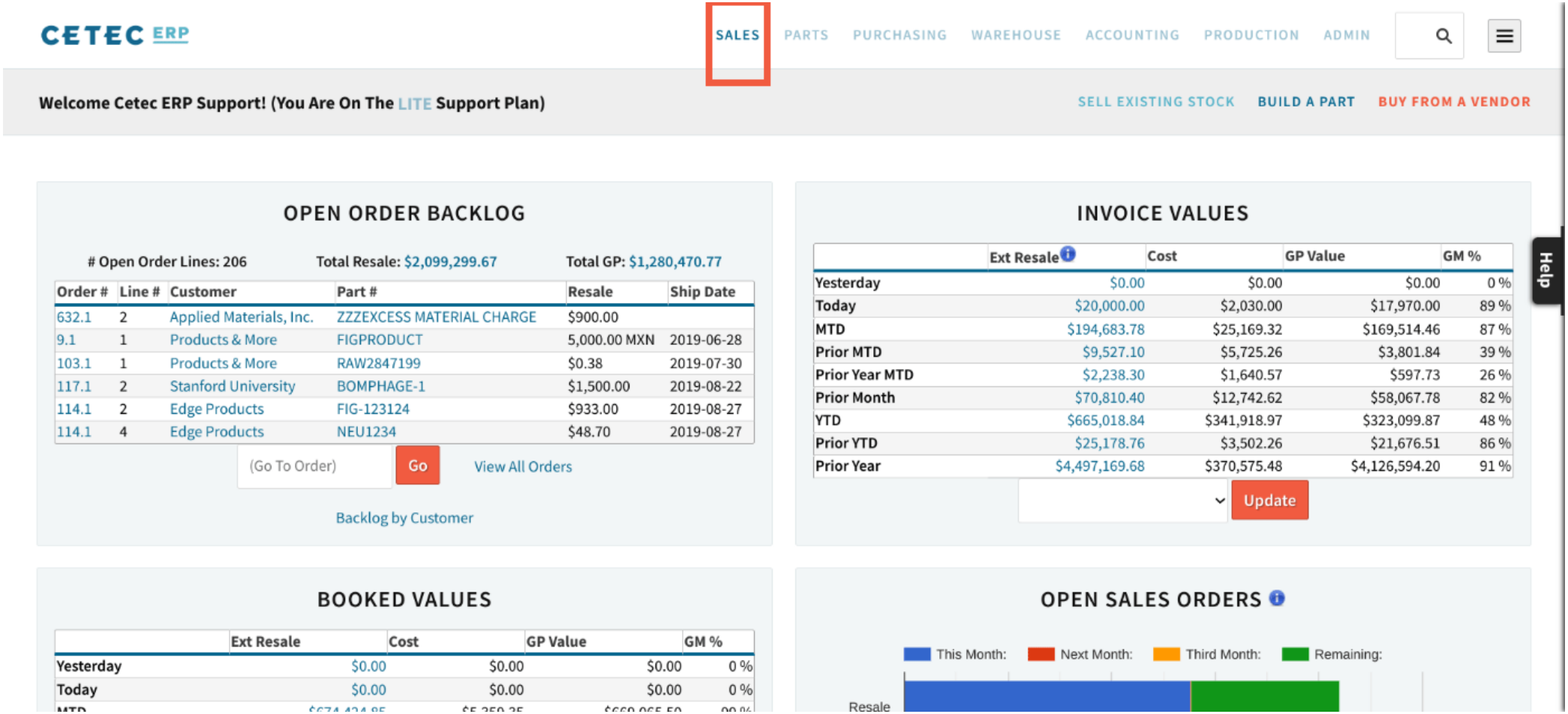
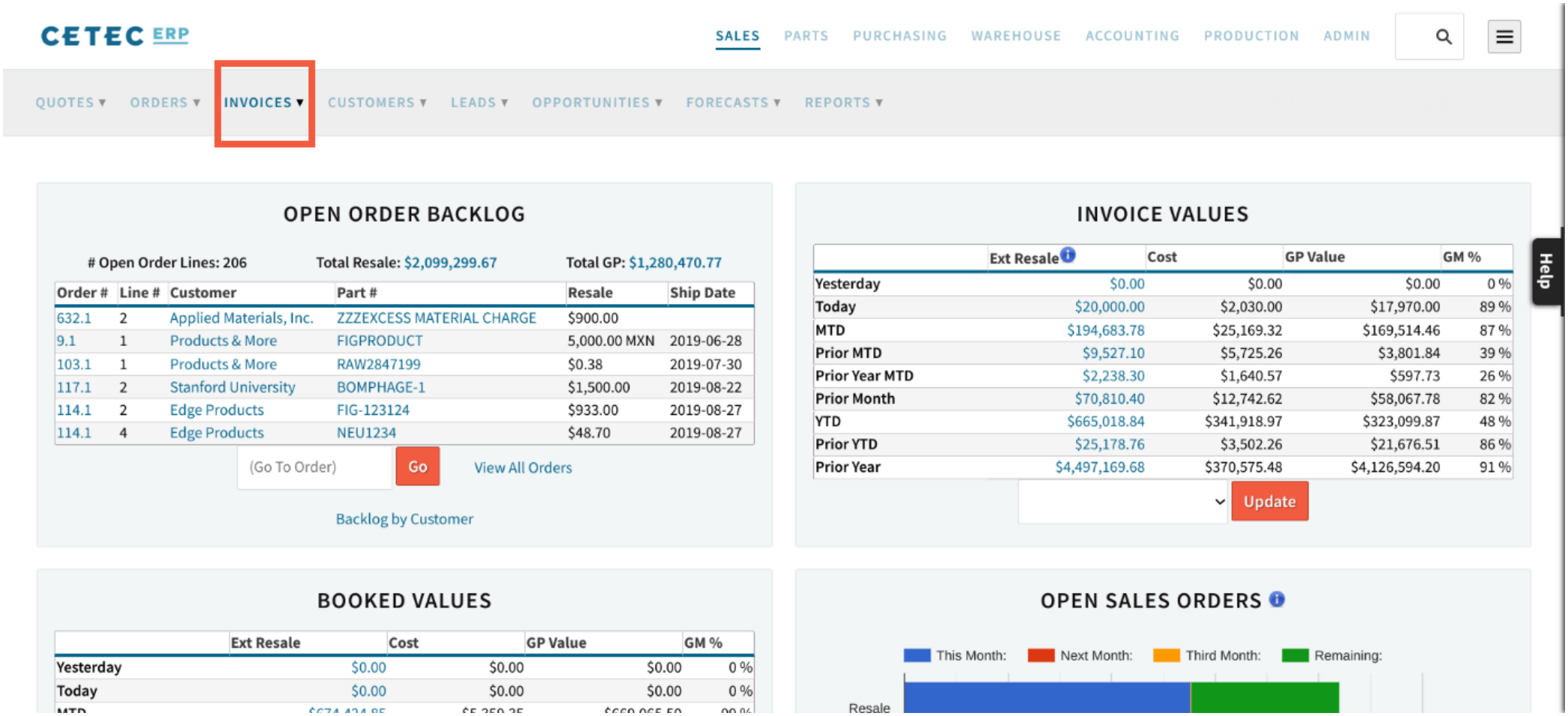
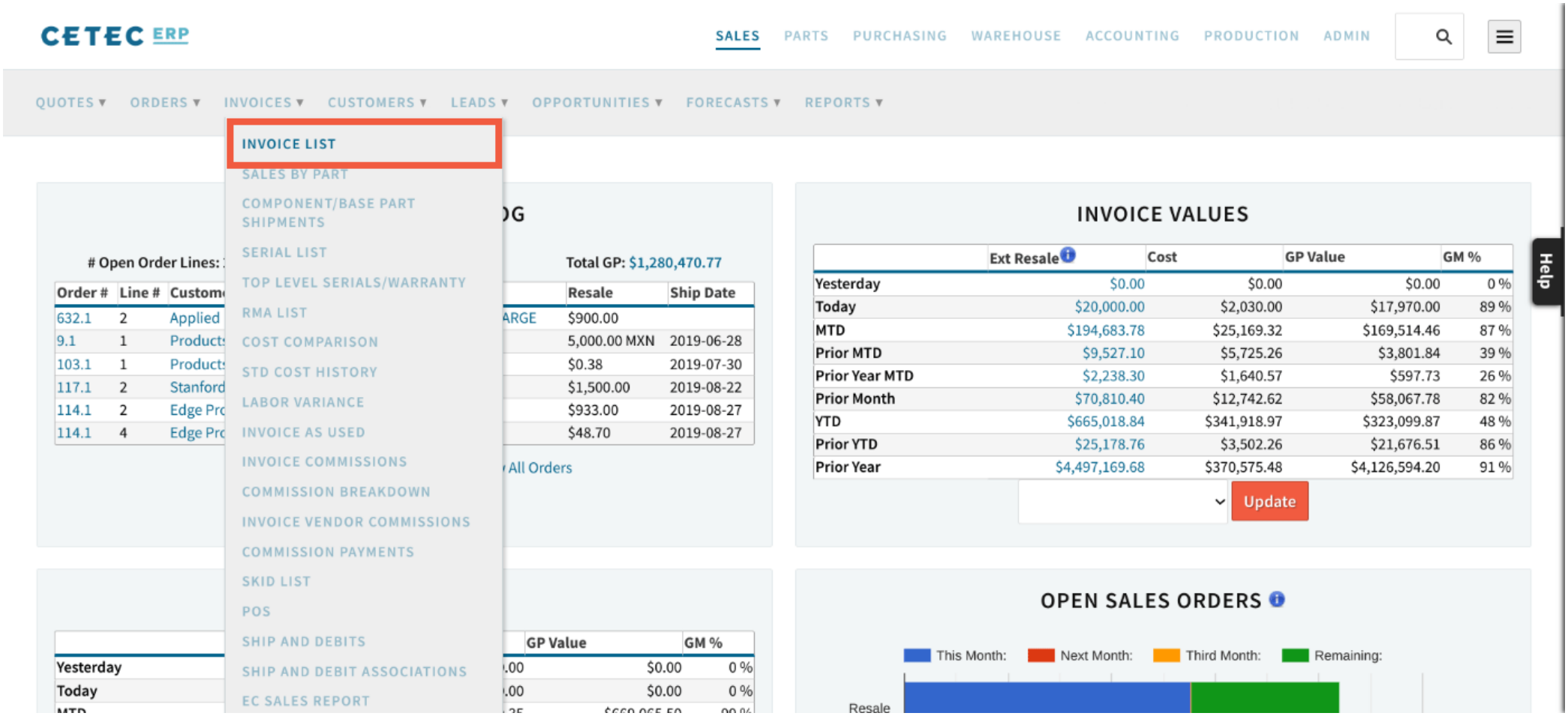
How do I create an RMA in Cetec ERP? First, I'll navigate to my invoice for the corresponding order. In this case, I'll click Sales,



