RMA Workflow

04/30/2025 3:19 pm CDT

Overview

Return Merchandise Authorization (RMA) is the recommended workflow for managing order item returns from customers in Sellercloud. RMAs let you track and process returns from the first contact with the customer up until they are received back into your warehouse.

You cannot delete items from an RMA if they have any received quantity. To remove or replace such items within the RMA, you must first unreceive the return.

To learn how to restrict returns, see Final Sale Orders.

Prerequisites

To start using the RMA workflow, it's crucial to fulfill certain prerequisites beforehand. You must configure:

- A returns warehouse.
- A returns address.
- Carrier credentials.

For step-by-step instructions on completing the prerequisites for the RMA workflow, see Returns Warehouse Configuration.

Create an RMA

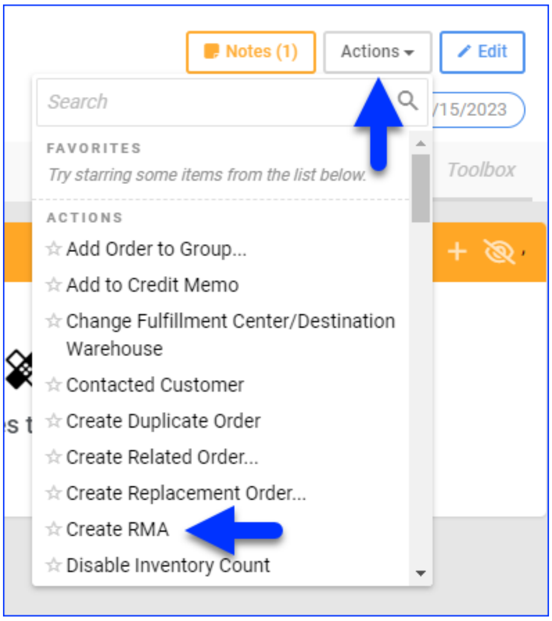
After configuring the return address as described above, you can create RMAs individually or in bulk.

Individually

To create an RMA manually:

1. Go to an Order Details Page.

2. Click **Actions** and select **Create RMA**.

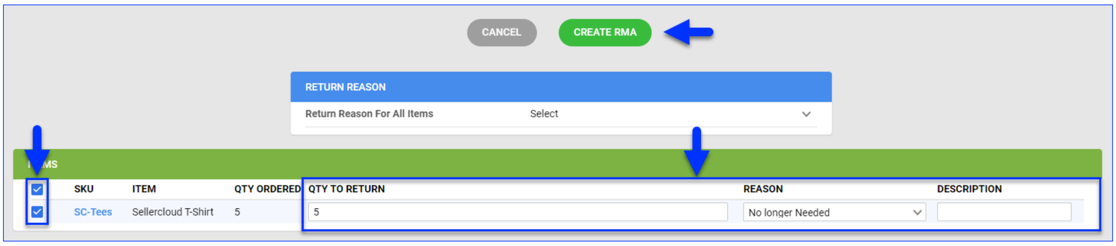


3. Check the boxes on the left to select items for return.

4. Enter a **Qty to Return**.

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

6. Optionally, enter a **Description**.



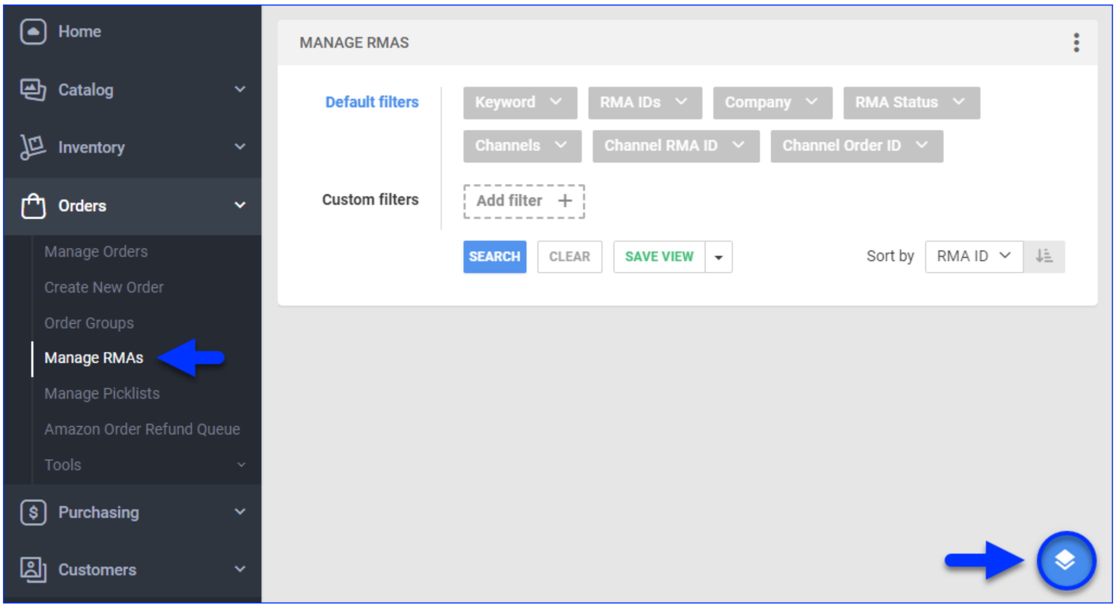
7. Click **Create RMA**.

