RMA and "Case Management" System for XA

General Overview

The RMA and Case Management System for XA controls the processing and tracking of customer reported problems with orders, shipment issues, and warranty. A "case" may require issuing Return Material Authorizations, Credit Memos, or both. It may involve dealing with customer complaints. In addition to customer reported problems, "cases" are also used to track RMA's for Customer Supplied Material, product Re-builds, and items sent back for Restock.

The problem: How do you deal with various situations (cases) to …
- efficiently track Return Material Authorizations?
- process credit requests using approval rules with "Limits of Authority"?
- handle cases (complaints or issues) that include multiple items and dispositions?
- enforce accurate Status settings for each item or incident of a "case"?
- provide broader access to case information for greater awareness?
- leverage XA data for Order, Shipment, and Item information?
- manage "Action Items" for soliciting information and assigning duties?

The Answer: **The RMA and Case Management System for XA**

Description	Action Items	Files	E-Mail

		Case Number:	**CA07543**
Account Name:	AMG CORP.	Type:	Warranty
	40158 E. STRATFORD AVE APPLETON, WI 54912-1279 UNITED STATES Price Book ID: O6	Case Status:	Pending Return of Item
		Case Owner:	Julie Walters
Contact Name:	TIMOTHY CAMPBELL	Case Origin:	◉ Phone ○ E-Mail ○ Other
Telephone Number:	920-341-7765	Location:	◉ Lexington ○ Moorestown
E-Mail Address:	tcampbell@amgcorp.com	Return Freight Authorized:	○ Yes ◉ No
FAX Number:		Date Created:	Jan 21, 2015 3:54 PM
		Date Closed:	
Case Subject:	Leaks	Department Responsible:	-Select-
Statement of Problem:	Tim emailed to say that he had an RG 2.5" that is leaking that he would like to send in for evaluation, and if warranty, repaired or replaced		

Row	Order Information	Item Information	New References	Status / Disposition	
1.	Order #: 576859 P.O. # 313603 Invoice #: 595432 Date Ship: Jan 31, 2014	Serial #: Item #: RG50443TH Seq: 100 Description: 2.5"CD RG,STD TL4-15 W/REL Sales Group: ;	Qty Affected: 1 Price: $1,334.32 Qty Received: Date Recvd:	Quote #: Order #: P.O. #: CAR #:	Warranty: ○ Yes ○ No Status: -Select- Root Cause: -Select-

Benefits—Problems Are Solved with the RMA/Case Management System

- Automatically retrieve Customer Order information direct from XA
    - COM Order Number, Customer Number; Name; PO Number, Invoice Number, Item Number, Item Description, Quantity Ordered, Price, Shipments, etc.
- Establish a Case "Owner" based on the Case Type for ultimate responsibility
- Process multiple items independently on one Case with their own Status choices
- Easily see XA Inventory transactions within each Case
- Send an RMA PDF traveler document directly from the Case
- Submit and track Credit Requests through a controlled approval path
- Simply associate pictures and reports to the Case for returned goods
- Forward all relevant e-mail correspondence directly to a Case for reference
- Attach unlimited files to the Case to support the process
- Create your own custom reports with the Case Management Query Tool

Select affected Items directly from the XA Order:

CASE

Order # 576859
< Click a Shipment to Select an Item for this Case >

Sold To:	Ship To:
AMG CORP.	**AMG CORPORATION**
BOX 332	40158 E. STRATFORD AVE
APPLETON, WI 54915	APPLETON, WI 54912-1279
USA	UNITED STATES
SCOTT	
Ph: 920-341-5606	Ph:
Fx:	Fx:

P.O. Number:	313603	Date Ordered:	Jan 24, 2014
XA Customer #:	21854601	Date Shipped:	Jan 31, 2014
Sales Rep:			

Items:

Line	Item	Description	Qty Ordered	Price	Qty Shipped		
100	RG5044TH	2.5"CD RG,STD	2	1334.322	2		

Shipments:

Date Shipped	Sel	Shipment	Line	Item Number	Ship Qty	MO Number	Carrier	Invoice
Jan 31, 2014		620582	100	RG5044TH 2.5" RG,STD BACKLASH,	2	M131430	UPS	595432

Comments:

No more spreadsheets and double-keying. No more losing track of returned goods. No more wasted time trying to credit a returned good.

Call MKA to learn more.