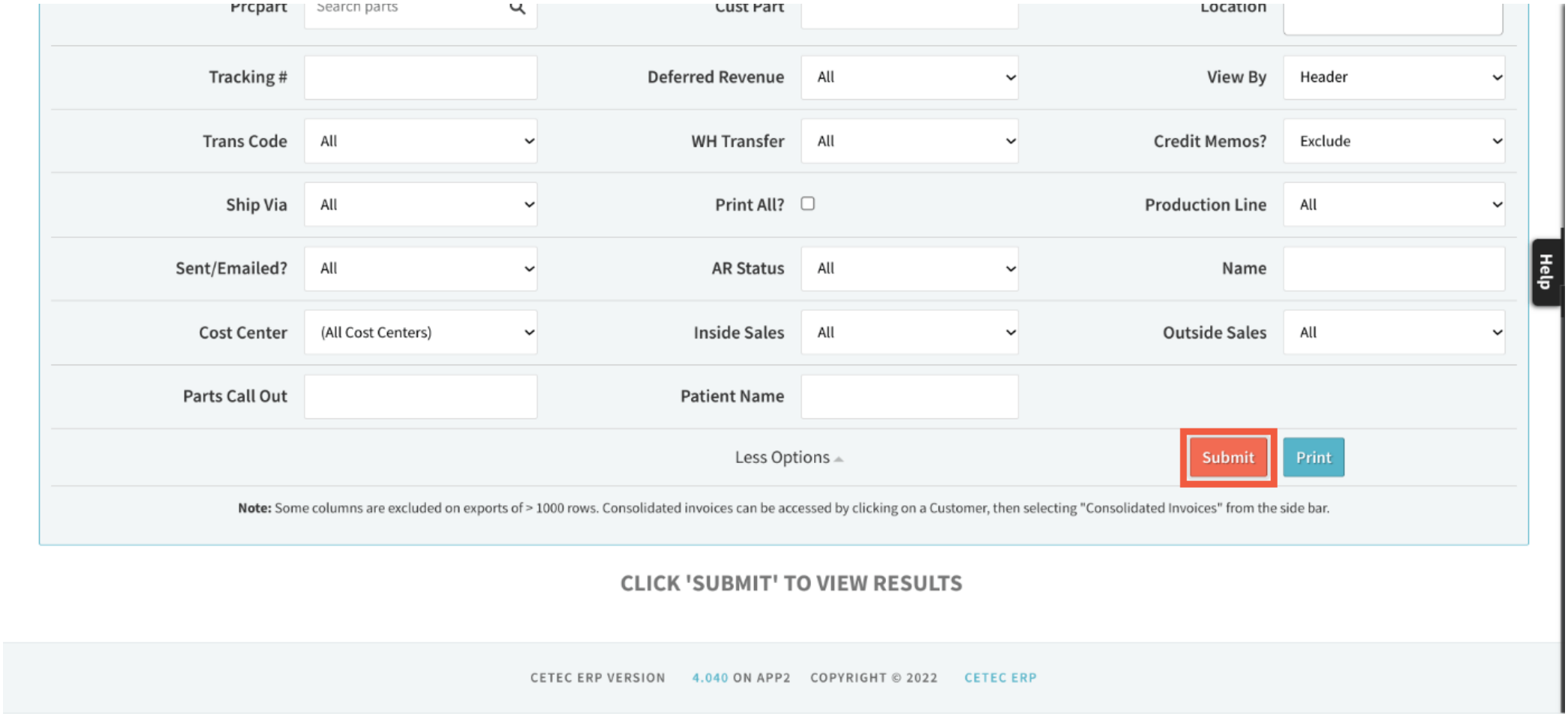
click Invoices,



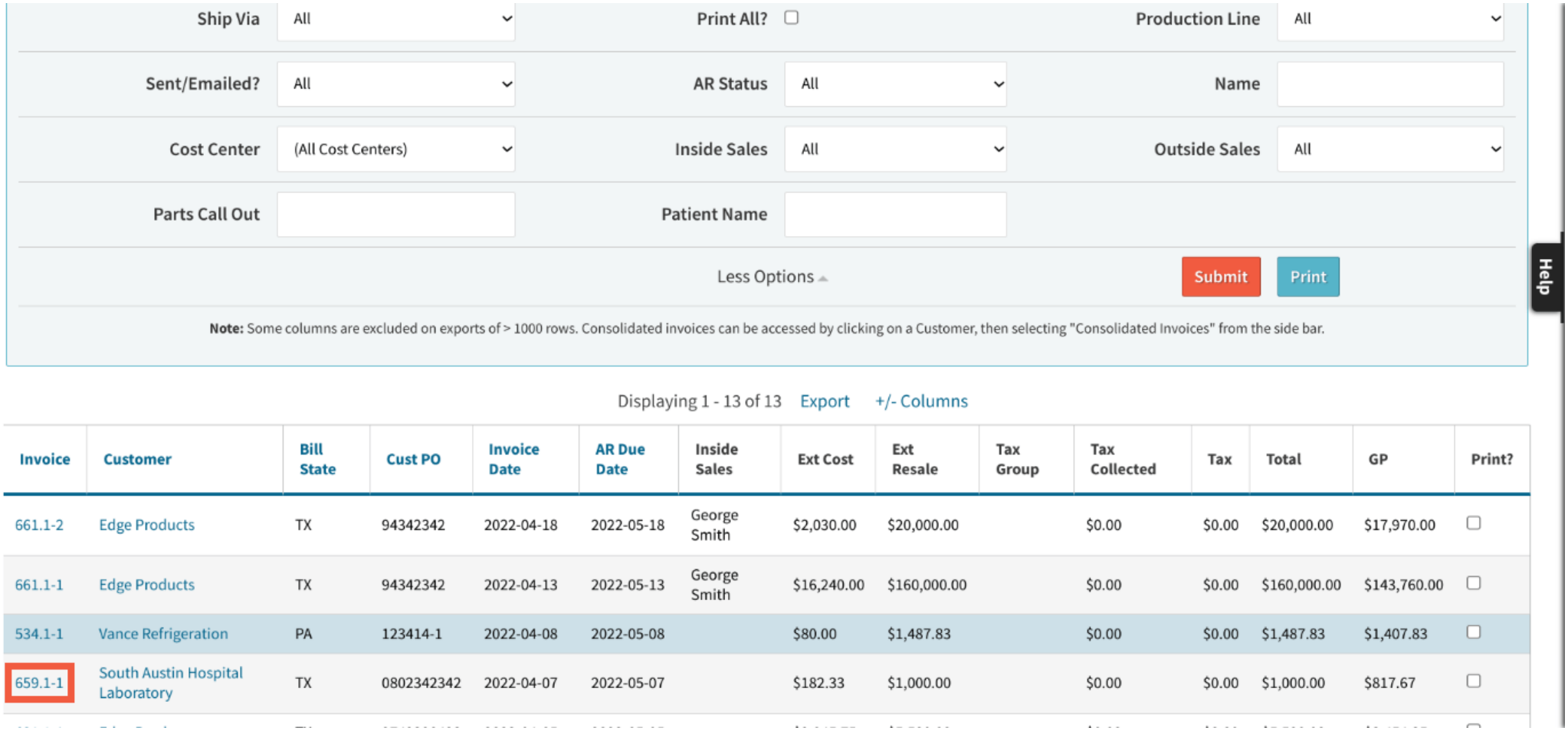
click Invoice List,



and click Submit.

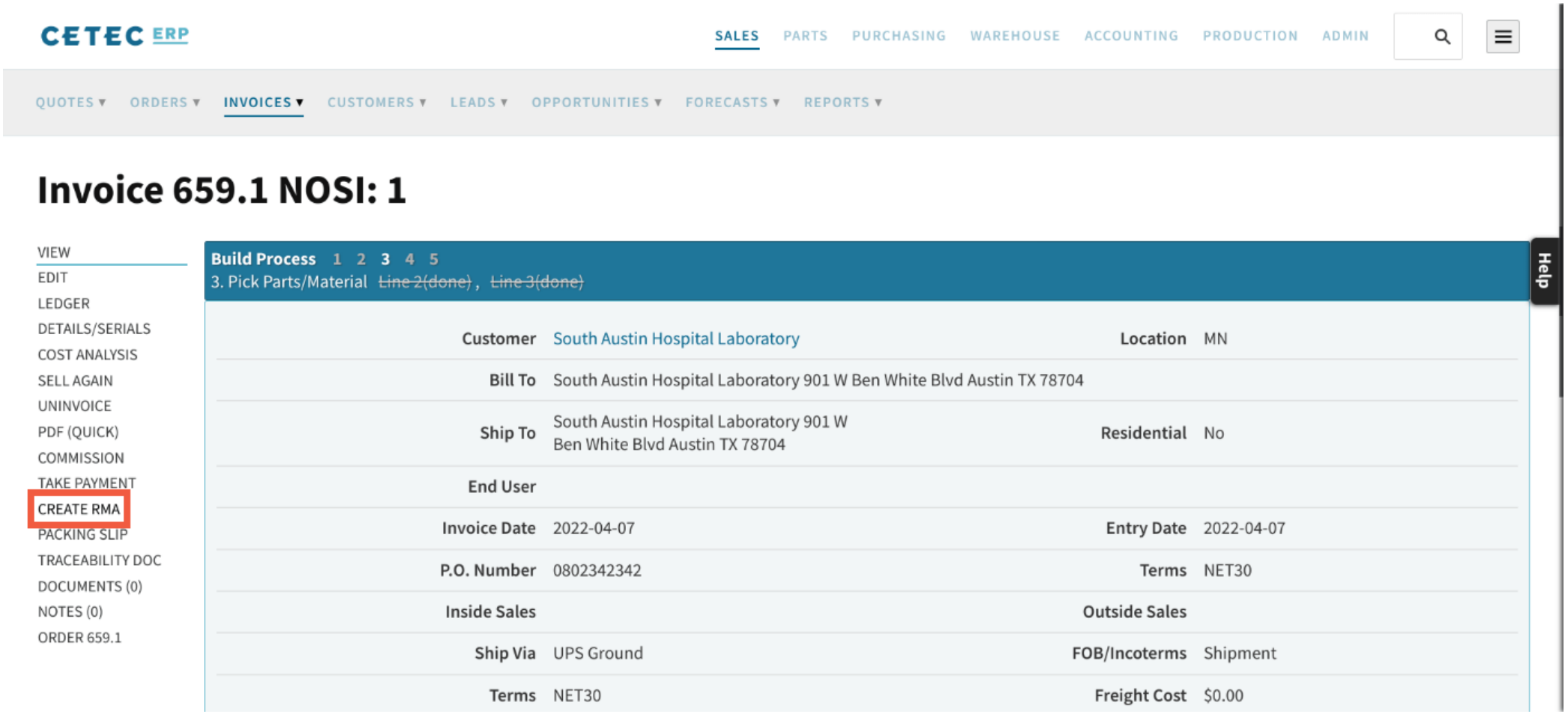


Then I click into my invoice / closed order.