In Bulk

To create multiple RMAs at once:

1. Go to **Orders > Manage RMAs**.

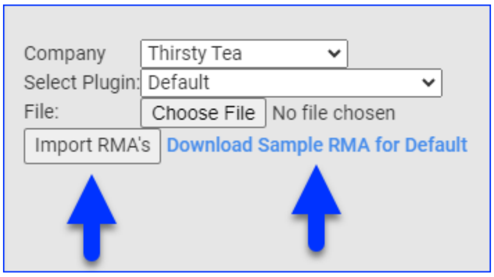
2. Click the **Actions** icon at the bottom-right corner of the page and select **Import**.



3. Click **Download Sample RMA for Default** to download the template file.

4. Update the downloaded template file.

5. Click **Import RMAs** and select the updated file.



Manage RMAs

Sellercloud offers many options when it comes to processing and managing your RMAs. In this section, we'll review some of the most essential parts of the workflow.

Search RMAs

To search for RMAs:

1. Go to **Orders > Manage RMAs**.

2. Optionally, set up the **Default filters** and **Custom filters**. Some of the most noteworthy filters are:
   a. **RMA IDs** – Show only one or more RMAs by their unique ID.

   b. **RMA Status** – Show only RMAs with a specific **Status**.

   c. **RMA Approval Status** – Show only RMAs with a specific **Approval Status**.

   d. **Received Status** – Show only RMAs with a specific **Receiving Status**.

   e. **Replacement Status** – Show only RMAs with or without a Replacement.

   f. **Refund Status** – Show only RMAs with or without a Refund.

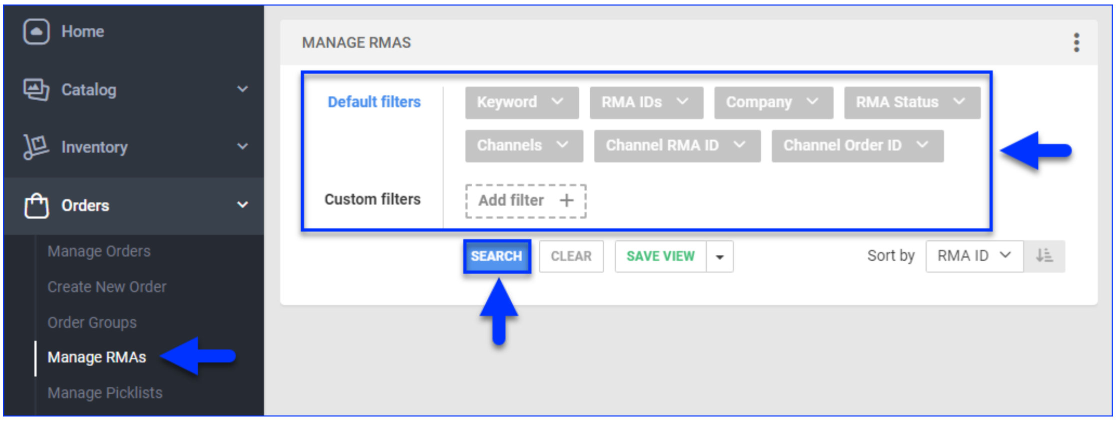
   g. **RMA Note Contains** – Show only RMAs with specific text in their **Notes**.

   h. **Created On** – Show only RMAs created within a specific time range.

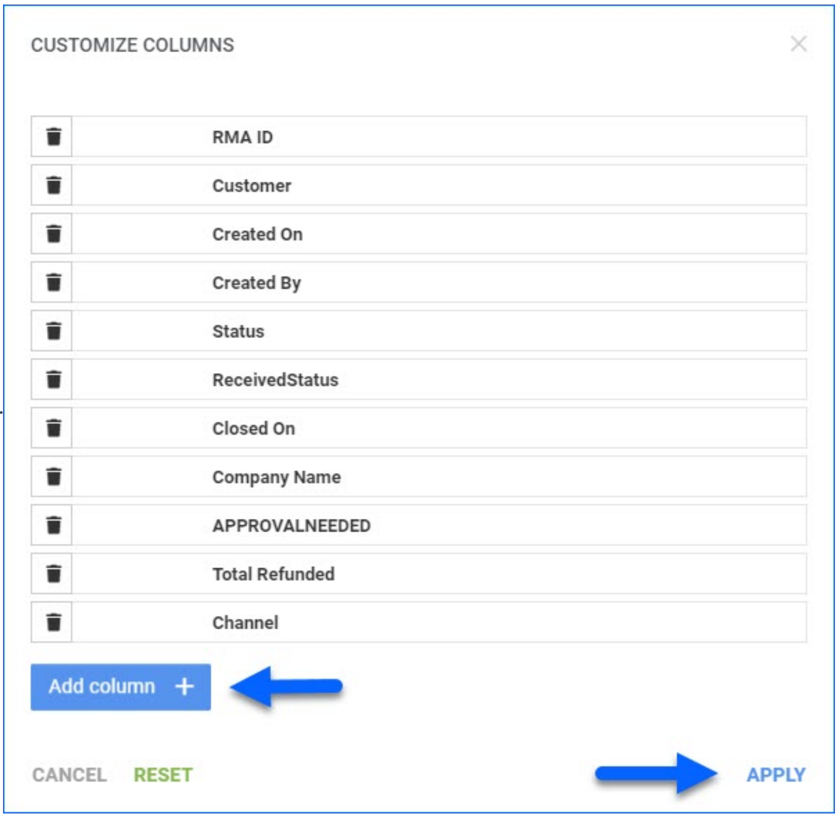
   i. **SKU** – Show only RMAs containing specific SKUs.

   j. **Tracking Number** – Show only one or more RMAs by their unique **Tracking Number**.

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



Additionally, you can customize the results grid to display different columns. Click on the three dots menu in the **Manage RMAs** panel > **Customize Columns**. There, you can pick up to 13 options such as **Status, Channel, Approval Needed,** relevant **Dates,** and more.

