

# PROCEDURE

NUMBER: XX-0XXX	EFFECTIVE DATE:
TITLE: RMA Corporate Procedure	PAGE: 1 of 4
	REVISION: A

## 1.0 PURPOSE & SCOPE:

**PURPOSE:** To outline the requirements for returned material from the customer.

**SCOPE:** To handle product returns that is not classified as nonconforming, for credit only (customer buyback) and returns from customer demonstrations.

## 2.0 RESPONSIBILITY (OR DEFINITIONS):

“Used” material – Material that has not been put into operation by the customer.

UAI – Use As Is

RMA – Return Material Authorization

## 3.0 REFERENCES:

## 4.0 RELATED ACTIVITIES:

## 5.0 ATTACHMENTS:

- 5.1 [RMA Corporate Flowchart](#)
- 5.2 [RMA Authorization Form](#)
- 5.3 [REQUEST FOR OBSOLESCENCE Form](#)
- 5.4 [RMA TAG](#)

## 6.0 TOOLS/TEST EQUIPMENT REQUIRED:

## 7.0 REVISION HISTORY:

Revision	Date	Reason for Revision:
A		NEW

## 8.0 PROCEDURES (OR) TASKS:

- 8.1 The Sales Department will authorize material to be returned from the customer and assigns an RMA to the product.
- 8.2 Once the material arrives back to the plant, the material will be reviewed to determine if it is built in the existing plant.
  - 8.2.1 If the material is found to be built in another facility, then the other plant is contacted and material will be sent to them for disposition.

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TITLE:	TITLE:	TITLE:
Signature:	Signature:	Signature:

8.2.2 For OEM material refer to the OEM procedure.

8.2.3 If the current part is still within the warranty period, the material is dispositioned following the next steps.

8.3 Receiving Department will verify RMA Number, Part Number, Quantity, dollar amount, and moves product in Dataworks to MB with discrepancies noted.

8.3.1 If Receiving determines the total cost of an RMA (including all part numbers per vendor) to be under \$250, these parts may be scrapped using the proper scrap procedure

8.4 After the Receiving Department section is completed then the QA Department verifies: Revision of the product to the current revision in Dataworks, suggest scrap for non-useable product, Rework/Retest, or UAI. Also, a copy of the RMA paperwork with evaluation is sent back to the Sales Department.

8.4.1 Product that is deemed scrap should be returned to the Shipping Department in order to complete Scrap/Obsolete paperwork. (Attachment 5.3)

8.4.2 Product that is UAI has two alternatives

8.4.2.1 If there is no issue then the vendor signs RMA, and Shipping Department work is complete, and gives material to Shipping or the QA audits and signs RMA.

8.4.2.2 Shipping Department disposition material as they see fit. If the Shipping department cannot disposition product at present time they will generate an RMA tag to move material to the CR account after QA signs and dates tag.

8.4.2.3 If there are issues then the QA personnel will move material out of MB, give product to appropriate supervisor to complete testing of product.

8.4.2.4 Supervisor needs to obtain rework paperwork from Master Scheduling personnel and retest.

8.4.2.5 Supervisor informs QA and Shipping Department work is complete, signs RMA, and gives material to Shipping once QA audits and signs off the RMA.

8.4.2.6 Product is given back to the Shipping department to disposition as they see fit. If the Shipping department cannot disposition product at present time they will generate an RMA tag to move material to the CR account after QA signs and dates tag.

8.4.3 Product that is considered Rework/Retest material needs to have a Rework Work Order issued from Master Scheduling personnel prior to upgrade. If product is OEM and retest in house is not possible, Purchasing Department will return to supplier in order to be recertified. Once tested, and passes it will be returned. Fall-out will be noted.

8.4.3.1 QA personnel will move material out of MB; give product to supervisor so they may obtain rework paperwork. Shipping will insure Dataworks transaction and location has been changed.

8.4.3.2 Supervisor completes rework and retest. 10% of product is tested **UNLESS**  
corrected to their 100% test before

8.4.3.3 Supervisor, QA and shipping department work complete, signs RMA,  
and gives material to shipping once QA audits and signs on the RMA.

**Credit / Debit Memo and Return Authorization Form**

**RMA #** \_\_\_\_\_

**Bill-To Number** \_\_\_\_\_ **Ship-To Number** \_\_\_\_\_

**Customer Name** \_\_\_\_\_ **Shipping Location/Plant** \_\_\_\_\_

**State** \_\_\_\_\_ **City** \_\_\_\_\_

**Sales Order Number** \_\_\_\_\_ **Customer Purchase Order Number** \_\_\_\_\_

**Original Invoice Number / Date** \_\_\_\_\_

**Reason for Credit:**

- Pricing CS
- Discount Change
- Overship (Plant Location) \_\_\_\_\_
- Return of EXCESS Stock
- Returned due to customer ordered wrong equipment
- Ordered cancelled/returned after LATE shipment
- Invoicing Error
- Manufacturing Error
- Shortship (Plant Location) \_\_\_\_\_
- Wrong Equipment Sent (Plant Location) \_\_\_\_\_
- Other Misc. Reasons

S.O. Line #	Part Number	Qty.	Unit Price	Extended Price
<input type="checkbox"/> Mark if continued to Page 2				
<b>Sub-Total</b>				
<b>Sales Tax</b>				
<b>Freight</b>				
<b>Grand Total</b>				

**Approvals:**

**Director of Sales (up to \$1000)** \_\_\_\_\_ **Date:** \_\_\_\_\_

**VP of Sales (over \$5000)** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Controller (over \$100,000)** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Receiving Department** \_\_\_\_\_ **Date:** \_\_\_\_\_

**QA Department** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Issued By** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Stock Room (Returned to stock by)** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Remarks:** \_\_\_\_\_