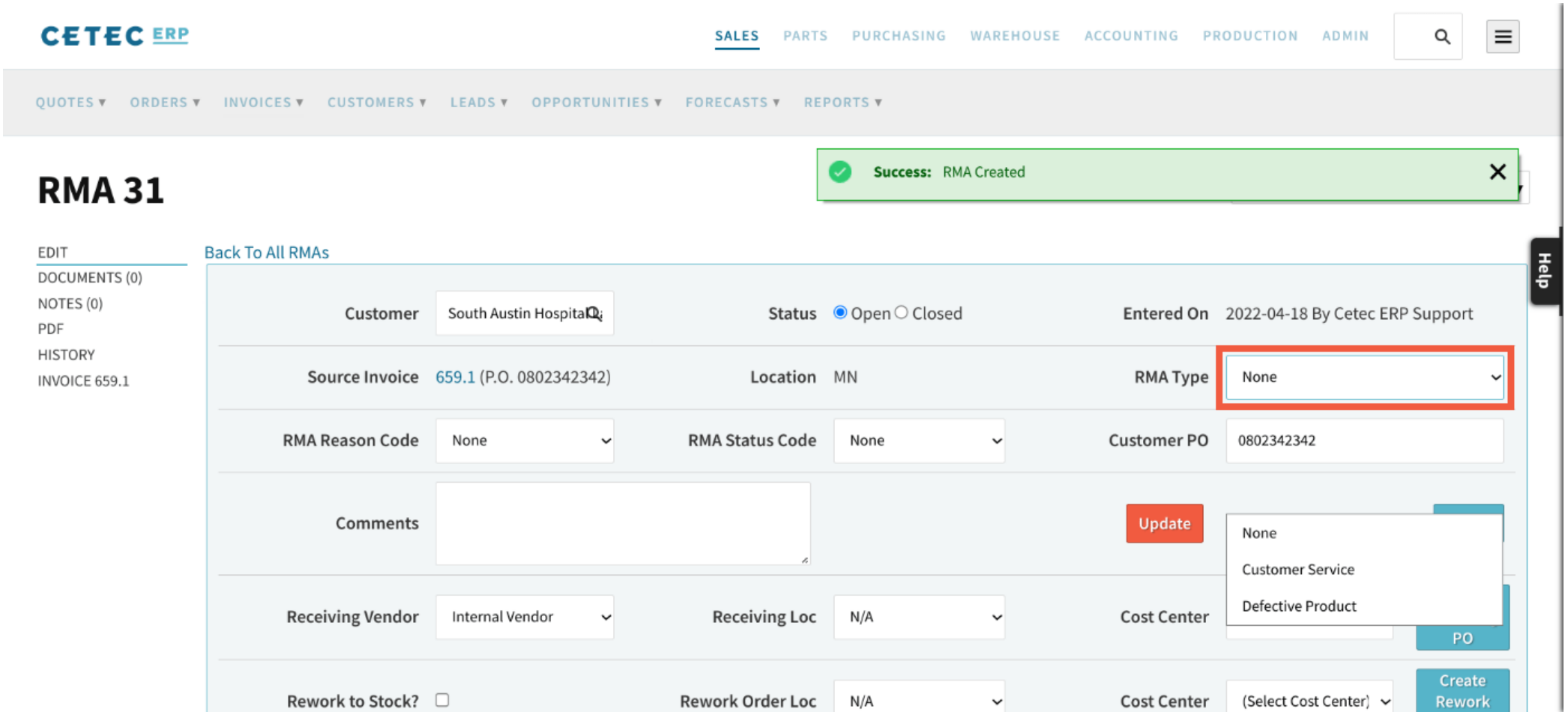


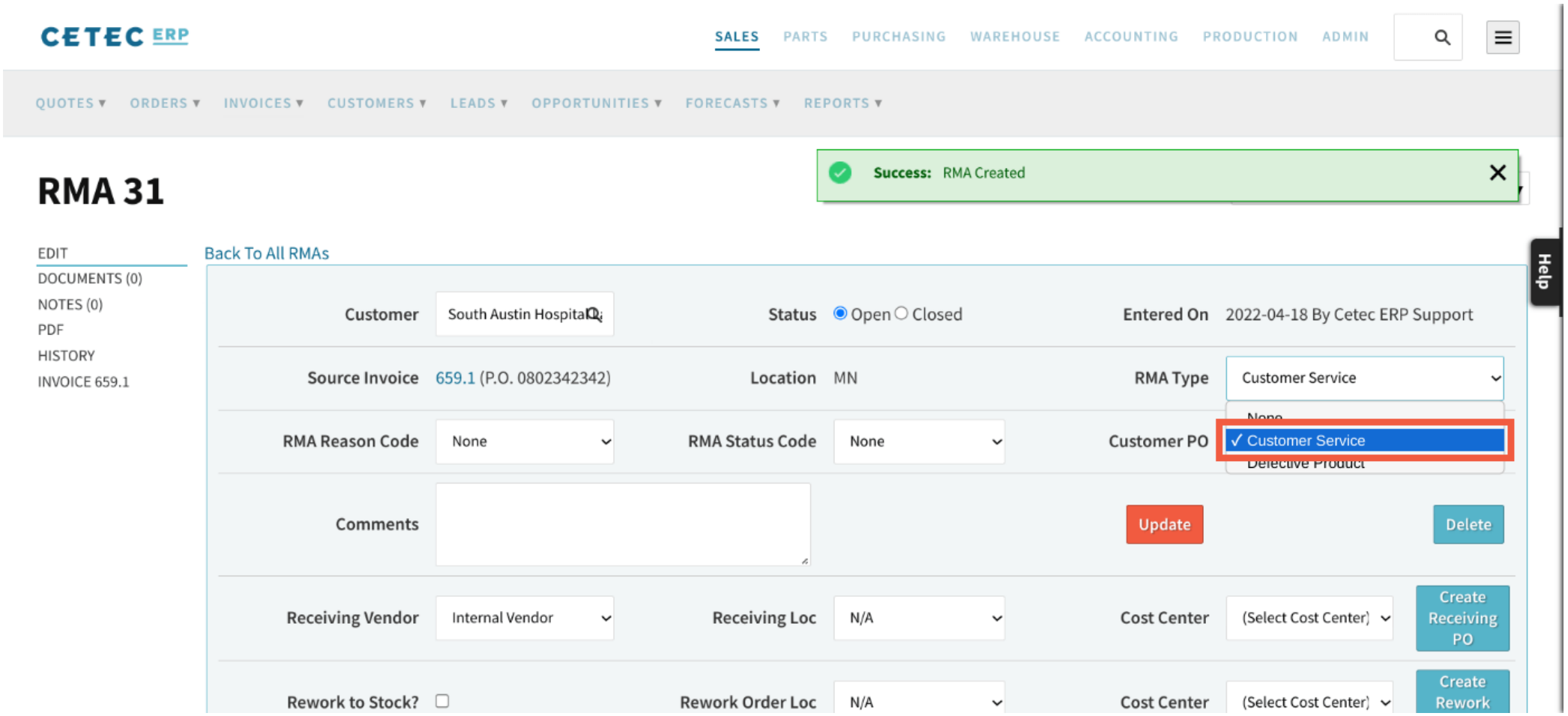
Invoice	Customer	Bill State	Cust PO	Invoice Date	AR Due Date	Inside Sales	Ext Cost	Ext Resale	Tax Group	Tax Collected	Tax	Total	GP	Print?
661.1-2	Edge Products	TX	94342342	2022-04-18	2022-05-18	George Smith	$2,030.00	$20,000.00		$0.00	$0.00	$20,000.00	$17,970.00	☐
661.1-1	Edge Products	TX	94342342	2022-04-13	2022-05-13	George Smith	$16,240.00	$160,000.00		$0.00	$0.00	$160,000.00	$143,760.00	☐
534.1-1	Vance Refrigeration	PA	123414-1	2022-04-08	2022-05-08		$80.00	$1,487.83		$0.00	$0.00	$1,487.83	$1,407.83	☐
659.1-1	South Austin Hospital Laboratory	TX	0802342342	2022-04-07	2022-05-07		$182.33	$1,000.00		$0.00	$0.00	$1,000.00	$817.67	☐

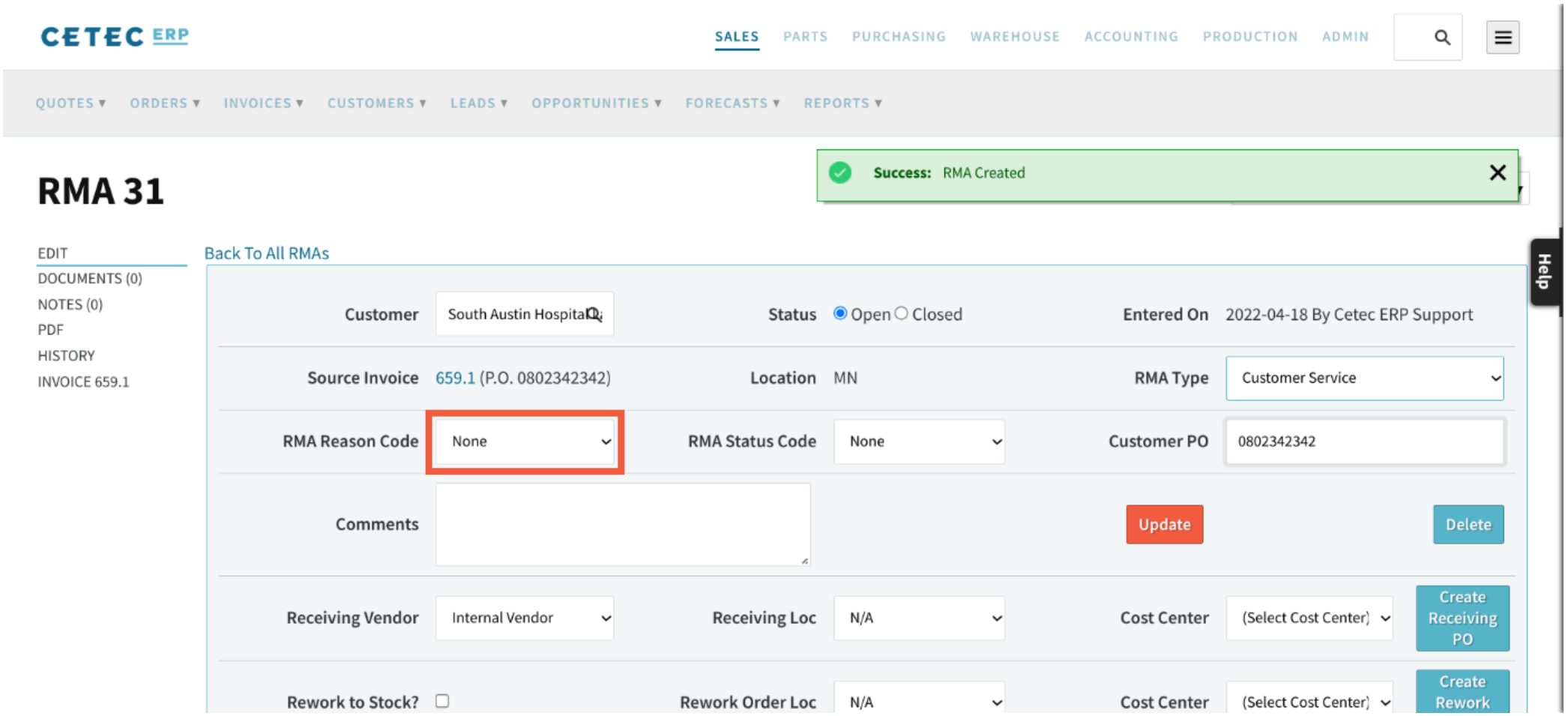
In the left side menu of the order screen, click Create RMA.



Here on the RMA screen, input any relevant information.




CETEC ERP
SALES
PARTS
PURCHASING
WAREHOUSE
ACCOUNTING
PRODUCTION
ADMIN
QUOTES
ORDERS
INVOICES
CUSTOMERS
LEADS
OPPORTUNITIES
FORECASTS
REPORTS
RMA 31
Success: RMA Created
EDIT
DOCUMENTS (0)
NOTES (0)
PDF
HISTORY
INVOICE 659.1
Back To All RMAs
Help
Customer
South Austin Hospital
Status
Open
Closed
Entered On
2022-04-18 By Cetec ERP Support
Source Invoice
659.1 (P.O. 0802342342)
Location
MN
RMA Type
Customer Service
None
Customer Service
Defective Product
RMA Reason Code
None
RMA Status Code
None
Customer PO
Comments
Update
Delete
Receiving Vendor
Internal Vendor
Receiving Loc
N/A
Cost Center
(Select Cost Center)
Create Receiving PO
Rework to Stock?
Rework Order Loc
N/A
Cost Center
(Select Cost Center)
Create Rework