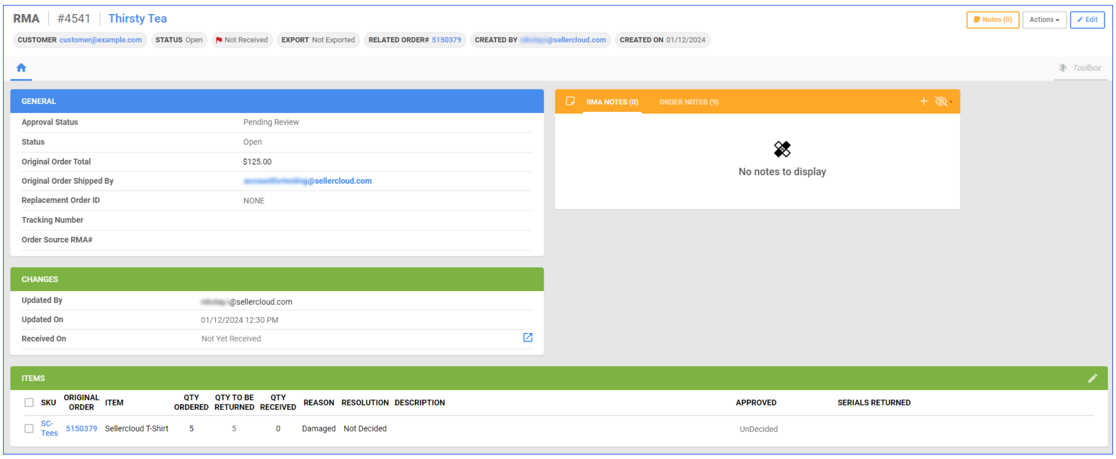


View RMAs

You can view and manage different data associated with each RMA on its RMA Details page. There are a few ways to access the RMA Details page:

1. Search for RMAs, then click the **RMA's ID**.
2. Click the RMA link on top of the associated Order Details Page.
3. Use the Global Search bar to search by **RMA ID**.
4. Click an RMA link anywhere else in the Sellercloud UI.

Regardless of which option you use, you will end up on the RMA Details page, which looks like this:



Approve RMAs

To maintain control over which RMAs should be processed, you can also add an approval step to your workflow. This will require someone to review the RMAs and approve them before proceeding.

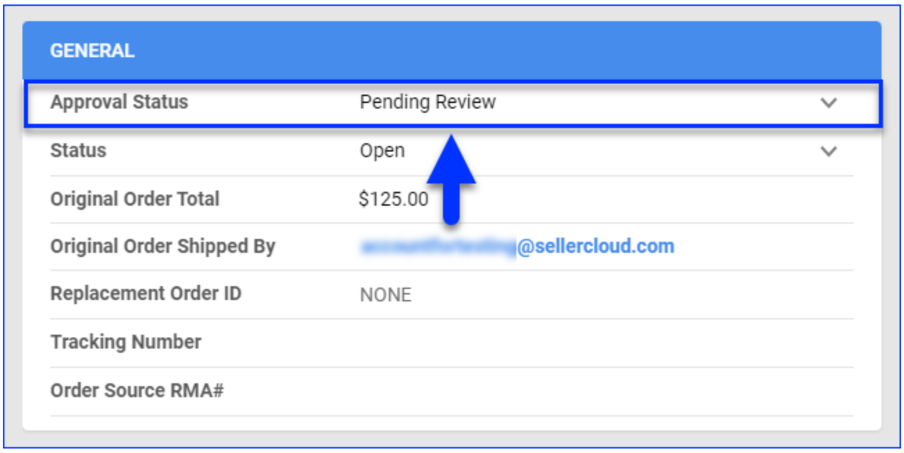
All RMAs have an approval status by default. However, you can also require approval per item by enabling **Enable RMA Item Approval Status** in the Client Settings.

To approve RMAs:

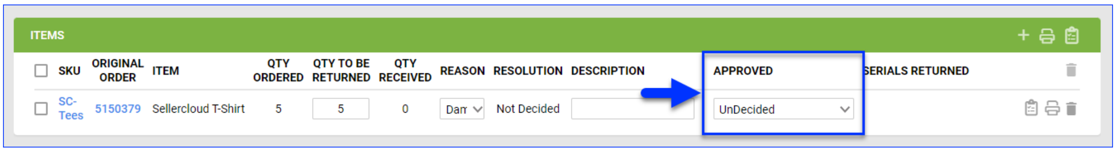
1. Go to the RMA Details page.

2. Click **Edit**.

3. To approve the entire RMA, update the **Approval Status** field in the **General** panel.



4. To approve specific items, update the **Approved** field in the Items panel.



5. Click **Save**.

To quickly find RMAs that require approval, you can Search for RMAs by **Approval Status**.

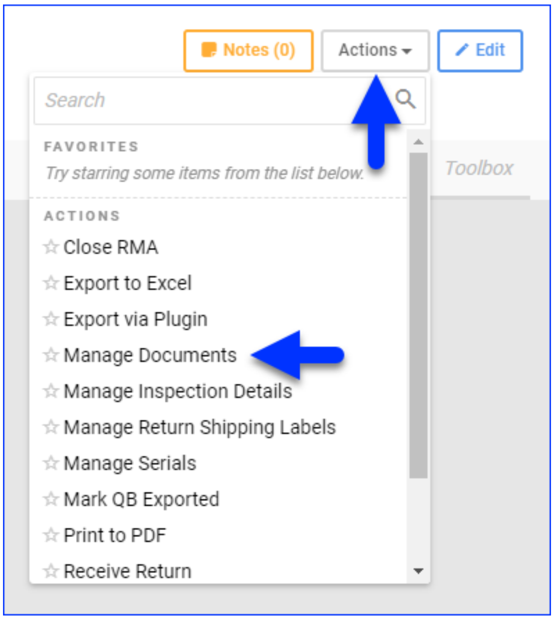
Manage Documents

RMAs in Sellercloud can store documents. You can **Upload, View**, **Edit**, **Download**, and **Delete** them from the corresponding Toolbox tab.

