Receive RMA

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Overview

The Return Merchandise Authorization (RMA) process is the recommended workflow for managing order returns. RMAs allow you to track and manage returns from the initial customer contact to the receipt of the returned items in your warehouse. You can utilize the Skustack Admin portal to create RMAs and effortlessly receive existing ones through the Skustack application.
If you use Skustack as a standalone product, contact your onboarding representative for assistance with your company's RMA settings configuration.

Receive RMA Module

The **Receive RMA** module is located within Skustack's **Receiving** tab. Here you can receive RMA items into your warehouse bins and consequently update the RMA's status. You may want to receive returns in non-sellable bins until the items have been inspected by management, or receive and transfer them to separate SKUs in suitable conditions (e.g. Used, Open box, etc.) right away.

Search RMAs

You can search for RMAs in one of six ways:

- **Search By RMAID** – Search by the internal RMA ID
- **Search By OrderID** – Search by the internal Order ID.
- **Search By Tracking** – Search by the tracking # for the RMA (not the order).
- **Search By OrderSourceRMAID** – Search by the Order Source RMA# field on the RMA details page.
- **Search By OrderSourceOrderID** – Search by the Channel order ID of the related order.
- **Search All** – Search for all RMAs. You can filter by:

  Status

  Defaults to all. You can choose from one of the RMA statuses:

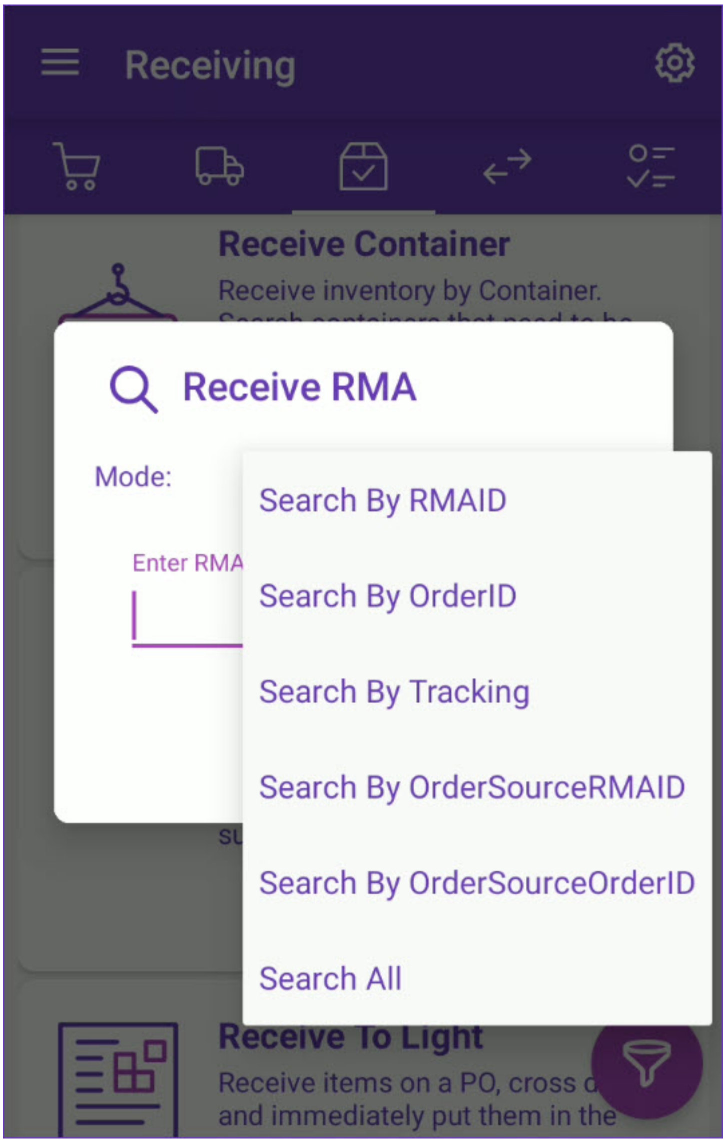
  - **All**
  - **Open**
  - **On Hold**
  - **Processing**
  - **Closed**

  Reason

  List of available RMA reasons. Defaults to all.

  SKU/UPC/Alias

  Filters by a specific product, UPC, or alias.