CETEC ERP
SALES
PARTS
PURCHASING
WAREHOUSE
ACCOUNTING
PRODUCTION
ADMIN
QUOTES
ORDERS
INVOICES
CUSTOMERS
LEADS
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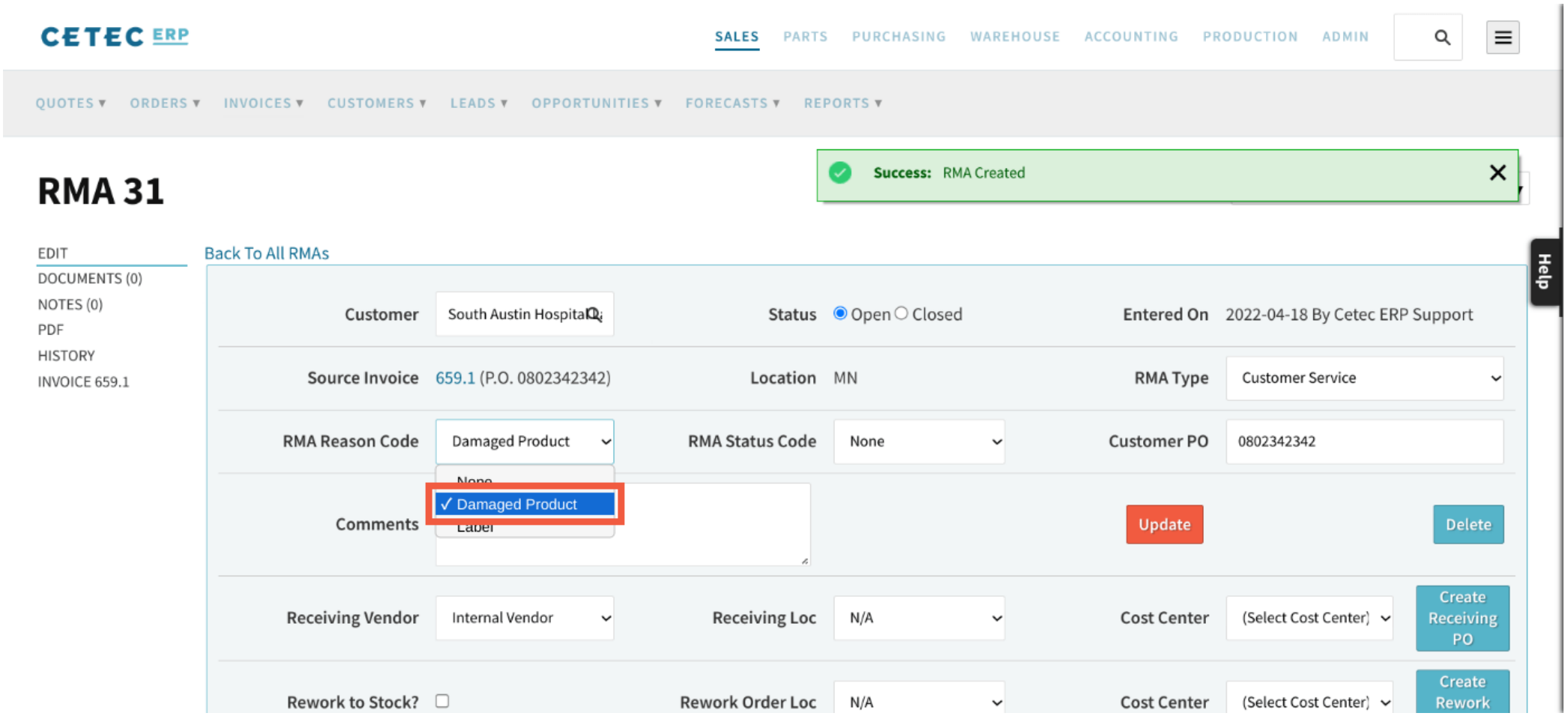
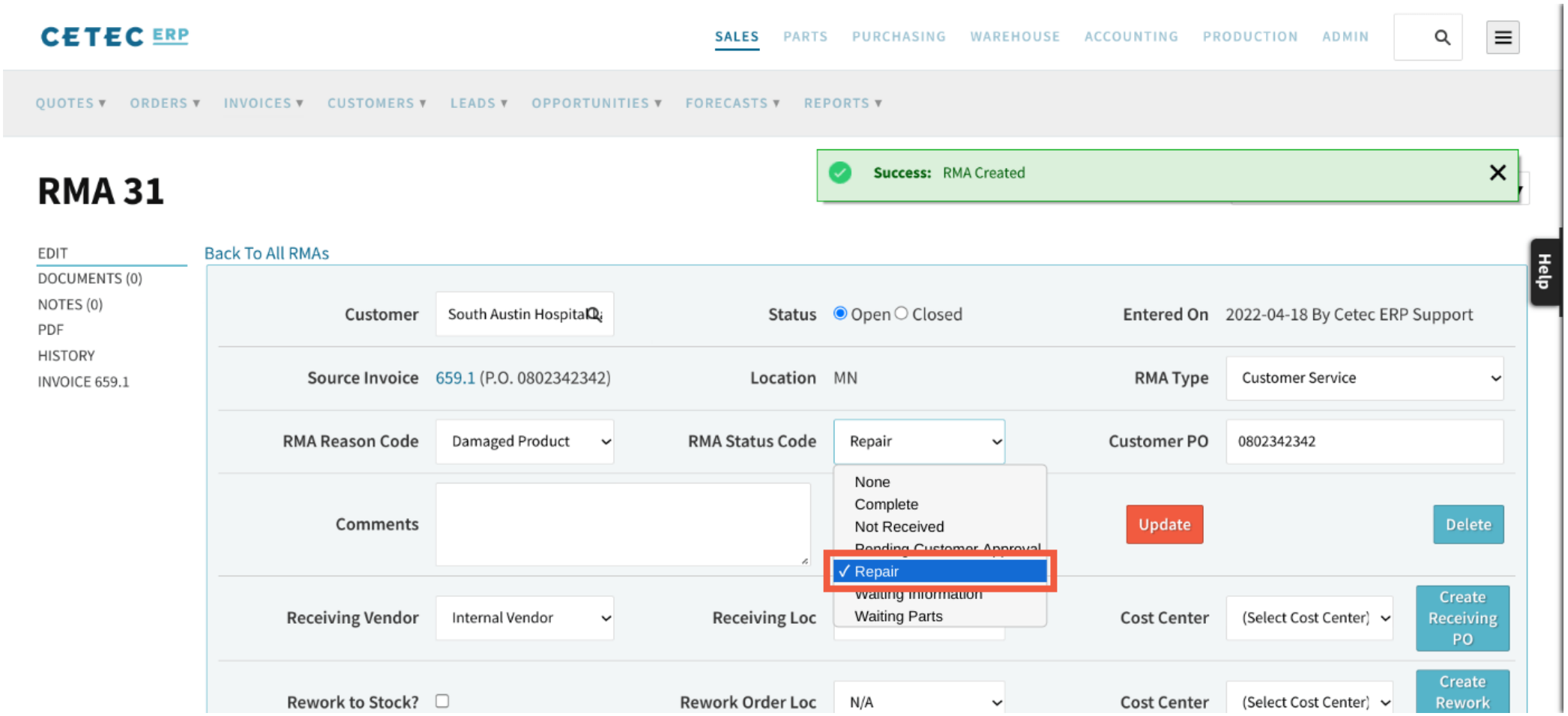
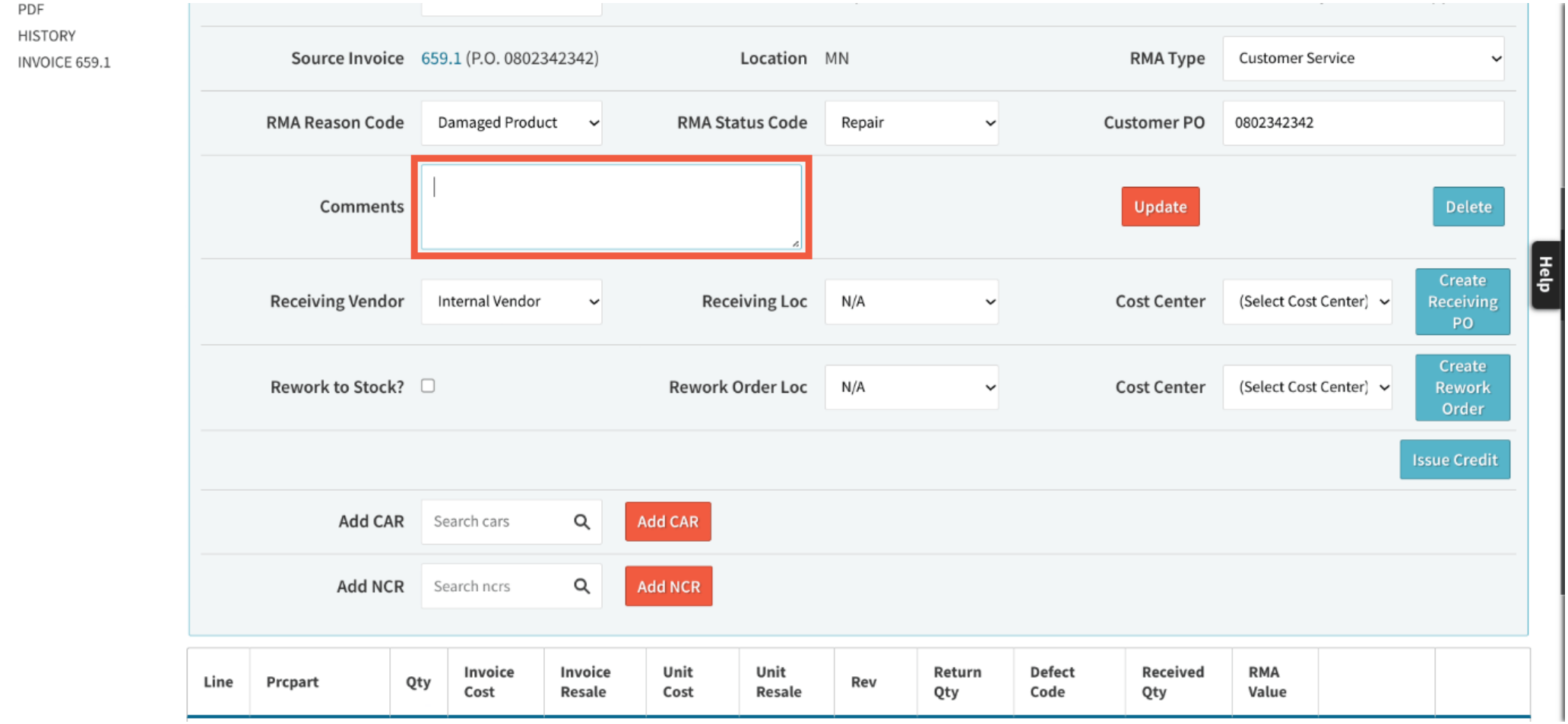
REPORTS
RMA 31
Success: RMA Created
EDIT
DOCUMENTS (0)
NOTES (0)
PDF
HISTORY
INVOICE 659.1
Back To All RMAs
Help
Customer
South Austin Hospital
Status
Open
Closed
Entered On
2022-04-18 By Cetec ERP Support
Source Invoice
659.1 (P.O. 0802342342)
Location
MN
RMA Type
Customer Service
RMA Reason Code
None
RMA Status Code
None
Customer PO
0802342342
Comments
Update
Delete
Receiving Vendor
Internal Vendor
Receiving Loc
N/A
Cost Center
(Select Cost Center)
Create Receiving PO
Rework to Stock?
Rework Order Loc
N/A
Cost Center
(Select Cost Center)
Create Rework

