

SalesForce SOP: Reship orders in SalesForce

12/31/2024 11:52 am CST



Who is this for: Anyone needing to create RMA or reship order in SalesForce



Objective: This will create an RMA and or a replacement order in SalesForce

Article information and steps.:

Issuing RMA in Sales Force.

- Open the order that needs an RMA and select the Issue RMA button.
- Select Return Reason from the drop-down. Choose Never Worked if reason is not listed and add notes to Internal Comment box with your initials.
- Select the Resolution–Replacement, Exchange or Refund.
 - o For Replacement, zero out the refund amount. Change Shipping Carrier/Class to FedEx Ground. Add any notes with your initials to Internal Comment. Create RMA.
 - o For Exchange, enter the SKU of the product they are wanting in exchange. It is helpful if you know this before creating the RMA but you can use the lookup icon next to the box if you do not know. Adjust refund amount to zero or to whatever amount needed if exchange is less than original item. Change Shipping Carrier/Class to FedEx Ground. Add any notes with your initials to Internal Comment. Create RMA. Remember to process any refund, if needed.
 - o For Refund, check that amount to be refunded is correct. Add any notes with your initials to Internal Comment. Create RMA.

Damaged or re-ships (no product coming back)

- Issue the RMA in Sales Force.
- Under the RMA Lines tab, open the RMA line number for the order you are working on. Note: if multiple items are being returned/refunded, there will be multiple RMA lines.
- Mark the status as “Received”. If multiple items, select all the items and apply the status to all selected records by double-clicking on the status field.

- Find the replacement order to send to SV and Ship Station. Change the order status from Pending to New. Make sure the Payment Status shows Cleared before sending.
- If the reship was our fault – wrong product or quantity, damaged or lost – select to override fulfillment fee. Change Bill Fulfillment fee to Rivrhub and choose the appropriate reason for the return.

Damaged and refund only (no product coming back and no re-ship)

- Issue the RMA and mark the status as “Received”
- Then follow the appropriate refund instructions for that channel.

Actual return for refund

- Issue the RMA.
 - Once received, mark the status as received.
 - Issue the refund manually per the instructions for that channel.
-