the Create Doc options to begin the process.

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Line Actions

Create Doc

View Filters

Re-order Lines

Edit

Create Supplier RMA(s)

1

Axiom

DDR3 - 4 GB - DIMM 240-pin - registered - ECC - for Cisco UCS B200 M1, B200 M1, C200 M2, C210 M1, C210 M2

If the customer RMA contained products sourced from several suppliers, a separate supplier RMA will be created for each. For example, the following customer RMA contained four products, each from a different supplier. As a result of creating the supplier RMA, four distinct supplier RMAs were generated and linked to the original customer RMA:

[RMAs]
Supplier RMA Link(s)
RMA #10052

Customer	Line #	SO Qty	Customer Price	RMA (s)		Description	Status	Qty	Unit Cost	Total
Holmes, Sherlock Scotland Yard Staging Grounds	1	1	\$70.20	10009	Ingram Micro	HP Deskjet 3000 - Printer - color - ink-jet - Legal, A4 - 600 dpi - up to 20 ppm (mono) / up to 16 ppm (color) - capacity: 60 sheets - USB, 802.11n - Printer - color - ink-jet - Legal, A4 - 600 dpi - up to 20 ppm (mono) / up to 16 ppm (color) - capacity: 60 sheets - USB, 802.11n	Pending	1	\$73.75	\$73.75
Holmes, Sherlock Scotland Yard Staging Grounds	2	1	\$31.50	10010	SYNNEX	HP Deskjet 1000 - Printer - color - ink-jet - A4 - 600 dpi - up to 16 ppm (mono) / up to 12 ppm (color) - capacity: 60 sheets - USB - Printer - color - ink-jet - A4 - 600 dpi - up to 16 ppm (mono) / up to 12 ppm (color) - capacity: 60 sheets - USB	Pending	1	\$30.37	\$30.37
Holmes, Sherlock Scotland Yard Staging Grounds	3	1	\$2,752.20	10012	Tech Data	HP DesignJet 510 - 42 - 42" large-format printer - color - ink-jet - Roll (42 in x 150 ft), 42 in x 74.7 in - 2400 dpi x 1200 dpi up to 3.5 min/page (color) - Parallel, USB	Pending	1	\$2,608.42	\$2,608.42
Holmes, Sherlock Scotland Yard Staging Grounds	4	1	\$907.20	10011	Azerty	HP DesignJet 130 - 24 - 24" large-format printer - color - ink-jet - A1 Plus, ARCH D - 2400 dpi x 1200 dpi - up to 4.3 min/page (mono) / up to 4.3 min/page (color) - capacity: 1 sheets - Parallel, USB	Pending	1	\$898.41	\$898.41

Back

Clicking on any of the linked RMA document numbers will take you to the respective supplier RMA. Supplier RMAs can then be emailed to your supplier / distributor by clicking the 'email' link at the bottom of the document. Recall from above that the **Supplier RMA (buyer) – [HTML and PDF]** templates will be used to generate this email.


Depending on the response from the supplier, the purchasing team member may now update the supplier RMA status to any of the following:

- Approve RMA – Completes the supplier RMA and allows for the customer RMA to be completed.
- Decline RMA – Denies the approval and stops the RMA workflow. Declined RMAs can be resubmitted.
- Delete RMA – Removes the RMA from ChannelOnline.

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Use of the Confirmation # field will help you track your supplier-provided reference / RMA number.

Supplier RMA (Approved)




Document Number: 10008
Original PO #: 10028
Date: Sep 7, 2012 10:33 AM PDT
Supplier: Tech Data
SalesRep: 
Description:
Confirmation #:

Completing RMAs

At this point, you should have a customer RMA and at least one linked supplier RMA. As each RMA is completed, you are able to update the RMA status as such by clicking the 'Complete RMA' link at the bottom of the document.

 Save
 Back

 **Complete RMA**
 View Supplier RMA(s)


 E-mail
 Print Preview
 Print

Generally speaking, you will complete the linked supplier RMAs as they are finished. Once all of the linked supplier RMAs are complete, you will complete the customer RMA. Once the customer RMA is complete, the system-generated email template **RMA Completion Notification** will be triggered.

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