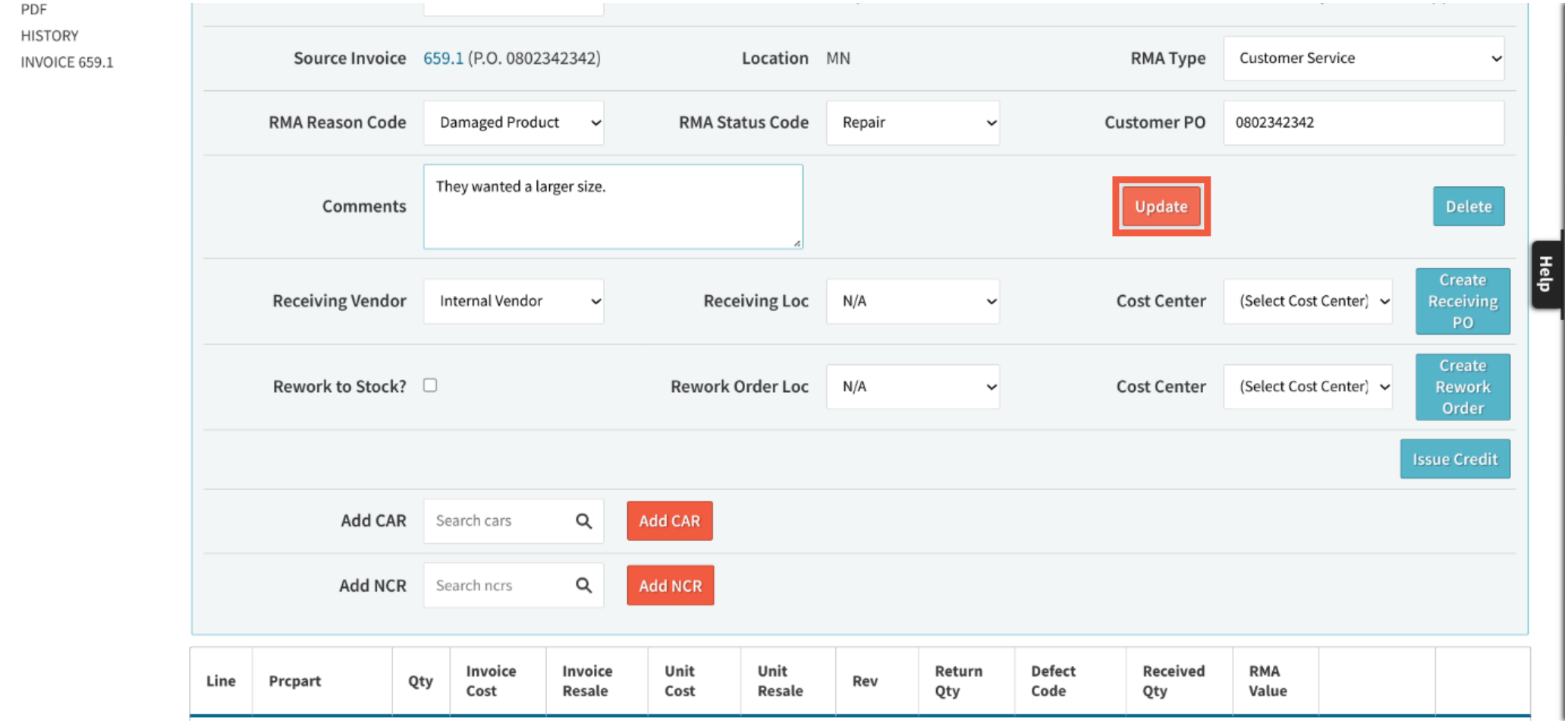

CETEC ERP
SALES
PARTS
PURCHASING
WAREHOUSE
ACCOUNTING
PRODUCTION
ADMIN
QUOTES
ORDERS
INVOICES
CUSTOMERS
LEADS
OPPORTUNITIES
FORECASTS
REPORTS
RMA 31
Success: RMA Created
EDIT
DOCUMENTS (0)
NOTES (0)
PDF
HISTORY
INVOICE 659.1
Back To All RMAs
Help
Customer
South Austin Hospital
Status
Open
Closed
Entered On
2022-04-18 By Cetec ERP Support
Source Invoice
659.1 (P.O. 0802342342)
Location
MN
RMA Type
Customer Service
RMA Reason Code
Damaged Product
RMA Status Code
None
Customer PO
0802342342
None
Damaged Product
Label
Comments
Update
Delete
Receiving Vendor
Internal Vendor
Receiving Loc
N/A
Cost Center
(Select Cost Center)
Create Receiving PO
Rework to Stock?
Rework Order Loc
N/A
Cost Center
(Select Cost Center)
Create Rework


CETEC ERP
SALES
PARTS
PURCHASING
WAREHOUSE
ACCOUNTING
PRODUCTION
ADMIN
QUOTES
ORDERS
INVOICES
CUSTOMERS
LEADS
OPPORTUNITIES
FORECASTS
REPORTS
RMA 31
Success: RMA Created
EDIT
DOCUMENTS (0)
NOTES (0)
PDF
HISTORY
INVOICE 659.1
Back To All RMAs
Help
Customer
South Austin Hospital
Status
Open
Closed
Entered On
2022-04-18 By Cetec ERP Support
Source Invoice
659.1 (P.O. 0802342342)
Location
MN
RMA Type
Customer Service
RMA Reason Code
Damaged Product
RMA Status Code
Repair
Customer PO
0802342342
None
Complete
Not Received
Repair
Waiting Parts
Comments
Update
Delete
Receiving Vendor
Internal Vendor
Receiving Loc
Cost Center
(Select Cost Center)
Create Receiving PO
Rework to Stock?
Rework Order Loc
N/A
Cost Center
(Select Cost Center)
Create Rework

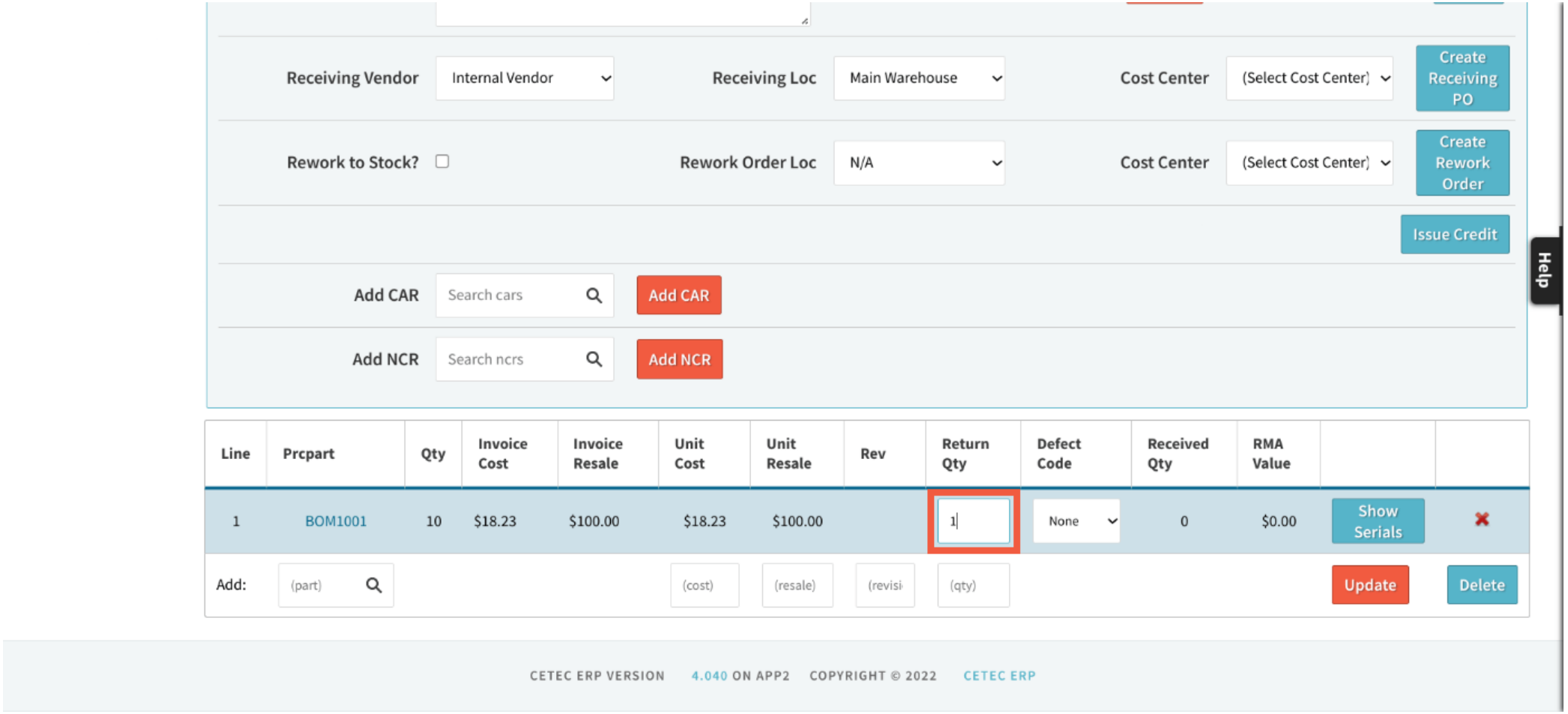
You can enter comments here.



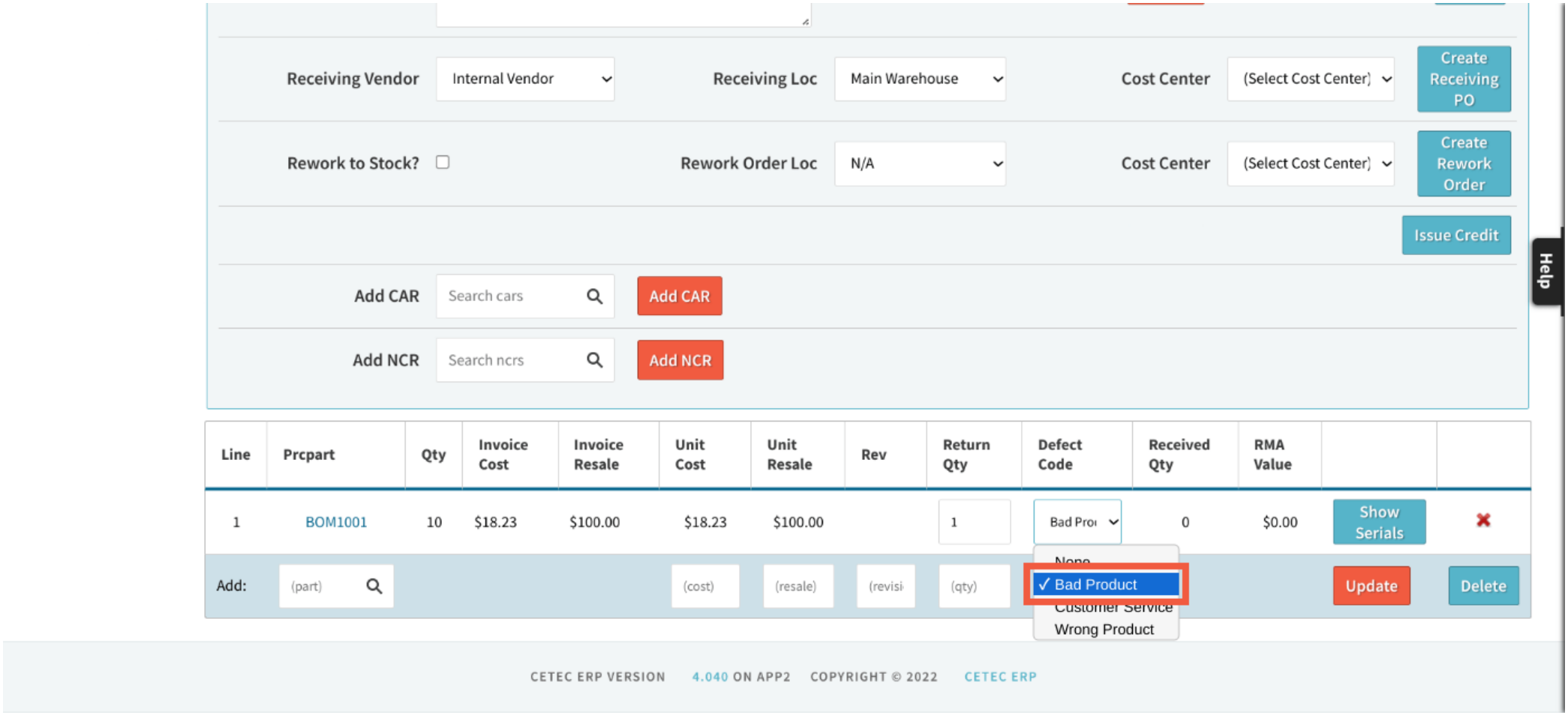
To save your comments, click Update here.



