Smith RMA Module v.2.10

Users' Manual

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I.   Introduction

Smith RMA is designed to provide you with the ability to handle the process of Return Merchandise Authorizations (RMA's) for your online storefront, also referred to as: Return Goods Authorization (RGA), or return merchandise agreement.
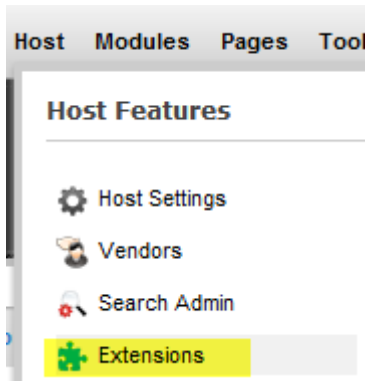
Smith RMA is fully integrated with Smith Cart and provides the following features:

- Designed for any type of vendors
  - Manufacturers
  - Distributors
  - Suppliers.
- Business to Business (B2B) Returns Processing.
- Business to Consumers (B2C) Returns Processing.
- Support for Single, or Multiple items per or RMA Case
- Paperless returns processing.
- Automatic email notifications

II.   Installation

The Smith RMA module is delivered as a standard DNN installable zip or PA (Private Assembly). You install the Smith RMA module just like you would install any other DNN module. Before installing any module it's a good idea to back up your DNN database and DNN installation folder. This is very important, as you can always roll back to previous status easily if installation goes wrong.
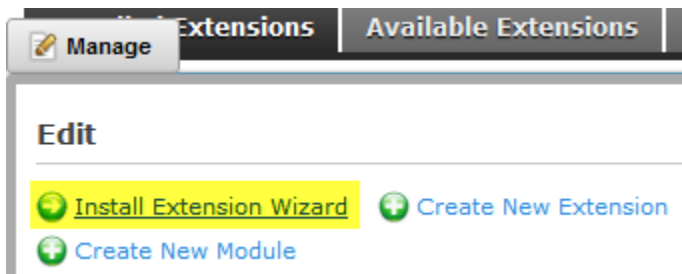
Step 1 - Log in to your DNN site using a Host account. From the DNN host menu, select the Module Extensions link to install the module. In order to do that, you should login as host, or an administrator account with module upload permissions.

Figure 1 - DNN Host Menu

You can reach Module Extensions from the Host menu item as shown in figure 1 above. Install the new module from the Host -> Modules menu in DNN.

Step 2 - Install New Module

Figure 2 - Module Extensions screen

On the Module Extensions screen (figure 2), choose Install Extension Wizard from the actions menu. This action menu can be either on the left or right side of the main container. It depends on the layout of your current DotNetNuke skin.
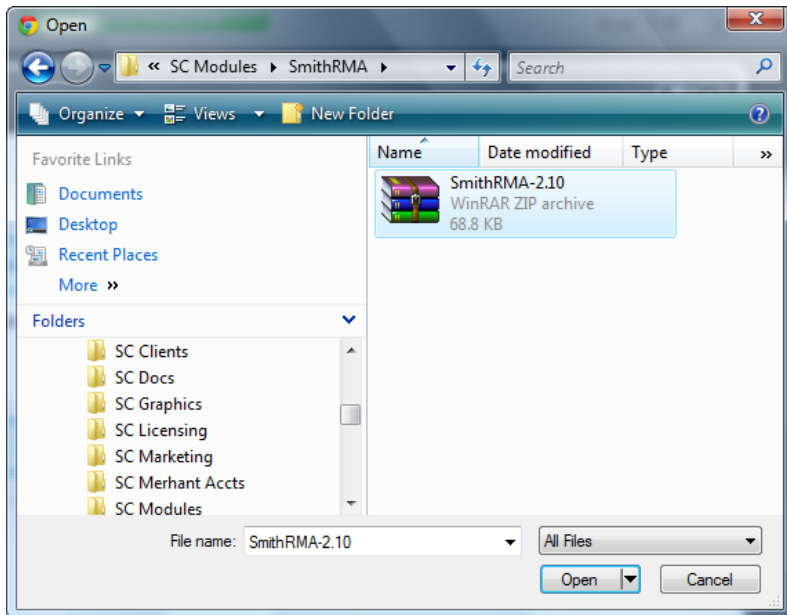
Step 3 - Browse the ZIP File

Remember the place where you saved the module ZIP file you downloaded? Then browse it.

