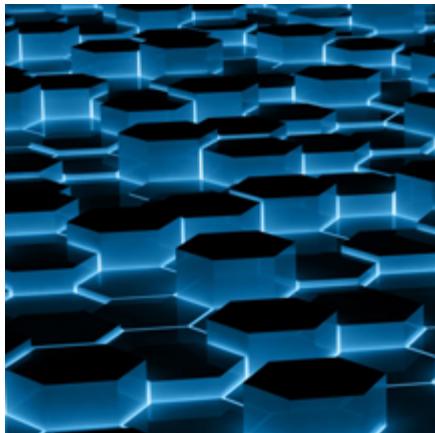




# MICROSOFT DYNAMICS

## RETURN MATERIAL AUTHORIZATION (RMA)



Armanino's managed solution for Microsoft Dynamics 365 (and prior versions of Dynamics 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.

### 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.

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

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**“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 works with growth-oriented companies to simplify customer data management and streamline business development processes. As one of the world's leading integrators of Microsoft Dynamics 365, we have the background and experience to integrate our product with virtually any business-critical system. In fact, our CPA roots give us exceptional credentials to synchronize your customer data with ERP and financial systems. At Armanino, we deliver the tools you need to focus on your customers and grow.