



MICROSOFT DYNAMICS CRM RETURN MATERIAL AUTHORIZATION (RMA) SOLUTION



For more information, pricing, or to request a demo, contact.

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Learn More
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Armanino's managed solution for Microsoft CRM provides a comprehensive Return Material Authorization (RMA) process that supports manufacturers and distributors in RMA tracking, process automation, and reporting.

This RMA solution supports the ability to track:

- Products that are authorized for return, replacement, repair or simply unwanted products.
- Material movements
- Sent loaner products
- Advanced Placements
- Selection of the appropriate return location for the product

Workflow notifications and reporting included within this solution:

- Notifications for RMA's Created
- RMA Received
- RMA Timeout for product not yet received
- Status update notifications on RMA progress

The RMA entity within this solution is linked to a Case and an Account; it also requires a Contact to be identified. Additional fields allow Customer Service Representatives (CSRs) to enter in a return address that differs from the Contact's regular shipping address. If a CSR indicates a "Ship to Facility," this information will also be included in instructions sent to the customer.

The RMA Solution from Armanino supports child records termed "RMA Item." These items enable several items or components to be processed within the same RMA.

Armanino is a 2012 Microsoft Dynamics Inner Circle member, ranked in the top 1% of partner in the world as a value-added reseller (VAR) and implementation partner for Microsoft Dynamics CRM, AX and GP, SharePoint and Microsoft Office 365.

Description of Built-in RMA Solution Workflows

"RMA Created" (confirmation) – Upon the creation of a new RMA, this workflow waits 30 minutes (to give the CSR entering the data a chance to correct things, if necessary) and then sends an email to the customer Contact confirming the RMA. This email includes the RMA #, the address of the Ship to Facility preceded by the Attn or Ref line, and any other instructions needed by the customer.

"Update RMA Issued Date on Email Sent" – This is triggered by the Confirmation email which is created by the workflow mentioned above. When the email's status changes to SENT the field "RMA to Customer" is updated with the current time.



“RMA Timeout not Received” – This workflow is triggered by the creation of any RMA, it waits 31 days and then if the status of the RMA is still not changed from “Entered,” it will send a reminder email to the customer that the materials have not been received.

“RMA Received” – When the Status of an RMA changes to “Received,” an automated email is sent to the customer confirming that their package was received.

Once an RMA is created workflows will trigger the automation of email alerts. Additional workflows may be configured to trigger off changes to the RMA stage, thereby assigning RMA ownership to

teams or forwarding it to a workgroup queue.

About Armanino

Armanino (www.amllp.com/dynamics) has achieved dual Gold Certified Partner status for both Enterprise Resource Planning (ERP) and Customer Relationship Management (CRM). As a Gold Certified Partner, Armanino Consulting has demonstrated a notable level of industry expertise in selling and implementing Microsoft Dynamics software, providing consulting services and support, and achieving a high-level of customer satisfaction.

RMA Features and Screenshots

RMA Form

The RMA Form is the top level form integrated with Microsoft Dynamics CRM Cases. From any Case, an RMA can be created, tracked and managed to resolution.

The screenshot displays the RMA-5012 form in Microsoft Dynamics CRM. The form is titled "RMA : INFORMATION" and "RMA-5012". It is divided into several sections: "General", "Resolution", "Comments", "Return to Customer Address (if different from Contact)", and "RMA Items".

General Information:

Account	Blue Yonder Airlines	RMA Stage	Entered	Created On	3/28/2014
Contact*	Maria Campbell	RMA Type	Replacement	RMA to Customer	--
Case	Damaged during shipment	Attn or Ref Line	Attn: Keith	Date Received	--
Original Sales Order	O87643	Ship to facility	Southern California	Date Shipped	--
Repair Sales Order	--	Owner*	David Meharg	Date Closed	--
				RMA Number	RMA-5012

Resolution:

Credit Amount	--	Tracking Info	--
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Comments: --

Return to Customer Address (if different from Contact):

RMA Items:

Model	Serial # ↑	A/R?	Labor Hour...	Assigned To	Owner	Status Reason
Labor, Parts Assembly	54983212	No		In-House	David Meharg	Active
Switching Module (<100)	657812	No		In-House	David Meharg	Active

RMA Item

Diagnostics and repair of each item is managed at the “RMA Item” level. Each “RMA Item” can accommodate issue tracking, quality control dates and technician assigned, repair dates and technician assigned, root cause and the logging of labor hours and work done. This form is streamlined and hides unnecessary options unless related dropdowns are selected, providing CSR's with a straightforward interface.

HOME | SERVICE | RMA | 54983212 | David Meharg AMGP

+ NEW DEACTIVATE DELETE ASSIGN SHARE

RMA ITEM : INFORMATION
54983212

Model* Labor Parts Serial #* 54983212 RMA* RMA-5012

RMA

Product Information

Product*	Labor Parts Assembly	Warranty*	Under Warranty	RMA*	RMA-5012
Serial #*	54983212			Loaner?	<input type="checkbox"/>
Problem*	Frayed Insulation				

Repair Information

Assigned To	In-House	Labor Hours	--	Disposition	Repair
Date To QC	3/24/2014	Date To Repair	3/28/2014	Category	Workmanship
Date QC'd	3/26/2014	Date Repaired	--	Root Cause	--
QC'd By	BW	Repaired By	--		
Work Done	--				

History and Attachments

Status **Active**

Active

Loaner Option

If the “Loaner” checkbox is ticked, a hidden “Advanced Replacement” section is exposed to help manage Loaners and Advanced Replacements.

RMA ITEM : INFORMATION
54983212

Model* Labor, Parts | Serial #* 54983212 | RMA* RMA-5012

RMA

Product Information

Product*	Labor, Parts Assembly	Warranty*	Under Warranty	RMA*	RMA-5012
Serial #*	54983212			Loaner ?	<input checked="" type="checkbox"/>
Problem*	Frayed Insulation				

Repair Information

Assigned To	In-House	Labor Hours	--	Disposition	Repair
Date To QC	3/24/2014	Date To Repair	3/28/2014	Category	Workmanship
Date QC'd	3/26/2014	Date Repaired	--	Root Cause	--
QC'd By	BW	Repaired By	--		

Repair Facility

Multiple “Repair Facilities” may be configured. When one is selected on the RMA form, that facility’s address will be used in the automatic confirmation correspondence with the customer.

SETTINGS | Repair Facilities | Southern California | David Meharg AMGP

+ NEW | DEACTIVATE | DELETE | ASSIGN | SHARE

REPAIR FACILITY : INFORMATION
Southern California

General

Name*	Southern California	City	Yorba Linda
Ship to:	Receiving Manager	State	CA
Street 1	44 Del Ray Road	Zip Code	92885
Street 2	By door 2		

Comments

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