Figure 3 - Browse for the module

Step 4 - Pick the file

Figure 4 - Pick your module

After you accessed the file, choose it and click Next.

Step 5 - Add the File

The file (with complete physical location) appears in the textbox. Check it once again and then click Next.

Figure 5 – Install New Module

Step 6 – Install it now!

When you see it appear on text area box, click Next and go through the DNN install module wizard.

Step 7 - Module Installed

If you do not see any error messages, it means that the module is installed correctly.
Click the Return link.

Step 8 – DNN Install New module log

When everything is OK, you should see the Smith RMA module on the Module list on upper panel. Now you can use the module.
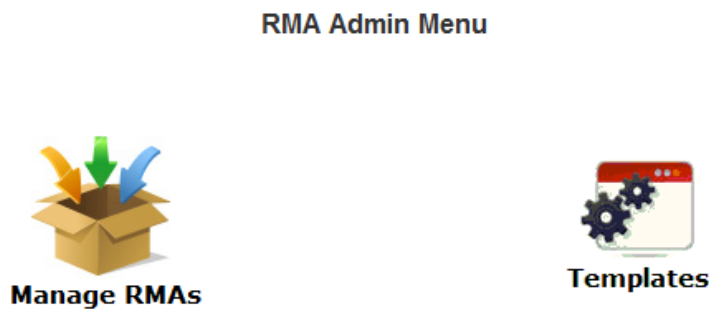
Step 9 – Create a new page in your DNN portal and add the Smith RMA module to the page.

III.   Setup and Configuration

The Smith RMA module is useful for tracking and recording product returns. After you have installed the module, navigate to the page where you added the module and you will see the RMA Admin Menu as follows:

RMA Admin Menu

Manage RMAs   **Templates**

A.   RMA Management

To add or edit an RMA click the "Manage RMAs" button and the Manage RMA screen will be displayed. If RMAs have already been added, a grid will be displayed that lists the RMAs and allows you choose and configure the following options:

- Add RMA
- Edit RMA
- Delete RMA

<< Back	Manage RMA	Add RMA

Manage RMA

Search By: Product Name ▾ [   ] Search   Show All

	Company Name	First Name	Last Name	Address	City	Country	State/Region	Postal Code	Email	Phone	Return Reason	
Edit RMA	SC	Smith	Tester	20 Kendall,	Laguna Niguel	US	CA	92677	smithconsultingtest@gmail.com	9495555555	Damaged Items	Delete

1. Adding a New RMA

To add a new RMA, click the "Add RMA" button on the top button bar and the following add RMA screen will be displayed:

Figure 6 - Add RMA Screen

Fill out all the data input fields on the add RMA screen above.

Field Definitions

RMA Number – Enter the RMA number that you would like to associae with this return.

Order ID – Enter the original Order ID for the item being returned.

Company Name – Enter the name of the company that is returning the item(s).

Shipping Information (Name, address, etc.) **–** Enter the user's shipping information as it appeared on the original order.

Contact Information – Enter the user's name, email address and other contact information that is associated with this return.

Reason for Return – Select the reason the item is being returned from the dropdown list.

Notes – Enter any special notes or instructions for the RMA in this box.

Next, enter the items from the original order being returned. Notice that the product dropdown list is automatically populated with all your products from your Smith Cart store. Select the product being returned from the product dropdown list. After you select the product from the dropdown list the sku, unit cost and line total fields in the grid will be automatically populated from the Smith Cart products table.

Figure 7 - RMA Order Detail Screen

To save the RMA line item click the "Add" button on the left hand side of the grid.