Receive RMA Items

Follow the steps below to receive RMA items:

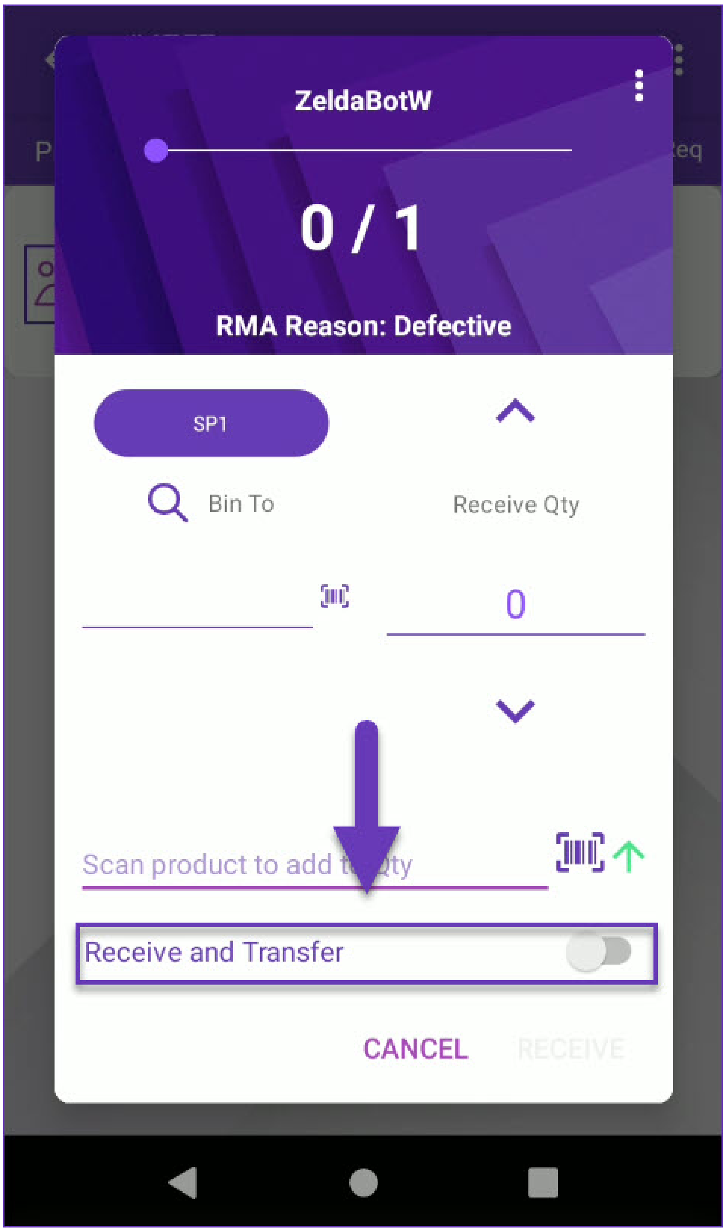
1. Navigate to **Receiving** tab > **Receive RMA** module and open the desired RMA.
2. The return product quantities will load.
3. Swipe down to see the total number of products on the RMA and the number of the received units.
4. Swipe the items to the left to reveal shortcuts to other actions:
   - **Bins** – Tap the icon to see all bins where the product is stored (bins will show only if you're logged into a bin-enabled warehouse).
   - **Info** – Tap to be directed to the Product Info module.
5. Tap the Select Product Identifiers icon to choose the preferred SKU identifiers to display – **UPC**, **Aliases**, and **Product Name**.
6. The three dots menu in the upper right corner of the screen leads to additional actions such as:
   - **Notes** – Add and view custom note entries for the RMA.

        - You can choose employees to tag in an **RMA Note**. Such users will receive it as a notification in the Skustack Admin Portal.

    - **Take Photo** – Add a photo of the item to the RMA documents.
    - **Print RMAID Label** – Trigger the printer connected to your device to print a label with the RMA ID.
    - **Print Product Barcodes** – Trigger the printer connected to your device to print labels with the product's barcodes.

7. Scan a product, or select it manually. The receive dialog will open.
8. Scan/enter a bin, or select from the list of suggested bins. It is recommended to receive returns in non-sellable bins until the items have been inspected.
   Enable the **Use Receiving Bin** setting in Skustack to only allow receiving into a receiving bin. You can then use the PutAway workflow to transfer inventory from the temporary receiving bin to permanent bins on the warehouse shelf.
9. Scan the units to receive them, or adjust the number manually.
10. If the Lot Number workflow is enabled for your company and the product is set as expirable then you must select a Lot Number before receiving it. Tap on **More Lot/Expirys** to view existing or add new lots.
11. To transfer the received quantity to another item (for example a product with a "used" or "open box" condition), tap

the **Receive and Transfer** toggle.