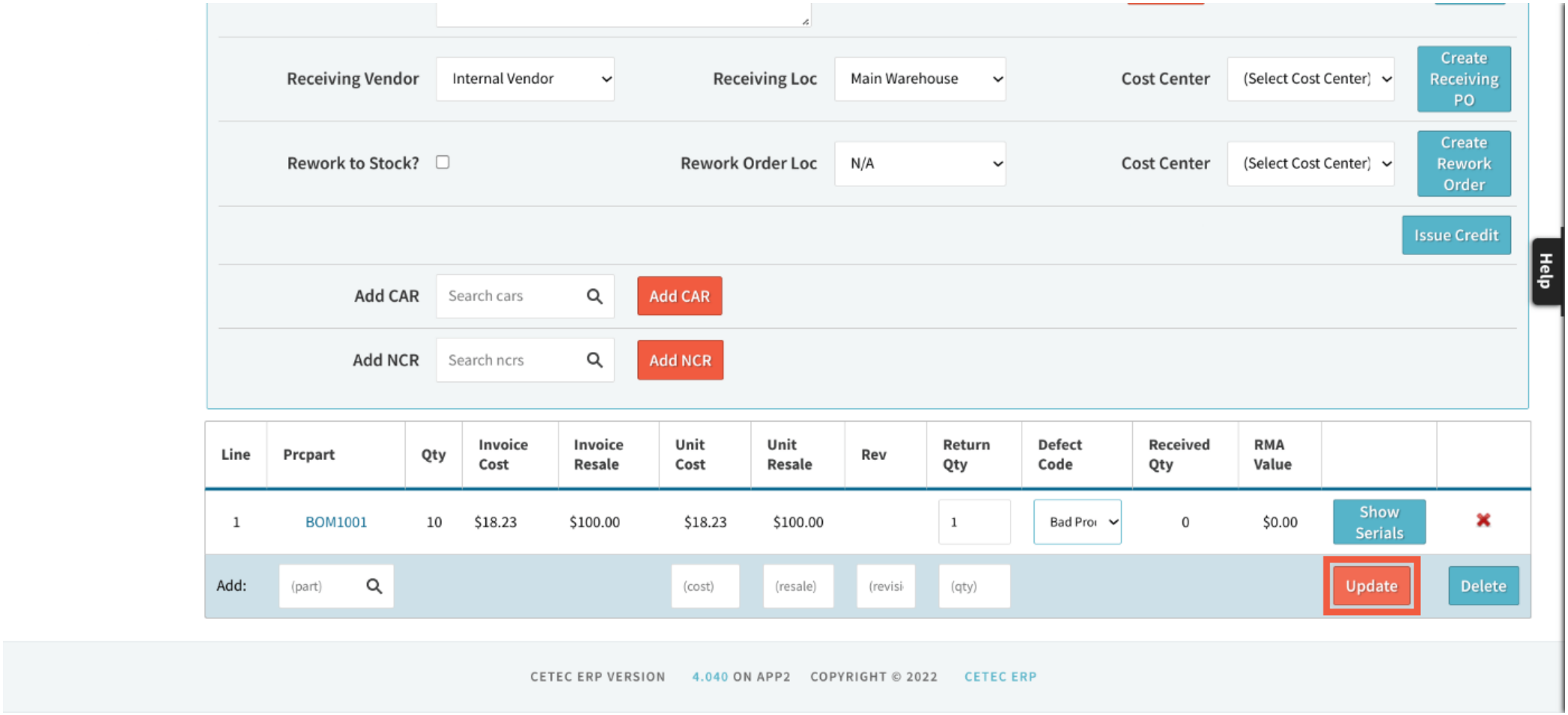
Before you can create a receiving PO or a rework order, you need to fill out this line. Enter the return quantity



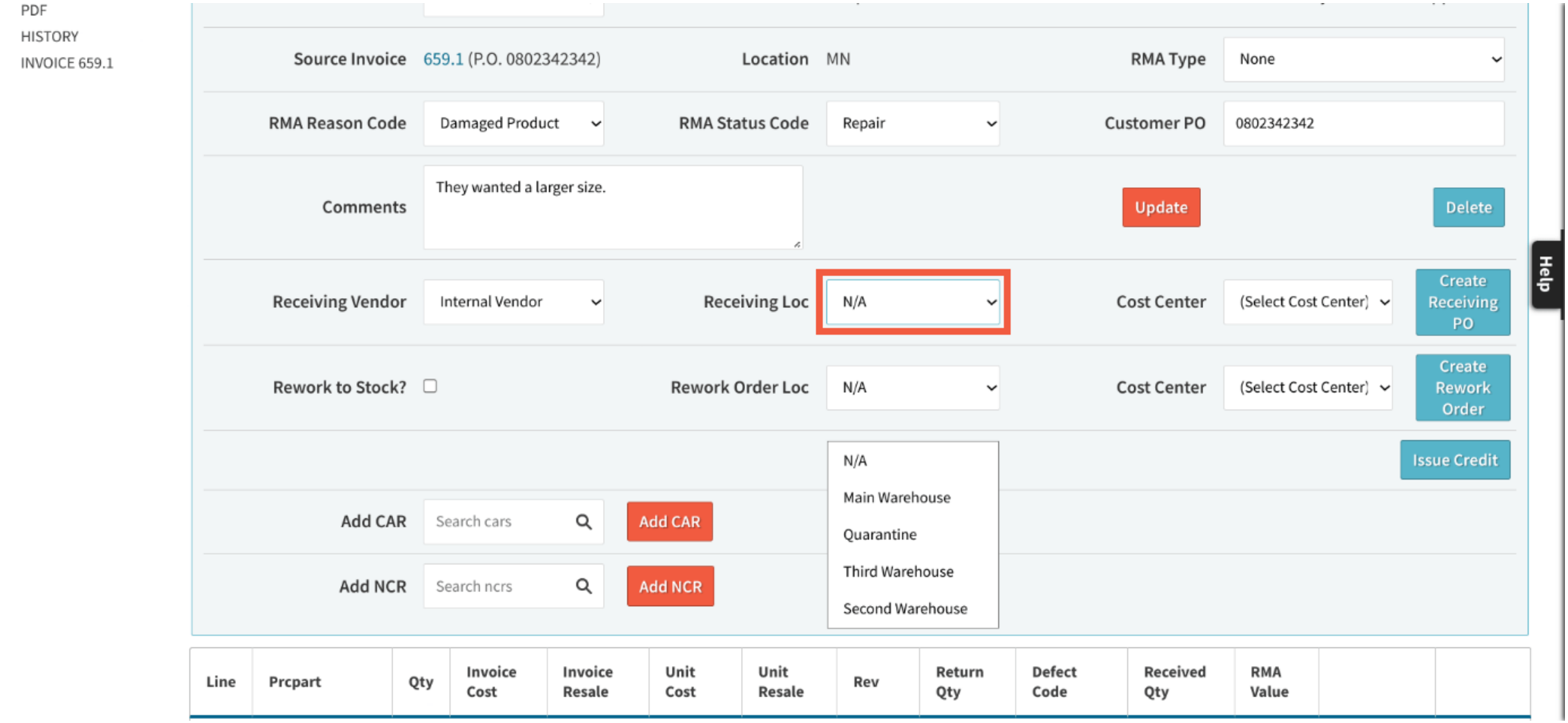
and the defect code.



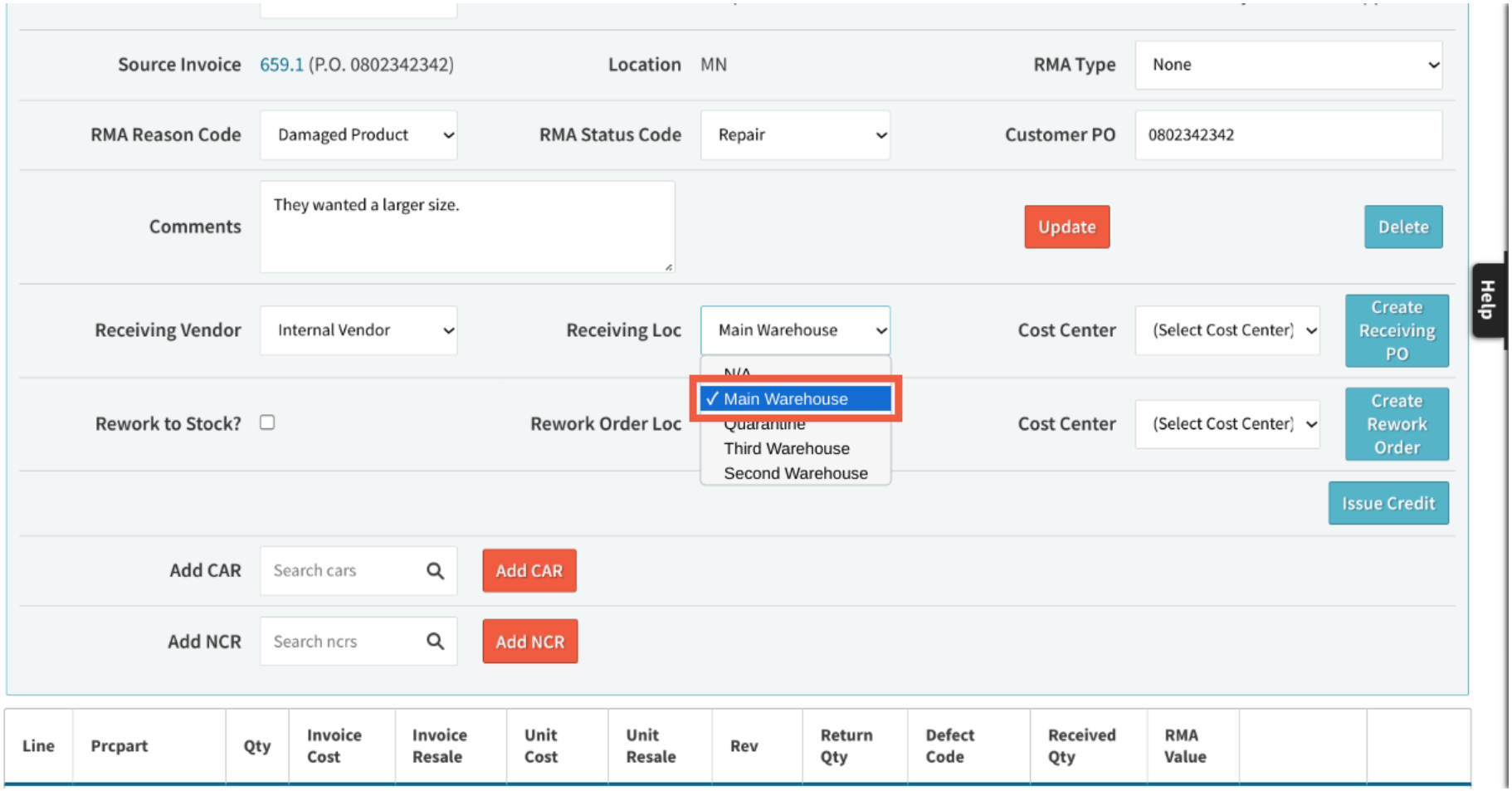
To save your changes, click Update.



