

**Volume 4
Issue 2
May 2007**

For Your Information

Sage Summit, the annual conference for Sage Software customers, will be held this year in Chicago, during the first week of November. You'll learn about software, connect with other users, and generate lots of new ideas for growing your business. Go to www.sagesummit.com for the latest conference information, including great rates at preferred hotels.



Streamline Returns With The New Sage Accpac RMA Module

Most organizations these days are finding the marketplace more crowded than ever. Competition for new customers gets stiffer every day, and you must work harder than ever to keep existing customers happy.

An inevitable part of providing good customer service is accepting returns. Reasons for customer returns run the gamut from the customer changing their mind to a defective item. Accepting returns is costly, but if properly managed, you can keep the administrative costs to a minimum while still making your customers happy. There is a new tool for Sage Accpac ERP that does just that—the Return Materials Authorization (RMA) module.

Not only will the RMA module streamline the process of authorizing and receiving returns, the seamless integration with the other Sage Accpac modules keeps your inventory accurate and provides a complete workflow for items to be repaired, replaced, or returned to the supplier. Full automation of the process assures customer returns are turned around rapidly. Even your cash flow can improve when returns are handled efficiently. Let's learn more.

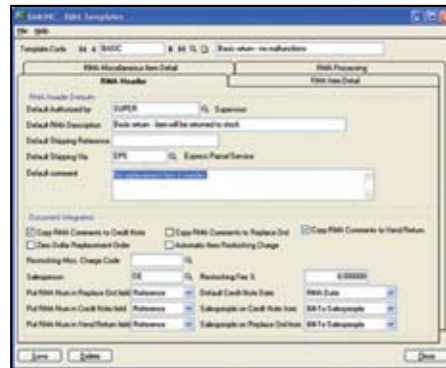
Centralized Returns Management

With RMA integrated, you can completely eliminate gaps in product tracking. Each activity related to a particular item is stored in your Sage Accpac system, from the initial purchase order all the way through to a return.

The power of the RMA module starts with a customer's request to make a return. You can generate return authorization documents to acknowledge the return and provide personalized instructions for the customer. When creating the return authorization, the

system automatically assigns a unique number that is tracked through all the activities associated with the return.

Even when a customer is returning multiple items on an order, your customer service staff can process the return quickly by automatically generating the RMA from the original customer invoice, then removing the items that are not being returned. If a customer is returning items sold on multiple invoices, the RMA module can handle that on a single RMA document. Serial and lot tracking integration allow you to accurately record the product being returned.



The RMA entry screen provides one-click access to related tasks.

Continued on Page 2

Suite 490, Chancery Court
220 - 4 Street South
Lethbridge, Alberta T1J 4J7
(403) 328-8188
(403) 381-8057 fax
info@asyma.com
www.asyma.com



Streamline Returns With New Sage Accpac RMA Module CONTINUED

Once you receive the products being returned in the RMA document, each item will require further action. If you are issuing a credit, you can generate an Order Entry (OE) Credit note with the click of a button. If you are sending a replacement item, you can create the OE replacement order right from the RMA screen. You also can flag the item to be repaired and returned to the customer, or automatically create a purchase order return to send it on to your supplier for replacement or repair. You can do all these things right from the RMA entry screen with just the click of your mouse.

Track And Bill For Repairs

Items being returned may be under a warranty provided by either your own organization or a supplier. The RMA module can handle both of these situations. If the item is under warranty with the supplier, you can quickly and easily create a purchase order return document to send to your vendor.

In some situations, you may need to send the product out to a third-party repair agent. The RMA module keeps track of these agents and their designated repair facilities, so you never lose track of a customer's product.

For items that have been damaged in shipping, RMA offers a centralized place to record and track claims made against insurance with shipping carriers.

Tailor RMA To Your Company

A robust selection of setup options allow you to tailor the RMA module to your unique organization. RMA documents can be formatted to fit your needs, and you can define a default expiration period for RMAs.

User-definable status codes allow you to specify both internal and external status codes that make sense for your company and products. You also can add any custom fields you need to tailor the system to match your business processes. Crystal Reports® is built right into the RMA module, making it easy to create your own custom reports.

For security and control, you can designate the employees who are allowed to authorize returns. You also can store the name of the

main contact person who handles returns for internal reference.

Setup options also allow you to define return policies for your items and any restocking fees or miscellaneous charges to be applied. You can even specify which lines of an RMA should generate automatic replacement orders.

Reason Tracking And Analysis

Perhaps the greatest benefit of an automated RMA system is the insight you can gain into the reasons that items are being returned. Tracking and analyzing the reasons for returns will allow you to take corrective action to prevent future incidents. The Fault Analysis report supplies the information you need to quickly identify product faults and take corrective action to eliminate repeat returns.

Here are some examples of the actions you might take based on the insights you gain:

- ▶ You may discover that a large percentage of defective items come from a particular vendor and change your supplier as a result.
- ▶ If a manufactured item is often returned for defects in the finish, you might replace tools or materials involved in the process.
- ▶ If a particular item is returned with greater frequency than others, but for no specific reason, you may choose to remove it from your product line.

Effective Reporting

The RMA module includes all the reports you need to manage returns.

- ▶ The Credit Note report allows you to evaluate the revenue impact of returns.
- ▶ Customer and Item Return Rate reports allow you to identify problem customers and items and take corrective action.
- ▶ The External Status and Workflow Stage report provides accurate tracking of items sent out for repair.
- ▶ The Open/Closed Status report shows you the RMAs outstanding.

Fraud Prevention

The RMA module contains built-in controls to prevent abuse of the system. The system checks to see if an item has already been returned, or if a Credit Note has already been issued, ensuring the same item is not credited twice.

A Powerful Tool For Your Business

If a major part of your business is the sale of products, you will find the Sage Accpac RMA module to be the most important tool you add to your business management system this year. The addition of this one tool can enable you to:

- ▶ Enhance customer satisfaction with quick response to all return and repair requests
- ▶ Improve accuracy and control of your valuable inventory
- ▶ Increase your cash position with better management of damaged goods claims with suppliers and shippers
- ▶ Increase staff productivity with automated processes
- ▶ Improve the quality of your product line using the insight gained from the reasons for returns

If you would like to process claims faster, track inventory with greater accuracy, and optimize customer service performance, no matter how many returns appear at your door, give us a call to schedule a demonstration of the RMA module for Sage Accpac. ☆

Tips & Tricks

Faster Vendor Activity Report

If you Include Pending Amounts on the Vendor Activity report, it may take several minutes for the system to search for pending amounts.

If all transactions are posted, you do not need to check this box. If you don't have any pending transactions, or do not need to show pending amounts on the report, make sure the box is not checked. The report should now generate in a matter of seconds. ☆