If enabled, the [Sku to Sku Transfer module](#) will open as soon as the quantity is received, and the source product will be prepopulated with the received item and quantity.

12. Tap **Receive**.
13. Repeat for all SKUs in the RMA, if applicable.
14. The RMA received status will update, as well as the quantities received.

To put inventory away from your receiving bin into one of your regular bins, follow the PutAway workflow described here.

Manage RMA

The Skustack Admin portal enables you to easily create new RMAs, search for existing ones, monitor their progress, export them to Excel, and more.

Create RMAs

You can create RMAs either individually through a fully shipped order or in bulk via a file import.

Individually

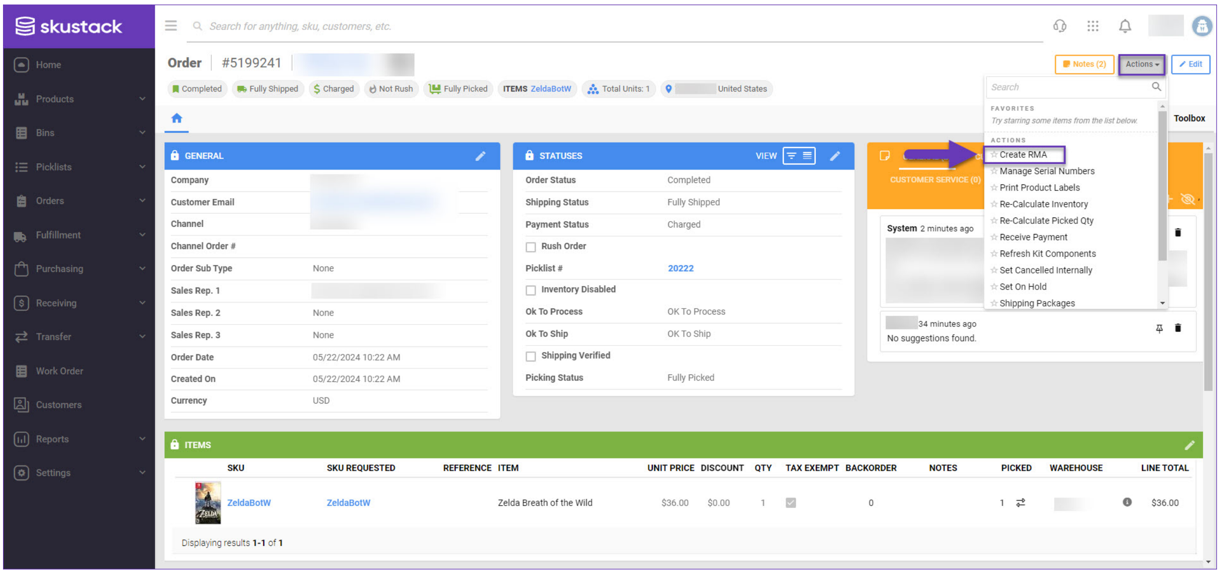
Whenever an item from a fully shipped order should be returned, an RMA can be created in a few simple steps:

1. Navigate to the Skustack Admin portal at **https://xx.skustack.com** (replace “**xx**” with your **server ID** or **team name**).

2. Enter your login credentials.

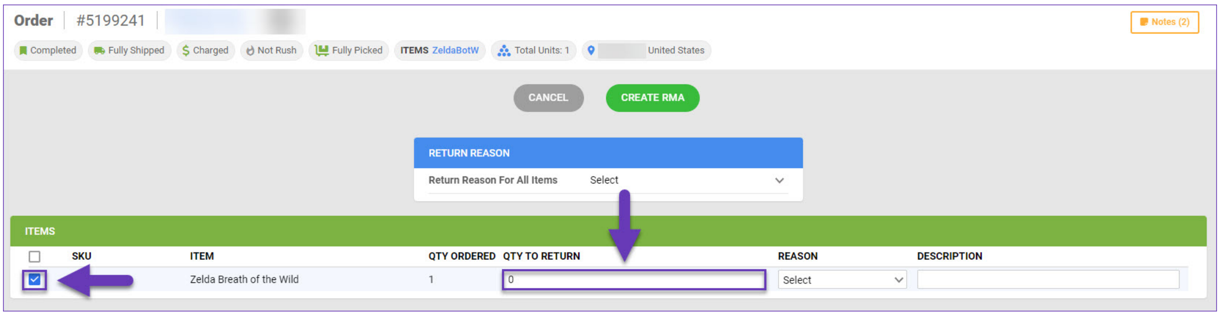
3. Click **Orders** > **Manage Orders** and open the desired Orders Details page.