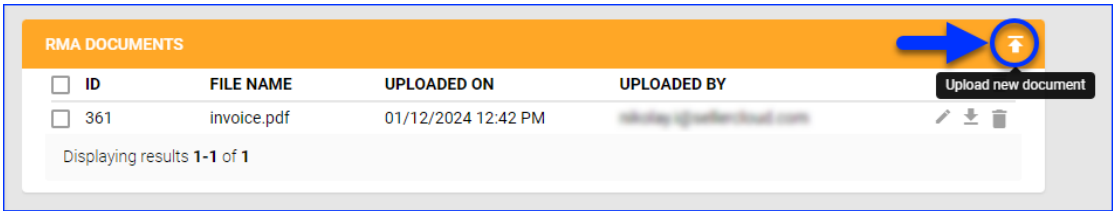
To upload a document to an RMA:

1. Go to the RMA Details page.

2. Click **Actions** and select **Manage Documents** or click **Documents** from the **Toolbox.**

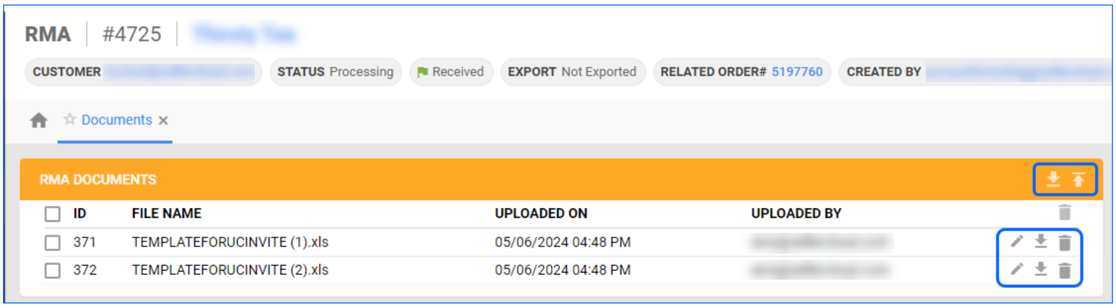


3. Click the **Upload New Document** icon on the top right of the **RMA Documents** panel.



4. Select the **File** and click **Upload**.

Once you have uploaded your documents, they will show up in the grid where you can perform additional actions such as Edit, Delete, Download, and Download All.



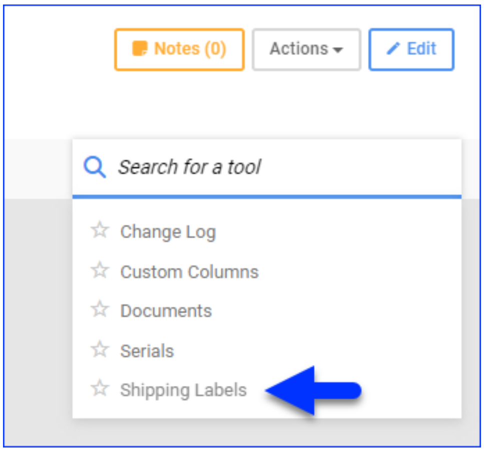
Manage Return Labels

You can generate a return label from Sellercloud and email it to the customer.
To generate labels in Sellerlcoud, you must set up carrier credentials in your Shipping API Settings.

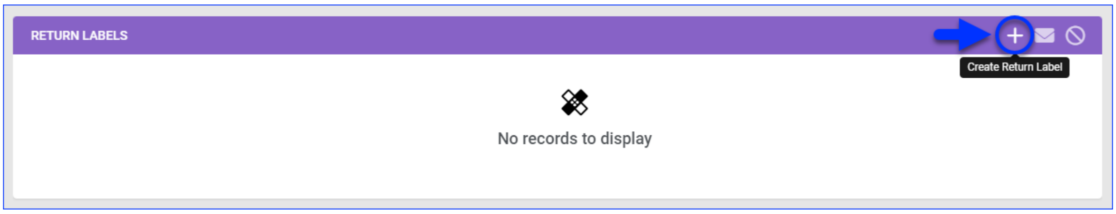
To generate and send labels:

1. Go to the RMA Details page.

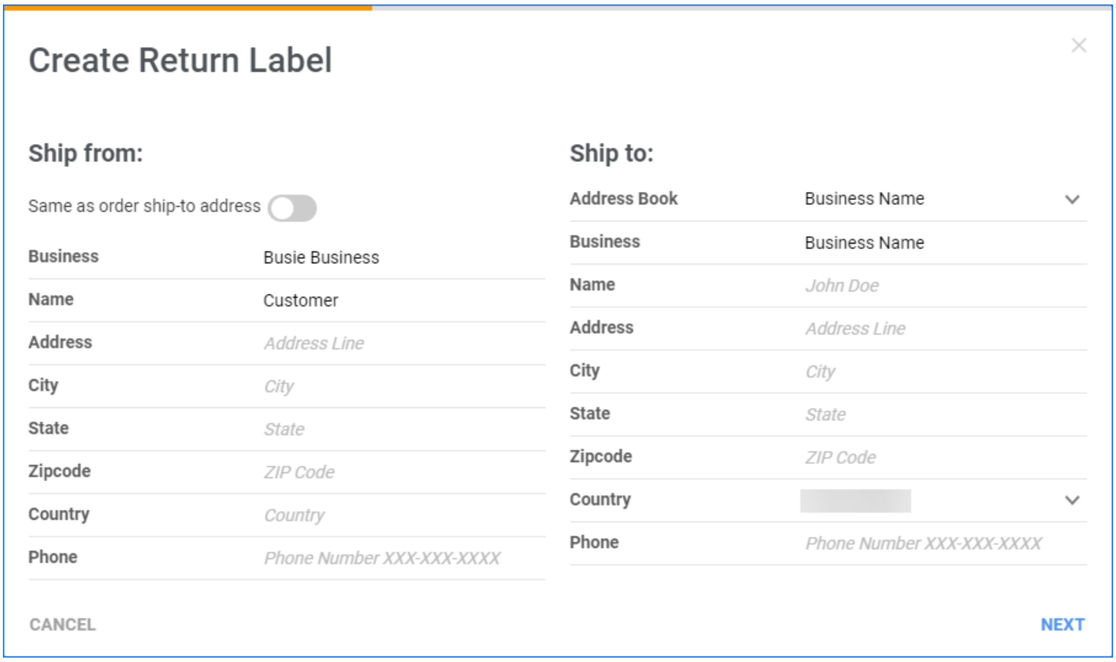
2. Click **Toolbox** and select **Shipping Labels.**



3. Click the **Create Return Label** icon.



4. In the first step of the **Create Return Label** modal you can populate the **Ship from** and **Ship to** addresses, name and business.



5. In the second step of the **Create Return Label** you can manage packages, dimensions, carriers and insurance.

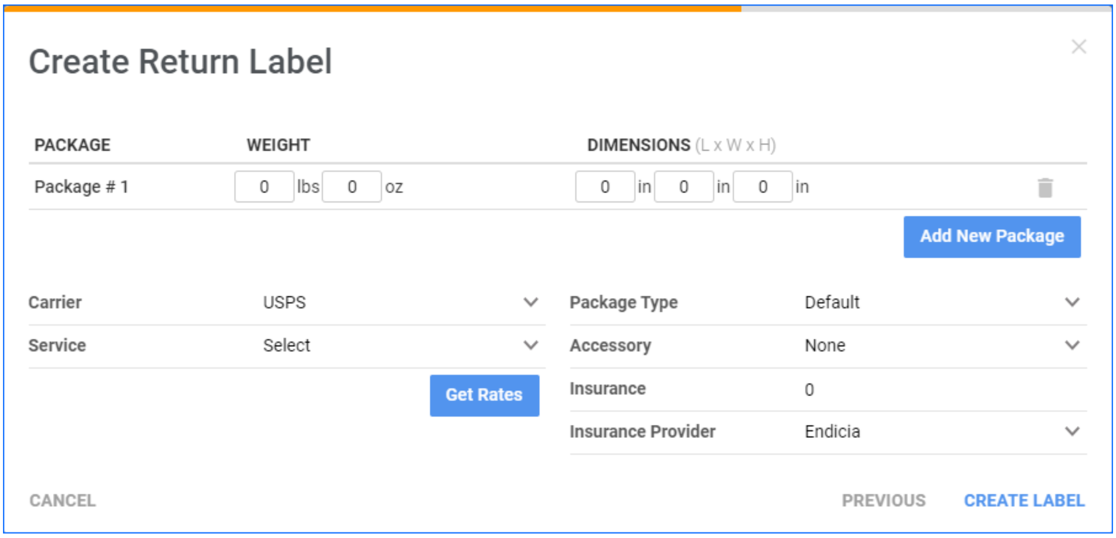
   a. **Package** – Ensure the weigh and dimensions of the package are correct. You can create additional packages from the Add New Package button.
   A separate Shipping Label will be generated for each package.

   b. **Carrier** and **Service** – Select the shipping carrier and service. You can view and compare shipping rates by clicking on the **Get Rates** button.

   c. **Package Type** – Select the packaging for the return.

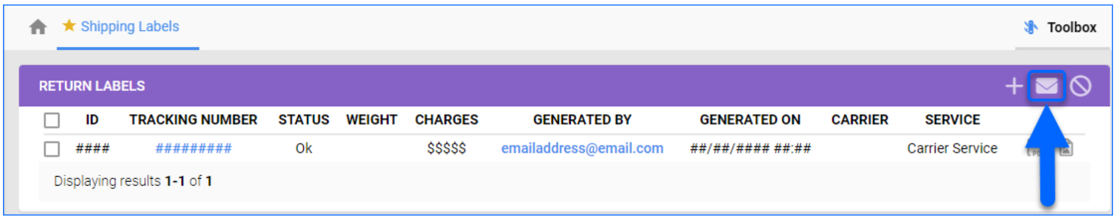
   d. **Accessory** – Select from **None**, **AdultSignature Required,** or **Signature Required**.

   e. **Insurance** – Select the amount that will be insured.
   When using USPS as a carrier, you can choose the Insurance Provider between**Endicia** and **UspsOnline**.



6. Click **Create Label**.

7. To email a label, select it and click **Send Selected Via Email**. You can also click the **Send All Via Email** icon to send all labels.



See RMA Labels Configuration for more information and step-by-step instructions on generating, emailing, and voiding return labels.