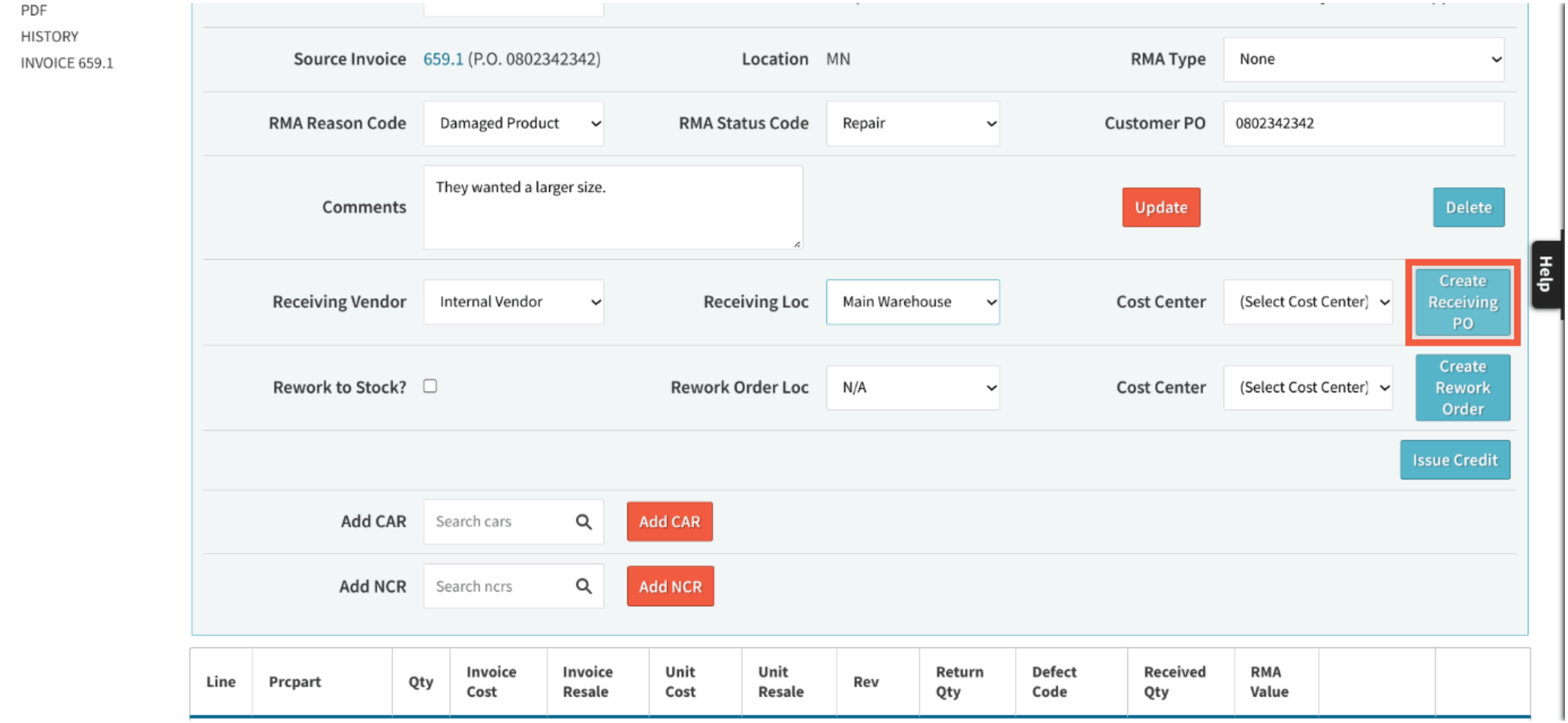
Now you have the option of creating a receiving PO by filling in this line of the form.



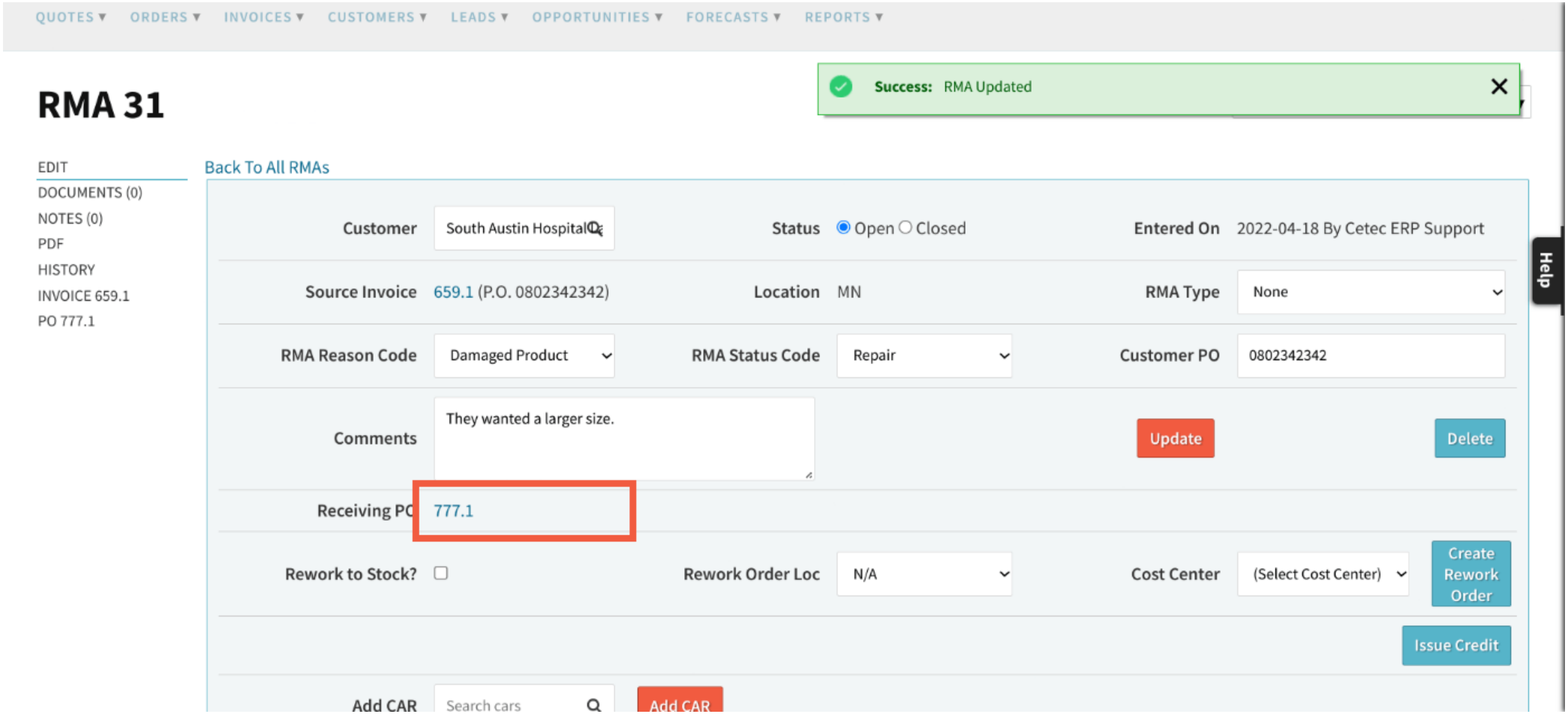
PDF
HISTORY
INVOICE 659.1



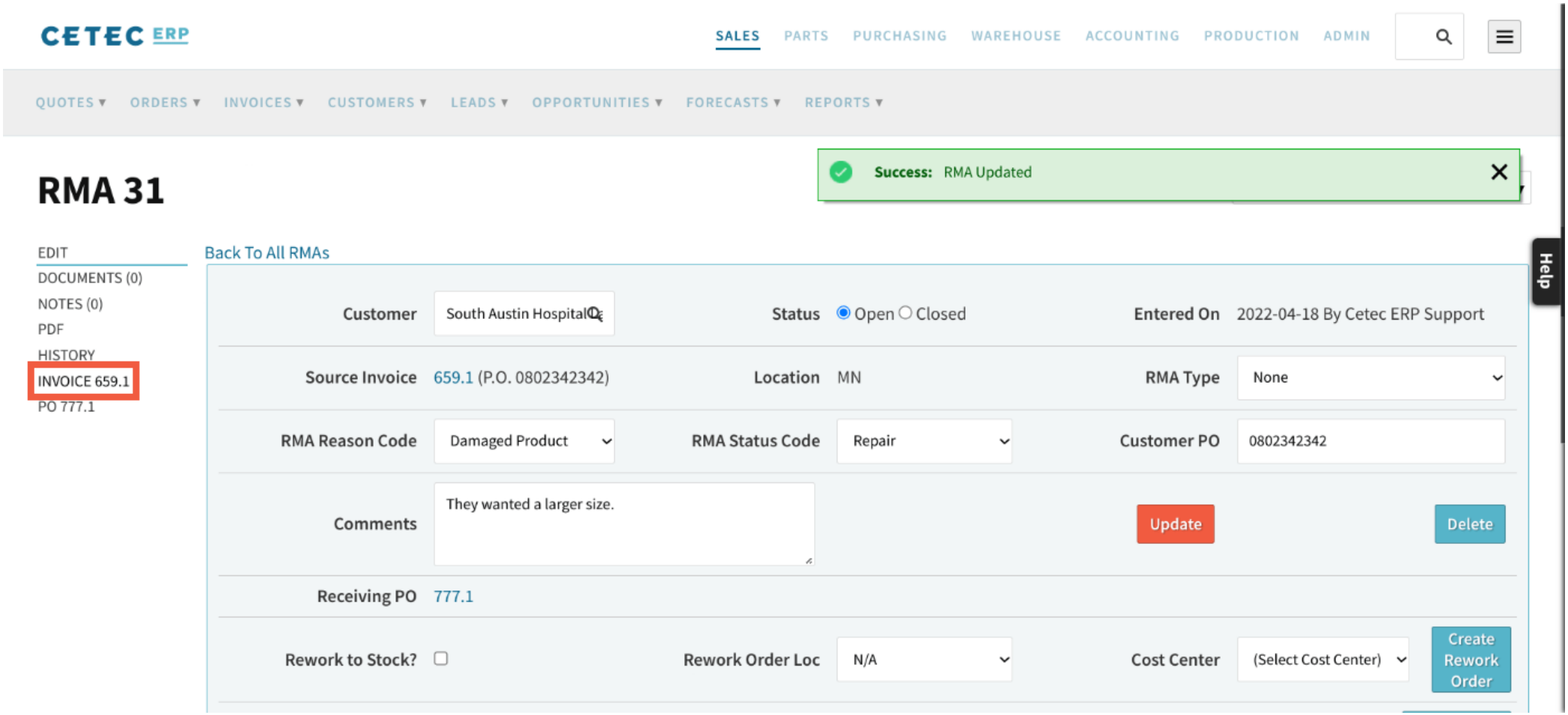
Once you've filled in the appropriate fields, click Create Receiving PO.