4. From the **Actions** menu, select **Create RMA**.

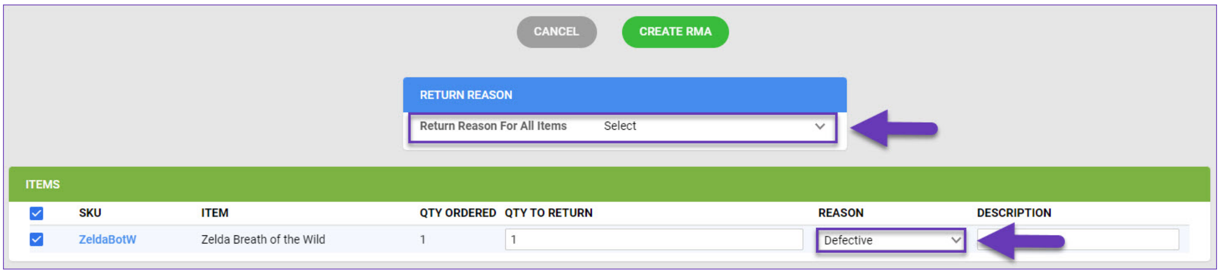


5. In the **Items** panel, check the boxes of the products that should be returned.

6. Enter a **Qty to Return**.

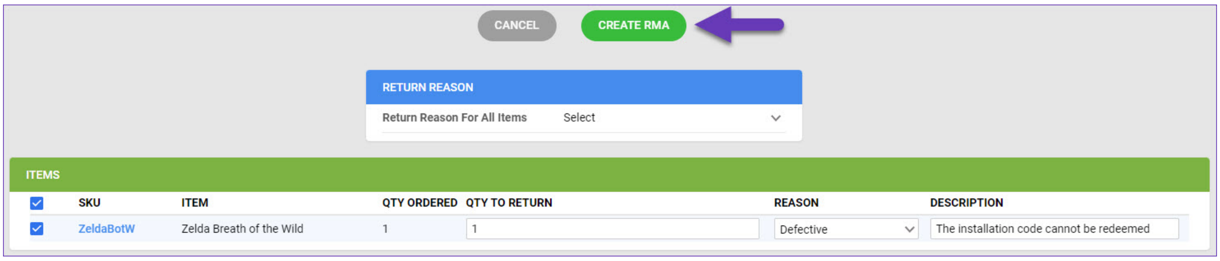


7. Enter a **Reason**. You can do this per item or select the **Return Reason For All Items**.



8. Optionally, enter a **Description**.

9. Click **Create RMA**.



In Bulk

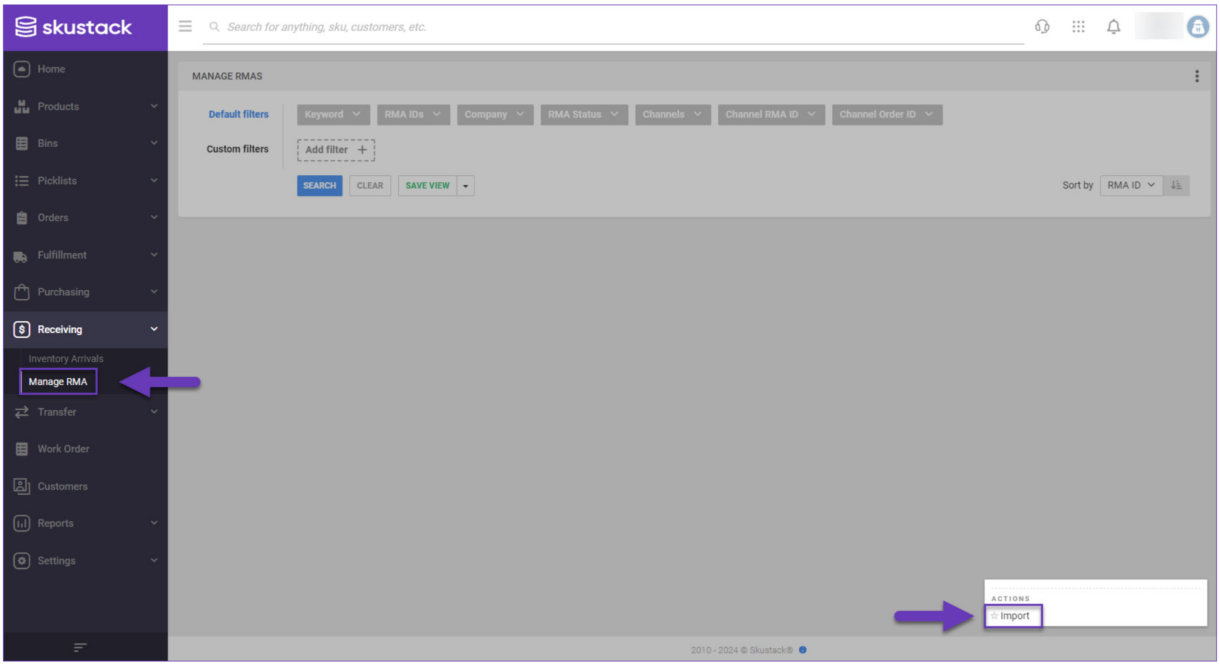
To create multiple RMAs at once:

1. Navigate to the Skustack Admin portal at **https://xx.skustack.com** (replace "**xx**" with your **server ID** or **team name**).

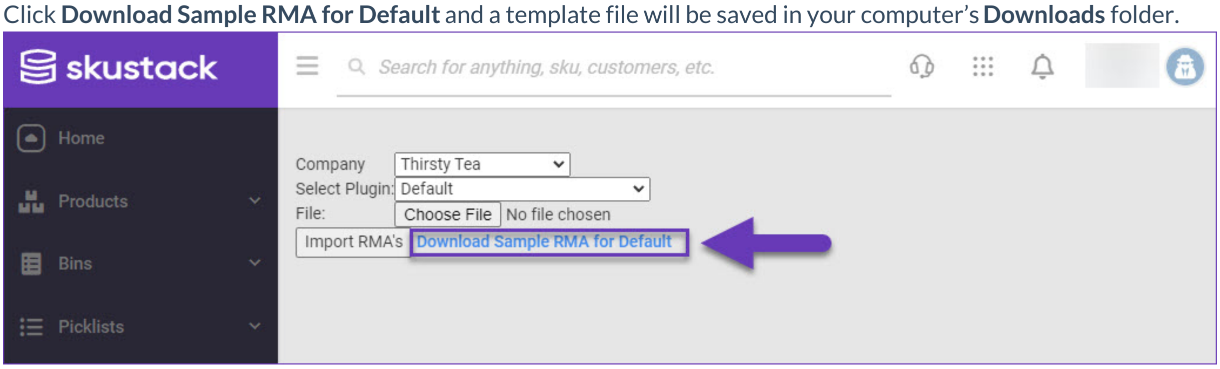
2. Enter your login credentials.

3. Select **Receiving** > **Manage RMA**.