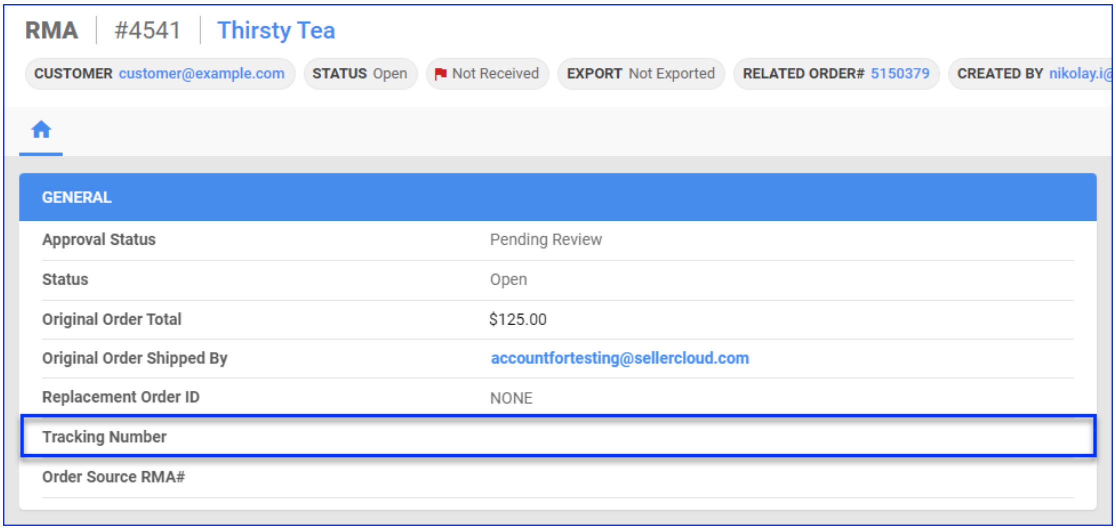
Add Tracking

By default, an RMA can only have one tracking number. To add a tracking number manually:

1. Go to the RMA Details page.

2. Click **Edit**.

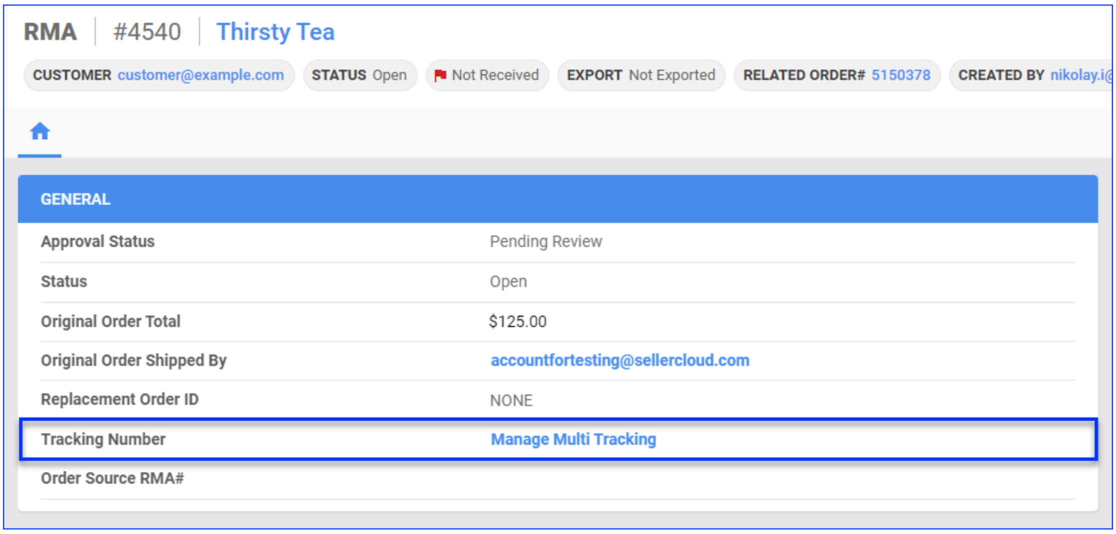
3. Enter the **Tracking Number** in the **General** tab.



4. Click **Save**.

You can also add multiple tracking numbers to RMAs by enabling the Client Setting **Enable Multiple Tracking Numbers For RMA**.

Then, the **Tracking Number** field on the RMA Details page will show a link to **Manage Multi Tracking**.



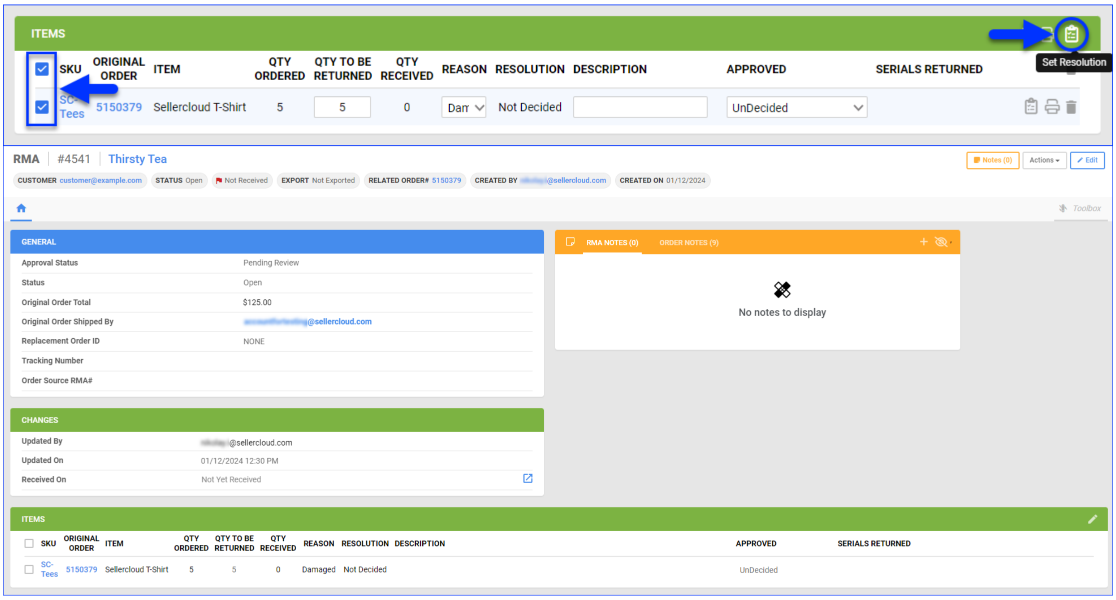
Depending on whether the setting **Enable Multiple Tracking Numbers For RMA** is enabled or disabled at the time when an RMA is created, you'll be able to add only one tracking number or use multi-tracking. Once an RMA is created, you can't switch its tracking option from single to multi-tracking or vice-versa.