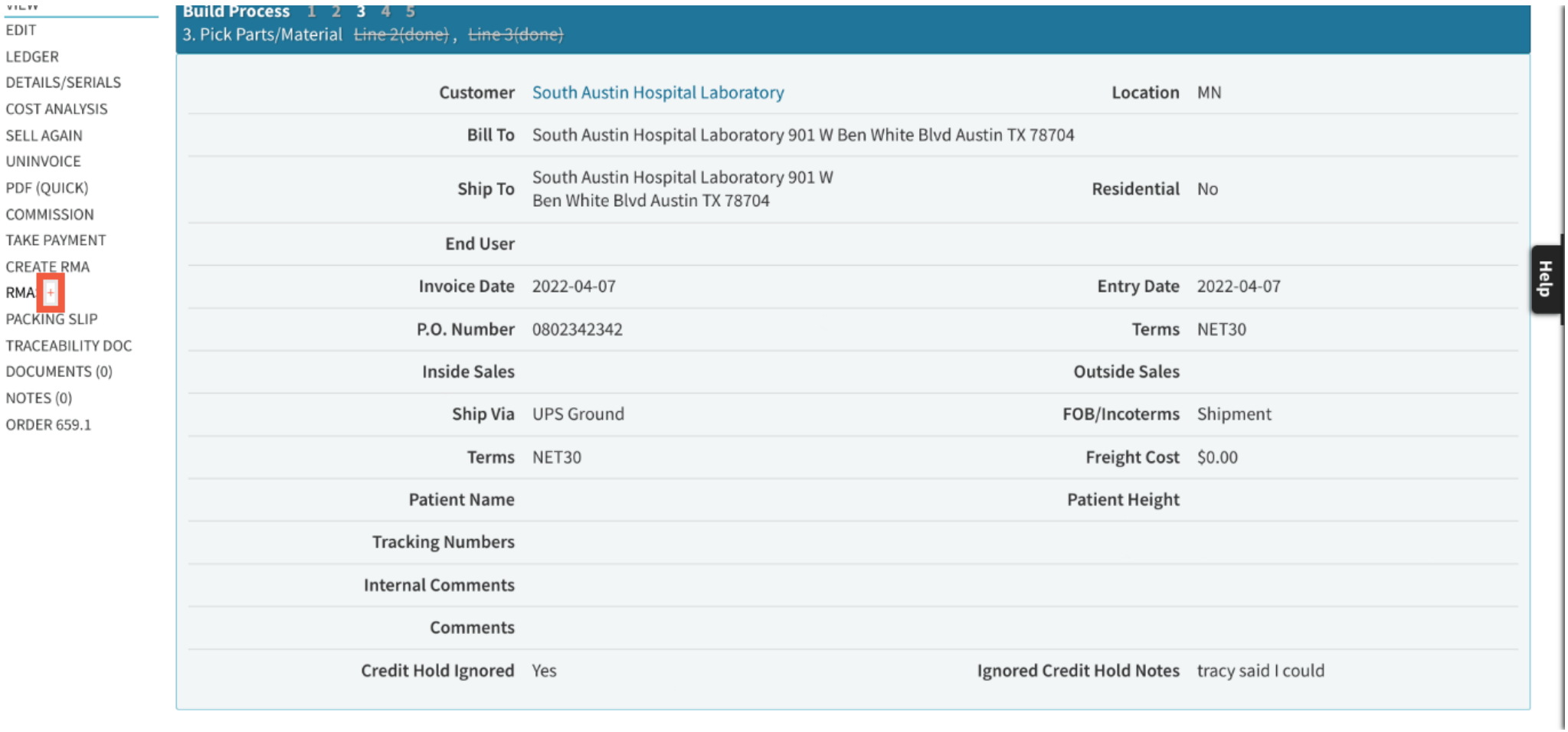
A link will appear here for your new receiving PO. Now you can quickly access it here in the RMA screen.



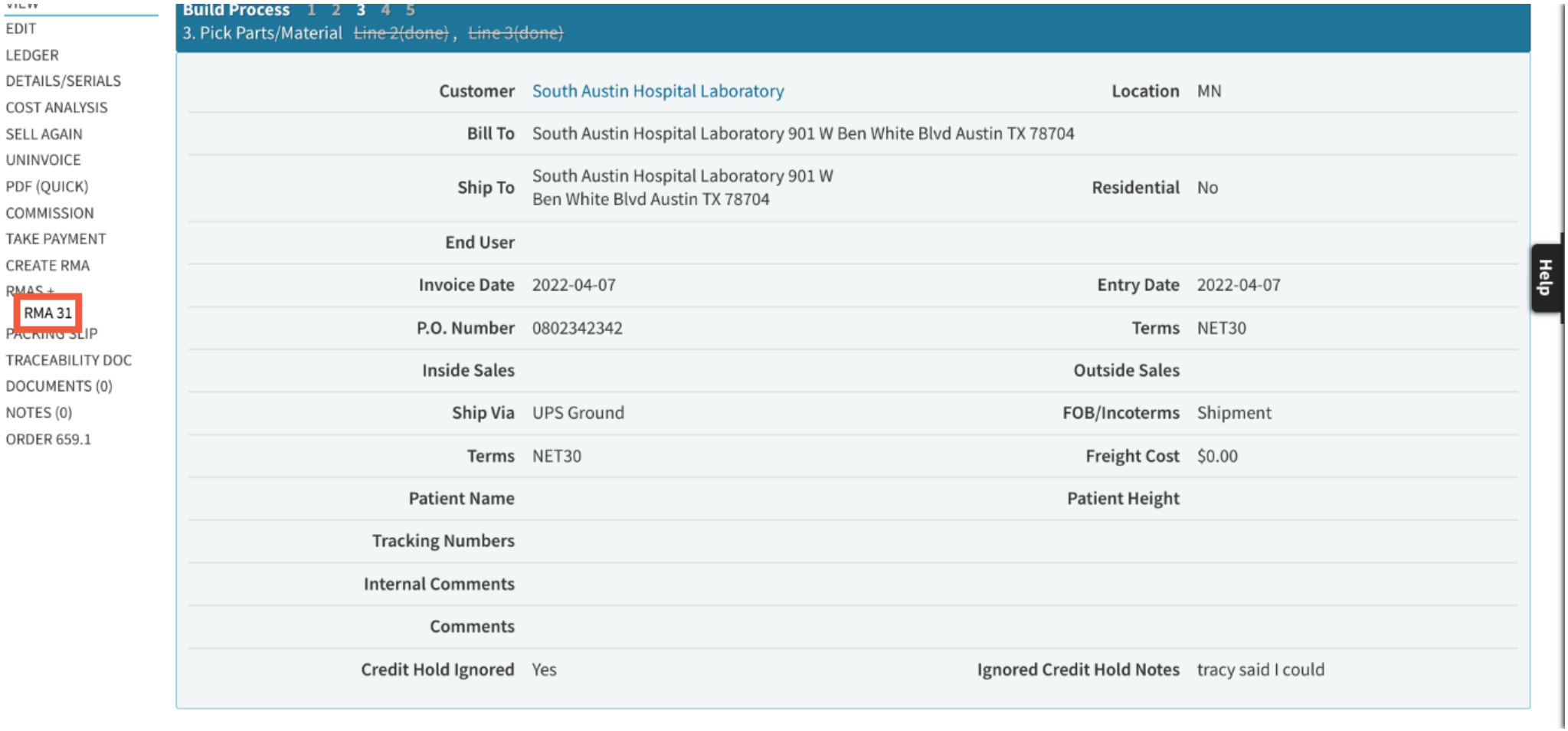
From the RMA screen, you can easily get to the invoice for the associated order.



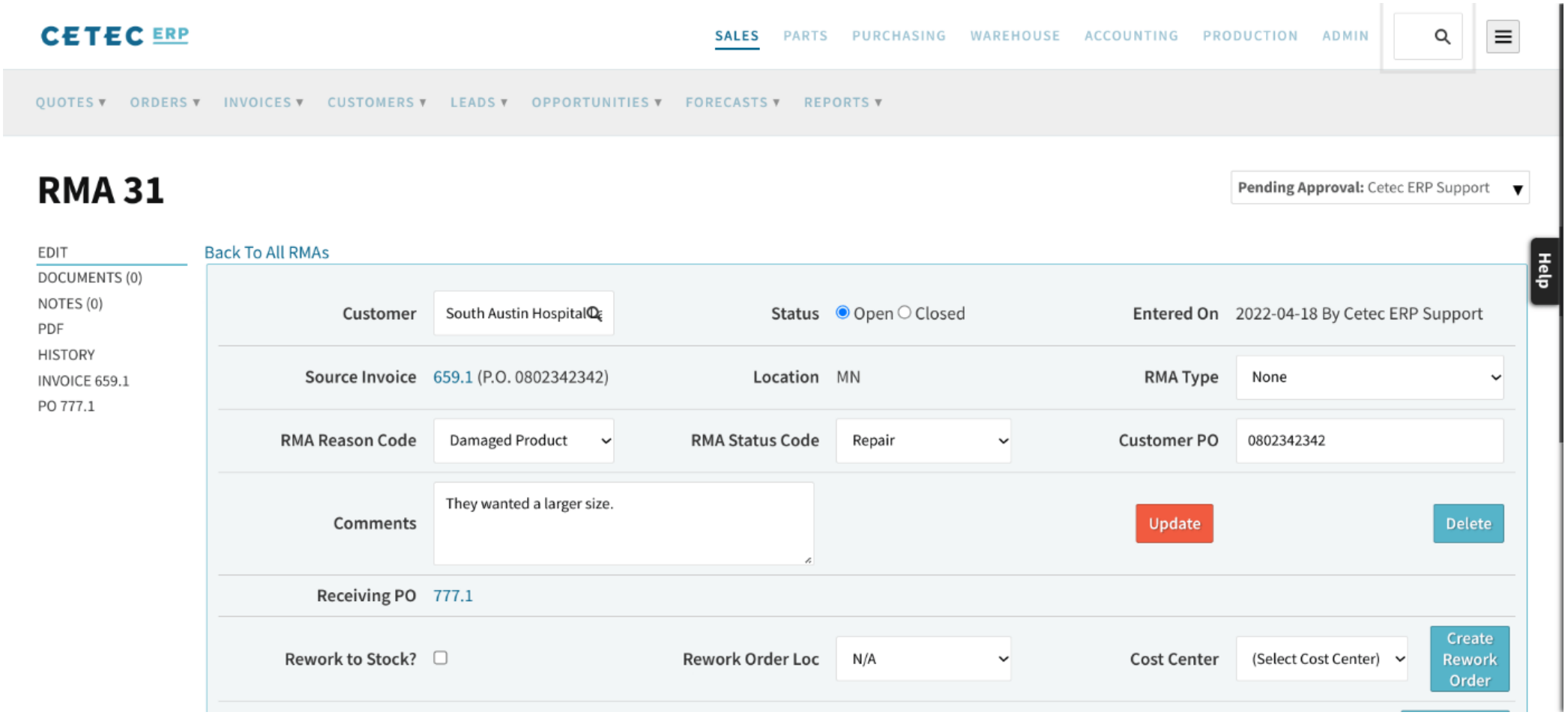
And from the order screen, you can easily get to your RMA(s) by clicking the plus sign here

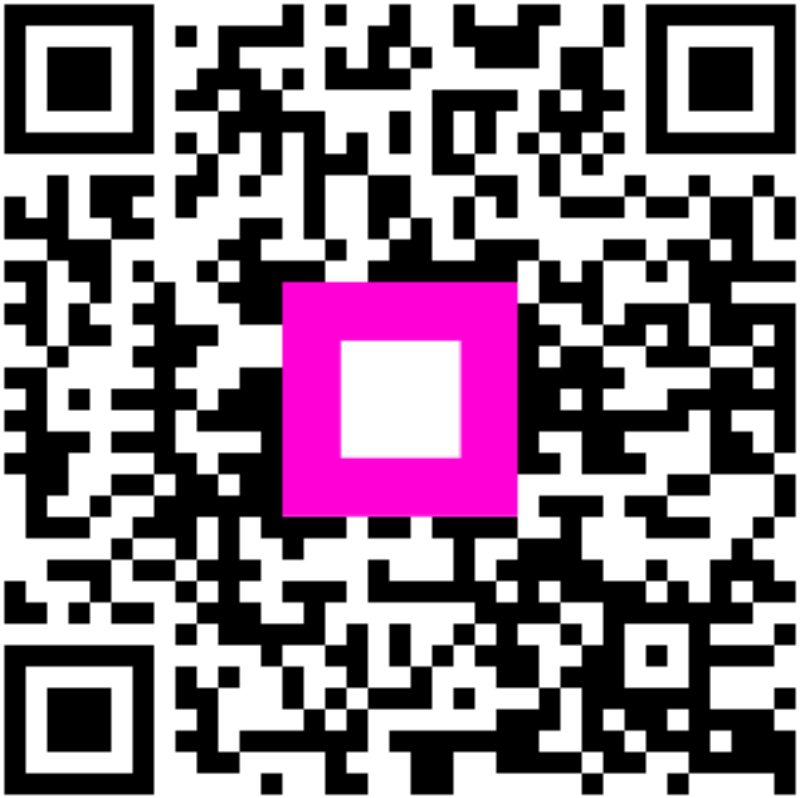


and then clicking on the RMA you want.



That's it. Now you can create an RMA in Cetec ERP!





Scan to go to the interactive player