4. Click the **Actions** icon at the bottom-right corner of the page and select **Import**.



5. Click **Download Sample RMA for Default** and a template file will be saved in your computer's **Downloads** folder.



6. Enter the required details in the downloaded spreadsheet:

   a. **OrderID**

   b. **SKU**

c. **QtyToReturn**

d. **ReturnReason**

e. **Description**

f. **ChannelRMANumber**

g. **Channel**

h. **ChannelOrderNumber**

i. **CompanyID**

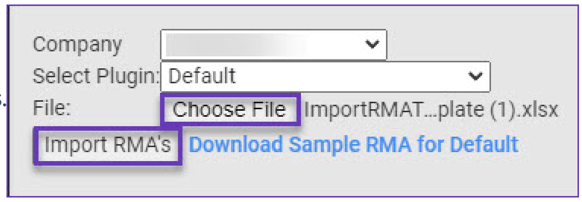
j. **TrackingNumber**

A	B	C	D	E	F	G	H	I	J
OrderID	SKU	QtyToReturn	ReturnReason	Description	ChannelRMANumbe	Channel	ChannelOrderNumber	CompanyID	TrackingNumber

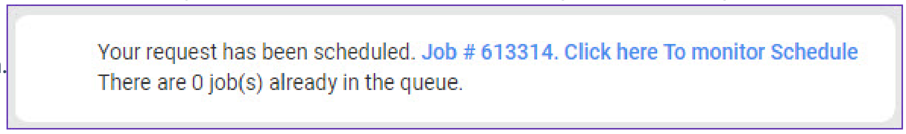
7. Once done, save the file and return to the import prompt.

