

## Create Service Request

### Depot Repair Responsibility

- N → Service Request → Service Request → Create Service Request
- Select Customer
  - Use Customer NAME field in Customer Type column
- Select Item
- Confirm Type = Depot Repair
- Enter Severity of Repair
- R → Workbench
- Enter Problem Summary
- R → Addresses
- Confirm Bill To info
- Confirm Ship To info
- Click Save
- Note Service Request number that has been generated

If you have solved the problem, you can enter Resolution Summary, change the Status to Closed and Save your work

## Issue Return Material Authorization (RMA)

### Depot to Repair Responsibility

- COMPLETE STEPS A - L IN THE CREATE SERVICE REQUEST PROCESS
- R → Charges
- T → Action
- Activity = Return for Repair + Org #
- Enter the Item number
- Enter Reason
- T → Bill To
- Verify Account Number and Address
- T → Ship To
- Verify Account Number and Address
- T → Submit Order
- Enter Shipping/Receiving Warehouse
- Save your work
- B → Submit
- T → Order Status
- Note the number in the Order Number field. THIS IS THE RMA NUMBER TO BE GIVEN TO THE CUSTOMER

## Enter Repair Order

### Depot to Repair Responsibility

- N → Order Management → Orders, Returns → Order Organizer
- Enter RMA # in Order Number field
- B → Find

- B → Open Order
- Review Customer info and change if necessary
- Enter Customer PO # for Repair
- Add/Change Ship Method if necessary
- Confirm Salesperson = No Sales Credit
- R → Line Items
- T → Main
- Enter Estimated Repair Turnaround Date in Schedule Ship Date Field
- Save your work
- B → Book Order
- B → OK
- N → Depot Repair → Repair Orders
- Enter Service Request Number
- B → Search
- B → OK
- B → OK in response to question: Do you want to create a Repair Order or associate RMA/sales order lines
- Check the box to the left of the RMA
- B → OK

## Receive Returned Items

### Depot to Repair Responsibility

Make sure all steps to create a Repair Order (See Above) have been completed

- T → Receive/Ship
- Check the Process Txn box to the left of the RMA line
- B → Receive
- T → Customer
- Enter the RMA number
- B → Find
- Close Receipt Header window
- Check the box to the left of the line(s) to receive
- Confirm the Qty
- Enter RPR-RCV in Subinventory field
- Enter Locator if required
- If the item is Lot controlled:
  - B → Lot/Serial
  - Enter Lot/Serial number
- Save your work
- Close the window to return to the Repair order window
- M → Tools → Update Receiving

## Assign Service Req to Group or Employee

### Depot to Repair Responsibility

- N → Service Request → Service Requests → Create Service Requests
- Find your service request
- L → Group to assign the SR to a particular group

- L → Owner to assign the SR to a particular employee
- Severity may be changed if necessary
- Save your work

## Print Service Request

### Depot to Repair Responsibility

- N → Service Request → Service Requests → Create Service Requests
- Find your service request
- M → Tools 1 → Print Request

You may copy contents to an e-mail and forward copy to customer if desired

## Enter Repair Charge Estimate

### Depot to Repair Responsibility

- N → Depot Repair → Repair Orders
- Customer Type = Organization
- Enter Sales/RMA number
- B → Search
- B → OK
- TAB → Repair
- Enter 1 for Lead Time
- Enter Day for UOM
- B → Save Estimate
- Enter Billing Category
- Enter Product or Service
- Confirm Price List
- Confirm UOM
- Enter QTY
- B → Save Estimate
- B → Estimate Notes (Mandatory)
- Enter Notes in right hand panel. Include:
  - Description of Repair
  - Parts and Labor costs
- Click Descriptive flexfield
- Enter Warranty Code
- Enter Defect Code
- Enter Labor Hours
- B → OK
- Save your work
- To print estimate:
  - M → Tools → Print Estimate
- Close all Forms

## Approve/Authorize Estimate

### Depot to Repair Responsibility

N → Depot Repair → Repair Orders

- Find the Repair order
- TAB → Repair Estimate
- L → Status = "Accepted"
- L → Reason = Estimate Approved
- Save your work

## Create Charge Order

### Depot to Repair Responsibility

Once the estimate is approved, and the cost is final

- N → Depot Repair → Repair Orders
- TAB → Repair Estimate
- B → Freeze Estimate
- B → OK
- M → TOOLS → Update Repair Job