Resolve RMAs

You can select a reason and resolution for your RMA even if it's not received yet.
For more information, see RMA Reasons and Resolutions Overview.

To resolve an RMA:

1. Open the RMA Details page.
2. Click **Edit**.
3. In the **Items** panel, check the boxes on the left to select items.
4. Select a **Reason**.
5. Click **Set Resolution**.



6. Select a **Resolution** and type a **Comment**.
7. Click **Set Resolution**.

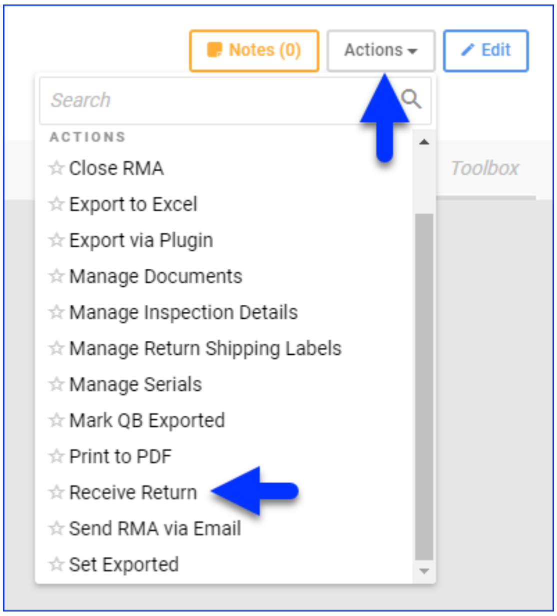
Sometimes, you may have to resolve an RMA by replacing the items. To be able to create Replacement Orders in Sellercloud, go to Client Settings and enable **Enable RMA Replacement Order Workflow.**

You can process replacement requests faster by automatically creating a replacement order when you set an RMA's **Resolution** to **Replace**. To use this feature, go to Client Settings and enable **Auto Create Replacement Order When Setting Resolution To Replace.** To automate this process further, you can also enable **Put Replacement Order OnHold Until RMA Is Received**, which will set the replacement order's status to **On Hold** until you Receive the Items.

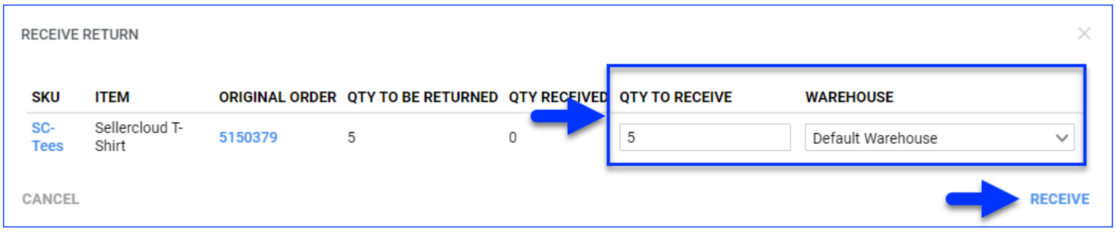
Receive Items

To receive an RMA:

1. Go to the RMA Details page.
2. Click **Actions** and select **Receive Return**.



3. Enter the **Qty to Receive** and select a **Warehouse**.



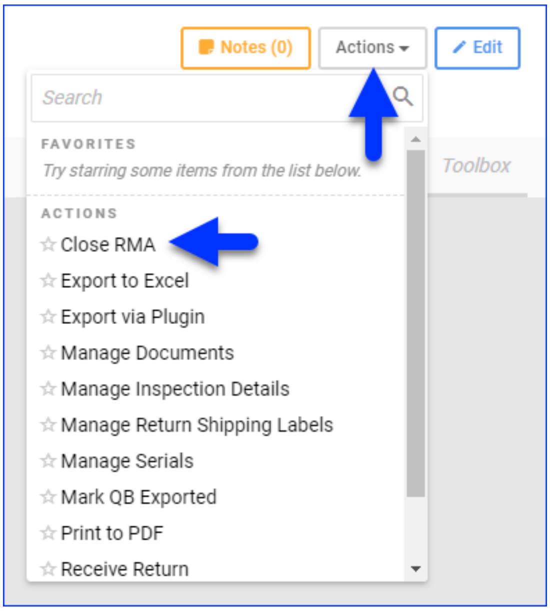
4. Click **Receive**. The inventory movement will be noted as an **OrderReturn** on the Inventory Movement History. The item cost on the order will automatically update to 0.

   You can not delete received items from the RMA.

Close RMAs

There are two ways to close an RMA after resolving it:

- Go to the RMA Details page, click **Actions**, and select **Close RMA**.



- Enable **Auto Close RMA When Resolution Updated** in your Client Settings and then Set a Resolution.

Learn how you can enhance your RMA workflow with Orderback.