8. Click **Choose File** and select the populated spreadsheet.

9. Click **Import RMAs**.



10. A Queued job will be created, from which you can monitor the status of the import. Once completed the RMAs will be created in the system.



Search RMAs

To search for existing RMAs:

1. Navigate to the Skustack Admin portal at **https://xx.skustack.com** (replace "**xx**" with your **server ID** or **team name**).

2. Enter your login credentials.

3. Select **Receiving** > **Manage RMA**.

4. Configure your **Default filters** to make sure that the results display exactly what you need.

5. Click **Search**. Each filter you apply gets highlighted. If a filter is gray or not displayed at all, it's not active.

6. To manage the columns in the grid, click the three dots icon on the top right and select **Customize Columns**. You can:

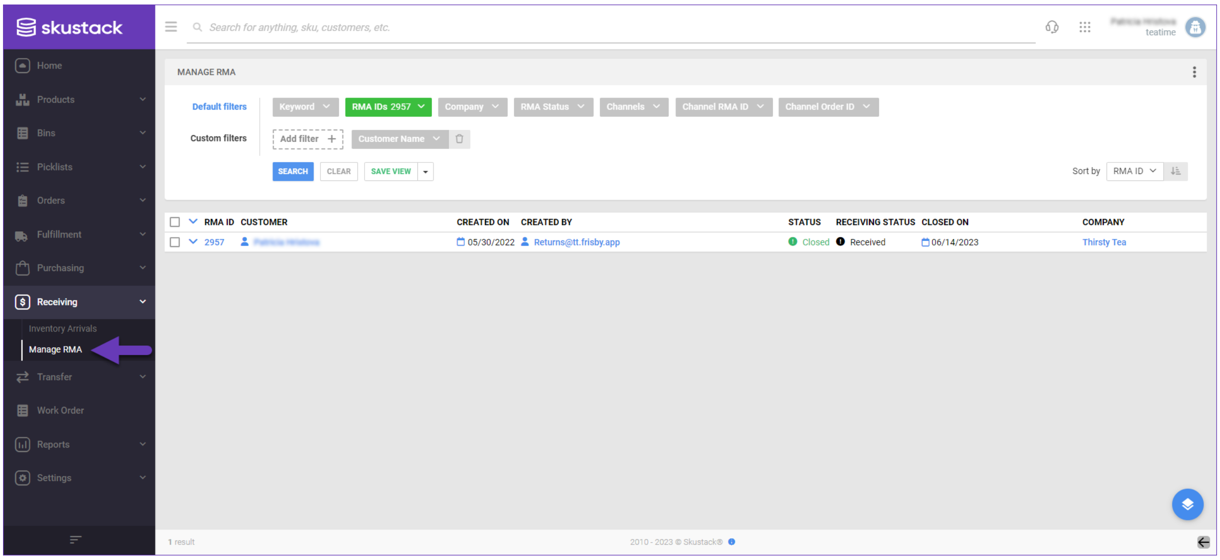
   - Reorder columns by dragging them up or down in the list;
   - Hide columns by clicking the **Trash** icons;
   - Add columns by clicking **Add column**.