Next, you can add shipping, handling, and surcharge amounts to the RMA on the following screen and lick calculate:

Figure 8 - RMA Detail Screen

After you are finished entering all your RMA data, click the "Add RMA" button at the bottom of the screen and the RMA will be saved to the database and listed on the main RMA management screen as follows:

2. Editing an RMA

To edit an RMA, click the Edit button found on the RMA management screen as seen in the picture below:

The following screen allows you to edit every aspect of the existing RMA. When you are finished, click the Update RMA button at the bottom:

<< Back | Manage RMA | Add RMA

Edit RMA

RMA Number: * `9733`

OrderID: `3469`

Company Name: * `Smith Consulting`

First Name: * `Kelli`

Last Name: * `Wetherell`

Address: `20 Kendall St`

Address 2: ` `

City: `Laguna Niguel`

Country: `United States`

State: `California`

Postal Code: `92677`

Email: `kelli@smith-consulting.com`

Phone: `9498293020`

Fax: ` `

Reason for Return: `-Select-`

Notes: ` `

	Sku	Product Name	Qty Returned	Unit Cost	Line Total	
Edit	12345	Dead Island	1	$56.00	$56.00	Delete
Add		-Select-	1			

Sub Total: $56.00

Discount: ` `

Tax: ` `

Handling Cost: `20`

Shipping Cost: `10`

Surcharge: `5`

Calculate   Return Total: $91.00

Cancel | Print RMA | Update RMA ←

3. Deleting an RMA

To delete an RMA, navigate to the RMA management screen. Then, click the delete button:

	Company Name	First Name	Last Name	Address	City	Country	State/Region	Postal Code	Email	Phone	Return Reason	
Edit RMA	SC	Smith	Tester	20 Kendall,	Laguna Niguel	US	CA	92677	smithconsultingtest@gmail.com	9495555555	Damaged Items	Delete
Edit RMA	Smith Consulting	Kelli	Wetherell	20 Kendall St,	Laguna Niguel	US	CA	92677	kelli@smith-consulting.com	9498293020	0	Delete

The RMA is then deleted from the management screen.

	Company Name	First Name	Last Name	Address	City	Country	State/Region	Postal Code	Email	Phone	Return Reason	
Edit RMA	Smith Consulting	Kelli	Wetherell	20 Kendall St,	Laguna Niguel	US	CA	92677	kelli@smith-consulting.com	9498293020	0	Delete

B. RMA Templates

RMA templates allow you to manage the printable RMA form that can be printed or emailed to the customer or saved for your records.

1. Adding an RMA Template

To manage the RMA Templates please follow the steps as outlined below:

Step 1: From the RMA Admin Menu, click the "Templates" button.

Templates

After you click the "Templates" button the following screen will be displayed:

Click Add RMA Template and you will see the following screen:

Step 2: Customize the template layout and contents to your desired layout using the rich text editor.

Step 3: Click the Submit button to save the Template

a)   RMA Template Tokens

The following tokens can be entered in RMA Templates to customize your RMA form.

Note: All tokens must be entered in uppercase and be enclosed in square brackets as shown below.

RMA Tokens	
Token Name	**Description**
RMA Header Tokens	
[RMAID]	The ID assigned to each RMA in the database
[RMANUMBER]	RMA Identification Number
[ORDERID]	Original Purchase Order ID
[RETURNREASON]	Reason For Return
Customer Tokens	
[CUSTOMERCOMPANYNAME]	Customer Company Name
[CUSTOMERFIRSTNAME]	Customer First Name
[CUSTOMERLASTNAME]	Customer Last Name
[CUSTOMERADDRESS1]	Customer Address, Line 1
[CUSTOMERADDRESS2]	Customer Address, Line 2
[CUSTOMERCITY]	Customer City
[CUSTOMERZIP]	Customer Zip Code
[CUSTOMERCOUNTRY]	Cusomer Country
[CUSTOMERSTATE]	Customer State
[CUSTOMERPHONE]	Customer Phone Number
[CUSTOMEREMAIL]	Customer Email
RMA Detail Tokens	
[PRODUCTSKU]	Product Sku
[PRODUCTNAME]	Product Name
[QTYRETURNED]	Quantity Returned
[UNITCOST]	Unit Cost
[LINETOTAL]	Line Total
Sub-Total Tokens	
[SUBTOTAL]	Subtotal Amount
[RETURNTOTAL]	Returned Total Amount

2. Editing an RMA Template

In order to edit an existing template, click "edit" as seen in the screen shot below:

Be sure to hit the "Update" button when you are done making changes to your template.

3.   Deleting an RMA Template

In order to delete an RMA template, hit the "Delete" button:

You will then receive a confirmation that your template has been deleted:

IV.   Extensions/Customizations

The Smith Autoship module can be extended to fit your business requirements. If you're interested in receiving a quote for customizations please request a quote using the following link:

http://www.smith-consulting.com/services/requestaquote.aspx