FASTENING SOLUTIONS, INC. · SALES REPRESENTATIVE GUIDANCE

INTERNAL USE ONLY

INITIATE RMA REQUEST — NETSUITE STEPS

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BEFORE YOU BEGIN

Complete **Step 1 (Returns Policy Guidance)** and **Step 2 (RMA Gate Check)** first. If a policy exception is required, get **RSM approval** before submitting and note the approval in the RMA Explanation Comments field.

WHERE TO START

On your NetSuite home dashboard, under **Tiles**, click **Initiate RMA** to submit any return request except a Counter Return, which is still processed at the branch. This opens a **Task** record (Task Type: **FSI – Initiate RMA**). Saving the form sends it to Customer Service, **who own the process from there**: they verify your request, coordinate with Operations/Purchasing as needed, issue the RMA number, monitor receipt, and generate the credit memo. Your job is to submit the request correctly and completely, with enough context for Customer Service to act on it right away.

RETURNING VS. REPAIRING A TOOL

If the issue is a tool that needs repair rather than a return, use **Tool Repair Ticket** instead of Initiate RMA.

1 PRIMARY INFORMATION

REQUIRED FIELDS

- Sales Order #
- Customer Name
- Requester (fills automatically)
- RMA Reason Code
- RMA Return Location
- RMA Pickup Method

CHECKBOXES & FLAGS

- **Waive Restocking Fee** — check if applicable (see reference table below)
- **Drop Ship / Special Order** — check if applicable. **Contact Purchasing before submitting** if returning a Drop Ship or Special Order item
- Sales Rep – SD (select from drop-down)

LEAVE THIS BLANK

The form includes an **RMA Number** field marked “Customer Service to Populate.” Do not fill this in — Customer Service assigns it once your request is reviewed.

REASON CODE DRIVES EVERYTHING

The Reason Code you select determines the restocking fee default and whether additional fields appear later in the form (Defective Product opens a required Return Information section — see Page 3).

REASON CODE QUICK REFERENCE

Complete List

REASON CODE	WHEN TO USE IT	RESTOCKING FEE
Customer Refused Delivery	Correct product/shipment, customer simply won't accept it	Applies (Waivable)
FSI Order Entry Error	FSI entered the order incorrectly (qty, address, account, etc.)	Auto-Waived
Customer Does Not Want Excess	Overshipment caused by the customer's own order error	Applies (Waivable)
Shipped Wrong Item	FSI sent the wrong product	Auto-Waived
Undershipment	Customer received less product than invoiced	Auto-Waived
Over Ship: Excess Product	Overshipment caused by an Operations fulfillment error	Auto-Waived
Over Ship: Shipped Wrong Address	Product shipped to the wrong address due to an FSI error	Auto-Waived
Damaged Before Transit	Product arrived damaged, whether or not it's being returned	Auto-Waived
Damaged / Lost in Transit	Product lost or damaged in transit, never received by customer	Auto-Waived
Customer Ordered Wrong Product	Customer error, not FSI's	Applies (Waivable)
Does Not Fit Customer's Use	Product doesn't suit the application it was bought for	Applies (Waivable)
Defective Product	Manufacturer defect, not sellable — opens Return Information section (Page 3)	Auto-Waived

RESTOCKING FEE DEFAULTS

Fees are **automatically waived** for FSI order entry errors, shipping errors, damaged items, faulty/defective items, and tools on trial returned within the trial period. For a customer-caused return, a Sales Rep **may** waive the fee at their discretion — explain why in the RMA Explanation Comments field.

2 ADDITIONAL INFORMATION & COMMENTS

ITEMS BEING RETURNED

- Up to 10 line items — Item, Quantity, and Unit Price for each
- Leave unused item rows blank

RMA EXPLANATION COMMENTS — REQUIRED

- Explain what happened so Customer Service can identify the correct internal return procedure
- If waiving a restocking fee for a customer-caused return, state why
- Note any RSM-approved policy exception

3 DEFECTIVE PRODUCT — RETURN INFORMATION

Only Appears if Reason Code = Defective

Selecting **Defective Product** as the Reason Code opens a required **Return Information** section so Purchasing can review the claim.

REQUIRED

- **Issue Type** — select all that apply: Fastener Issue, Tool Issue, Packaging Issue
- Vendor/Supplier Date Code
- Tool Brand/Model
- Country of Origin
- **Problem Checklist** — select all that apply (e.g. Part Defect, Part Failure, Unusual Wear, Jams in Magazine/Nose, Collation Seems Bad, Angle Seems Wrong, and more)
- Problem Description (free text)

ADDITIONAL — IF APPLICABLE

- Vendor
- Material Type
- Air Pressure
- Hose Length
- Operating Temperature
- Resolution

AIR TOOL FIELDS

Air Pressure, Hose Length, and Operating Temperature only apply to pneumatic tools — leave blank if not relevant to the item being returned.

STILL REQUIRES AN RMA NUMBER

Saving a Defective Product request sends an email to Purchasing for review. **Do not accept, commit to, or act on the return until an RMA number is issued.** From here, Customer Service and Purchasing own tracking the item (including quarantine placement and any vendor/warranty recovery) — you do not need to follow up on that internal process.

4 ATTACH PICS IF DAMAGED OR DEFECTIVE PROD

Use the attachment grid at the bottom of the Task form to attach photos for any **damaged** or **defective** product when applicable — select the file and click **Add**.

✓ WHAT HAPPENS AFTER YOU CLICK SAVE

Customer Service takes it from here — internal teams will reach out if more information is needed. For Defective requests, Purchasing is notified automatically; Customer Service follows up directly with them to move it along, logging notes on the request while it's pending (e.g., "working with Purchasing," "awaiting approval"). Once approved, Customer Service issues the RMA number, notifies the receiving branch to receive it in NetSuite, and Customer Service generates the credit memo.