7. To arrange the data in a different order, use the **Sort by** menu.

8. To save your filtering and sorting options, click **Save view**, enter a **Name,** and click **Save**.

9. Access the **Actions** menu to either import a new RMA, or export existing RMA information.

10. Click on an RMA ID to be directed to the RMA details page.

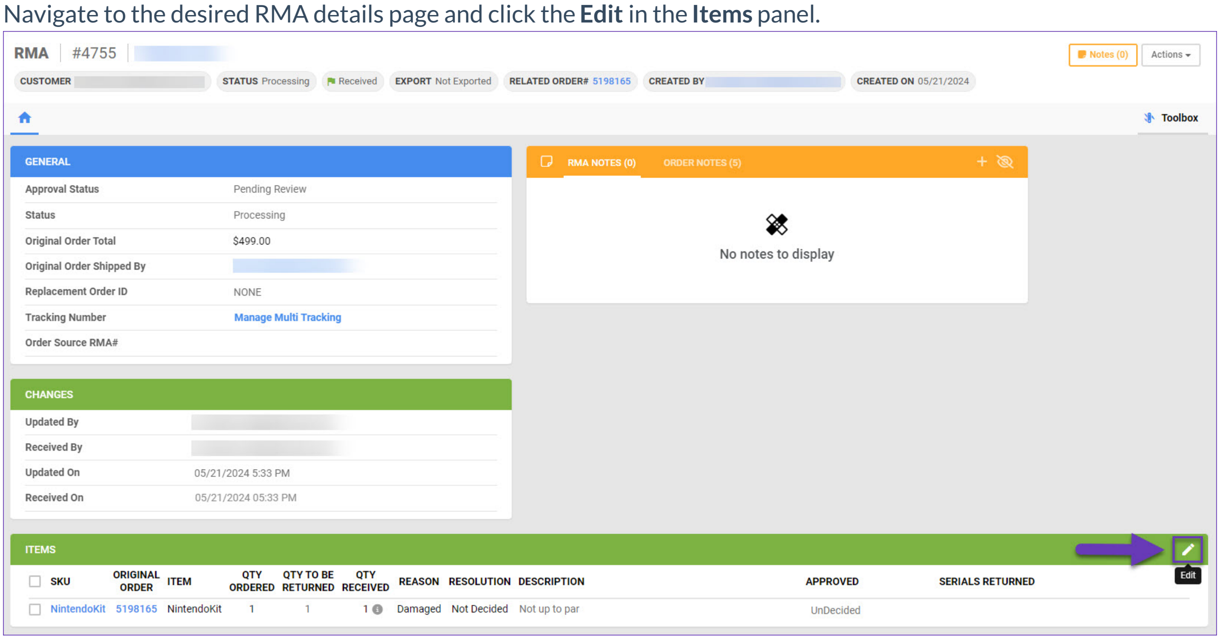


Approve RMAs

To ensure control over which RMAs are processed, you can incorporate an approval step into your workflow. By enabling the Client Setting **Enable RMA Item Approval Status**, you require that RMAs be reviewed and approved before moving forward. If you use Skustack as a standalone product, contact Sellercloud Support or your onboarding representative to enable this option.

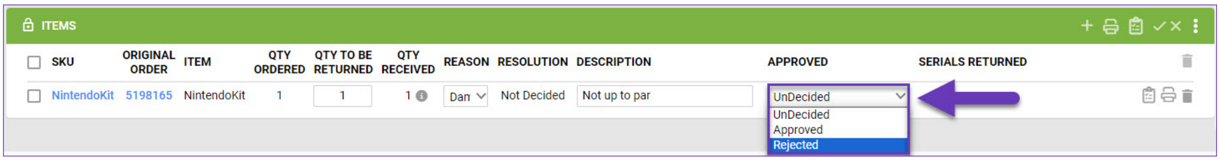
To approve RMAs:

1. Navigate to the desired RMA details page and click the **Edit** in the **Items** panel.



2. Select an approval status from the **Approved** dropdown menu:

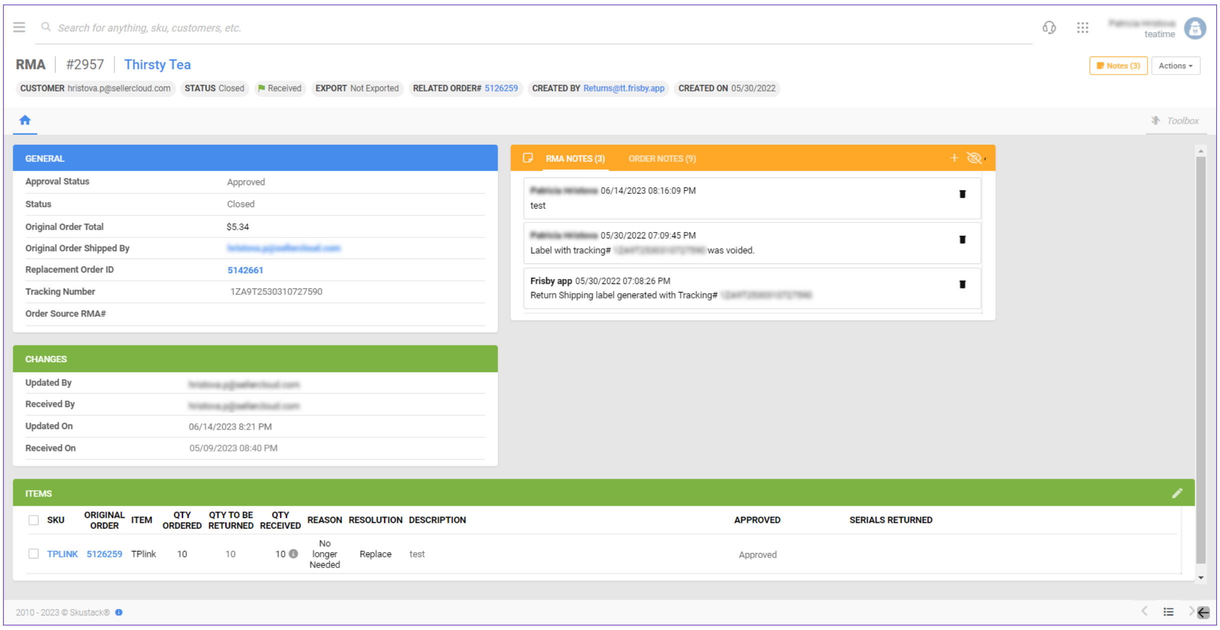
- Undecided
- Approved
- Rejected



3. Once done, click the **Save** icon.

RMA Details

On the RMA details page, you will see four panels with RMA-related information. Refer to the details below for more information about each panel.



General Panel

Field	Description
Approval Status	Internal RMA approval status. Available statuses are **Pending Review**, **Approved**, **Denied**, and **Awaiting more info**.
Status	The status of the RMA. Available statuses are **Open**, **Processing**, **On Hold**, and **Closed**.
Original Order Total	The total amount paid for the order.
Original Order Shipped By	The email address of the user who shipped the order.
Replacement Order ID	The internal replacement order number.
Tracking Number	The RMA tracking number.

Order Source RMA#	The channel RMA number.

Changes Panel

Field	**Description**
Updated By	The email address of the user who last updated the RMA.
Received By	The email address of the user who received the RMA.
Updated On	The date when the RMA was last modified.
Received On	The date when the RMA was received.

Items Panel

Field	**Description**
SKU	The product SKU.
Original Order	The internal order number.
Item	The product name.
Qty Ordered	The quantity ordered.
Qty To Be Returned	The quantity expected to be returned.
Qty Received	The quantity received back in your warehouse.
Reason	The reason for the return.
Resolution	The resolution for the return.
Description	The RMA description.
Approved	Approval status on an item level. Client setting **Enable RMA Item Approval Status** must be enabled for this workflow. If you use Skustack as a standalone product, contact Sellercloud Support or your onboarding representative to enable this option.
Serials Returned	The serial numbers of the items being returned, if applicable.

Notes Panel

Field	**Description**
RMA Notes	Notes that were added to the RMA during the receiving session. When creating a new note, you can tag one or several employees, who will receive it as a notification when they log into the Skustack Admin Portal.
Order Notes	System notes.

Toolbox

The **Toolbox** on the RMA Details page provides additional functionalities.

Tool	**Description**
Change Log	The records of all changes made to the RMA.
Documents	RMA documents or attachments, such as camera images. Typically added during the receiving session.
Serials	The serial numbers of the items being returned, if applicable.

Actions

Some of the available **Actions** on the RMA details page are:

- **Export to Excel** – Downloads an Excel spreadsheet with the RMA's details.
- **Manage Documents** – RMAs can store documents. You can Upload, View, Edit, Download, and Delete them from the corresponding RMA Documents page.
- **Manage Serials** – Here you can view and import item's Serials.
- **Print to PDF** – Use this action, to issue a PDF document with information about returned and received quantities, as well as related order's payment and refund details.
- **Receive Return** – This action allows you to receive all RMA items simultaneously.
- **Un-receive Return** – Allows you to unreceive returned RMAs.

Related Settings

Setting	Description
Validate serial globally	Client setting. Enables serial number validation in Skustack. Learn more about serial number validation and relevant client settings here.
Require serial scan if necessary	Skustack's Warehouse Management setting. When enabled, will force the user to scan serials for products that are set to require serial scan when receiving.
Use Receiving Bin	Skustack's Warehouse Management setting. When enabled, only allows receiving into the Receiving bin.