Overview

Return Merchandise Authorization (RMA) is the recommended workflow for managing order item returns from customers in Sellercloud. RMAs let you track and process returns from the first contact with the customer up until they are received back into your warehouse.
You cannot delete items from an RMA if they have any received quantity. To remove or replace such items within the RMA, you must first unreceive the return.
To learn how to restrict returns, see Final Sale Orders.

Update to the Video: Inventory will now be *updated automatically* in Sellercloud whenever you *receive* an RMA in ReceiveBridge.

Configure Return Address Settings

To create an RMA label in Sellercloud, you must first configure your return address settings as described below. You can either configure them for each company or per channel by creating a channel company profile. Note that the channel company profile will take priority over the company return address.

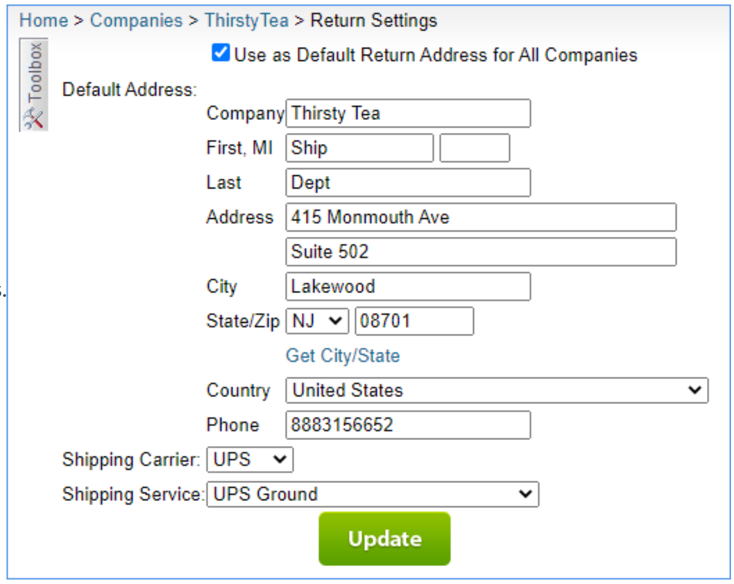
Company Return Address

To configure a company return address, follow the steps below:

1. Go to **Settings** > **Company** > **Toolbox** > **Return Settings.**

2. Enter the **Address** for the return label and select the default **Shipping Carrier** and **Shipping Service**. The carrier set here

becomes the default for all new RMA return labels.



Do not put spaces, parentheses, or dashes into the Phone field as this may cause errors.

3. Go to **Toolbox** > **Shipping API**.
   Enter the API credentials for your RMA labels.

Channel Company Profile

To configure a channel company profile, follow the steps below:

1. Navigate to **Settings** > **Companies** > Select a **Company** > **Toolbox** > **Channel Company Profile**.
2. Choose the channel from the **Channel** dropdown.
3. Select **Enable below Return label address**.
4. Enter your **Return Address**.

Create an RMA

1. Open the order and click Action Menu > **Manage RMA > Go.**
2. Create a new return by completing the required fields: **Qty To Return**, Reason for return, and **Description**.
3. Click **Continue**. An RMA number will be generated for the order.
4. *Optional:* Add a note to the RMA and click **Create Note**.
5. *Optional*: Add a document to the RMA by clicking Action Menu > **Manage Documents > Go**. Upload or delete documents.
6. Click **Save**.

Email an RMA

1. To email the return instructions to the customer, click Action Menu > **Send RMA via Email > Go**. The customer's email address on the order will populate in the **E-mail Address** field. (Amazon and Buy.com will redirect the email to the buyer's real email.) The email will default to the email template assigned to RMAs on the Email Template Assignment page. Other templates will be available for selection from the **Select Email Template** dropdown. You can also write or edit instructions in the**Email Message** editor.

- To email automatically, enable the Client Setting **Auto Send email when RMA Created**.
- To create a return label and email it to the customer, go to Create a Return Label.

Receive an RMA

1. When the merchandise is actually returned, in the RMA click Action Menu > **Receive Return > Go**.
2. Enter the **Qty Received** and select the receiving **Warehouse**.
   a. It is a best practice to create an Unsellable Warehouse for returns.
   b. You can not delete received items from the RMA.
3. Click **Save**. The inventory movement will be noted as an OrderReturn on the Inventory movement history. The item cost on the order will automatically update to “0.”

Resolve an RMA

1. In the RMA, select a resolution option from the Action Menu > Go:
2. For example, to *replace* the item, choose **Set Resolution to Replace**.
   a. On the next page, enter a reason why you are replacing the item, and click **Save**. A replacement order with all the order information, including the address and item, will be created. Click the link to access and manage the replacement order. The replacement order price will default to a full discount.
3. For example, to *refund* the item, choose **Set Resolution to Refund**.
   a. On the next page, enter the refunded amount. *The reason for refunding an order is required.* Click **Save**. To process the refund, click the Refund Order link to open the refund order page. If you created a replacement order and then changed your mind and decide to refund, an option allows you to void the replacement order from the Refund Resolution page.
4. On the Exchange resolution page, you can enter an exchange SKU with which to exchange the returned item. A replacement order with the new item will be created. The replacement order will assume the sale price of the original order and be fully discounted.

Optional: For greater oversight of RMA management, the RMA details page can also offer an **Approved** dropdown column with 3 options:

1. Select **Enable RMA Item Approval Status** in the Client Settings.
2. On the RMA detail page, see the **Approved** column next to the Resolution column with a default status of Undecided.
3. Choose Approved or Rejected as the status for each item > Save.

Close an RMA

There are 2 options when you have finished with an RMA:

- In the RMA, click Action Menu > **Close RMA > Go**.
- Select **Auto Close RMA when Resolution updated** in the Client Settings > Save.

When needed, here’s how to *disallow* an RMA.