AccountMate
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Article # 1207

Technical Note: Benefits of the Return Authorization (RA) module

Difficulty Level: Beginner AccountMate User

Version(s) Affected: AccountMate 6.5 for SQL and MSDE

Module(s) Affected: AR, RA

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DESCRIPTION

Companies engaged in selling products often encounter situations that may result in a customer returning items that they purchased. There are various reasons that the customer may return items. The items may be defective; there may be a mistake in the order; or the customer may simply decide that the items are no longer needed. The Return Authorization (RA) module is specially equipped to track customer returns from the time the customer calls for the authorization to return the product until the time a replacement has been sent or a credit has been recorded. This document presents the advantages of using the RA module over using the Accounts Receivable (AR) module to handle customer returns.

SOLUTION

There is a large variety of reasons for which customers return items. Although the AR module has the capability to record a sales return, it does not have the ability to record and track the reasons for which an item is returned. Awareness of the cause of such returns can help you determine whether a problem exists with a particular item, with a shipping method or with your own shipping procedure. Obtaining this information without the RA module's features can be a time consuming, tedious process.

Customer returns affect your inventory value. To be certain that inventory is properly updated you must record a sales return for the goods your customer is returning; then, if you replace the items you must record the shipment. If the items you send to the customer are substitutes with different item numbers you will need to perform even more procedures to maintain accuracy in your inventory.

Tracking customer returns without RA requires duplication of effort. To evaluate your returns for patterns, in addition to entering a sales return in AR, you must also enter by a different method the same information that was required for the sales return. Depending on the method you choose, recording and tracking return information may be extremely complex.

Using the RA module you can, by entering a single document, quickly and efficiently record the return, update inventory, handle the appropriate AR functions and track the return status. Return Codes handle the various types of returns. Whether the customer is returning goods for **credit**, **replacement**, **substitution** or **repair**, assigning one of the provided return codes will facilitate each return's particular requirements. Reports in the RA module are designed to provide information about each of your returns. When you return a repaired item, replace an item, or send a substitute item you can simply ship the item; then, complete the return and AccountMate will properly update all the related information. There is no need to duplicate this information in a spreadsheet, if that is the method you chose, in order to track the return or record it for evaluation purposes.

Using the RA module's features to process customer returns will save time, simplify the process and ensure that your returns are effectively and efficiently completed.