

InFOREMAX RMA Management System 7.0 User's Guide



Welcome to the InFOREMAX RMA
Management System

*“Integrate a powerful e-business environment
today”*

InFOREMAX-based solutions enable your
electronic business programs and provide
new ways for you to enhance your customer
satisfaction and retention.

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Welcome to InFOREMAX

InFOREMAX is a return material authorization (RMA) software application that tracks product returns and repair estimates for service and manufacturing companies.

InFOREMAX tracks all steps of the return process, from initializing return tickets to completing repair details. When customers require replacement items to be sent in advance, InFOREMAX also helps you track those items. InFOREMAX not only provides the ability to track your customer RMA, but also it helps you to track your supplier RMA by tracking items returned to your suppliers for replacement or repair.

Unlike other RMA solutions, InFOREMAX allows you to assign specific parts to particular customers. As a result, you can manage different customers with their own unique parts lists. InFOREMAX also monitors RMA due dates and spare-part stock levels issuing a desktop alert whenever an RMA is overdue or a spare part falls below a pre-determined minimum stock level.

InFOREMAX stores the estimated cost and details of a repair. The software generates reports that can be used by management to assist the decision making process. These reports can range from the simple (product failure and RMA turnaround time analysis) to the complex (profitability and repair cost analysis).

Thanks to its custom fields and data import/export capabilities, InFOREMAX is fast and easy to deploy and configure.

Understanding InFOREMAX Main Screen

After you log into InFOREMAX, the main screen is displayed (see figure 1) and a desktop alert appears for overdue RMA (see figure 2). This is your primary interface when using the InFOREMAX solution.

Active RMA Statistics
Displays statistics in graphical format, showing the percentage of returns in each priority category, number of returns and their status, and overall RMA volume for the last six months.

Main Menu Options
Click on menu items to view submenu options or use the toolbar buttons for quick access to popular functions.

Main Navigation Pane
These buttons are used to add, view, or edit/modify data or to view reports.

Status Bar
Show current user's name and role.

Figure 1

Startup Page
The startup page provide all in one graphical access to the main functions of the InFOREMAX toolkit.

Desktop Alert
Warning messages appear to notify the active user of an overdue RMA or under-stocked spare part.

Alert Details
Click on this link to view detailed information.

Figure 2









About Main Toolbar

The Main toolbar provides quick access to common commands (See figure 3).



Figure 3

There are several types of command buttons in the Main toolbar.

-  **New RMA** – Open an RMA Request Form in add mode.
-  **Open Database** – Open a database file.
-  **Calendar** – Open a Calendar Form.
-  **Track RMA by Item** – Open the Track RMA by Item Form. This Form allows you to search RMA using the information about faulty items such as serial number, failure description, etc.
-  **Overdue RMA** – Open a Form that displays a currently overdue RMA.
-  **Under-stock Parts** – Open a Form that displays a spare part that is currently below its minimal stock level.
-  **Web Browser** – Open a web browser
-  **Online Help Content** – Access InFOREMAX online help content.

Introducing InFOREMAX DataGrid

InFOREMAX utilizes a DataGrid control to present a tabular view of information. There are several extensibility features built right into DataGrid that make working in the DataGrid productive and convenient. In this section you'll find information that will help you to better understand the key features and functions of the DataGrid control (See figure 4).

Outlook GroupBy

Group rows with similar values together, similar to the way rows are displayed in Microsoft® Outlook.

User Actions Toolbar

Contain a row of buttons for performing common actions on the DataGrid.

Quick Finder

A list of predefined filters that assist the end user with RMA search.

The screenshot shows a web-based application window titled 'RMA'. At the top, there is a 'User Action' toolbar with several icons. Below it is a 'Quick Find' search box. The main area is a DataGrid table with columns: RMA Number, Description, Customer, Created by, Priorit, Status, % Complet, Assign To, and Due Date. A red box highlights the 'Click here to filter data...' link in the first row. Another red box highlights the 'Drag a column header here to group by that column.' text above the table. A third red box highlights the 'Quick Find' search box. A fourth red box highlights the 'Field Chooser' panel on the right, which lists various filters like '% Completed', 'Alt. Number', 'Assign To', etc. with checkboxes. A fifth red box highlights the 'User Action' toolbar. A sixth red box highlights the 'Outlook GroupBy' feature, showing a small arrow icon next to the first row's RMA Number.

RMA Number	Description	Customer	Created by	Priorit	Status	% Complet	Assign To	Due Date
<input checked="" type="checkbox"/>	Click here to filter data...					=		=
RMA20090618-1	RMA CCRDR refurb 114 ADX	Bay Harbor Electronic	Andre Fry	Norm	Closed	100 %	Margaret Pea	04/07/2009
RMA20090619-6	1 more HD MAX unit returned from t	Grand Cypress	Andre Fry	Low	Closed	100 %	Nancy Davoli	04/07/2009
RMA20090619-5	15 HD MAX RMA units	Vistoso Co	Andre Fry	Critic	Closed	100 %	Robert King	04/24/2009
RMA20090619-10	RMA 6 HD units	Greystone	Andre Fry	Critic	Closed	100 %	Janet Leverli	04/30/2009
RMA20090619-2	RMA 56 Min Computer CCRDR refu	Bell Nob, Inc.	Andre Fry	Norm	Closed	100 %	Janet Leverli	05/12/2009
RMA20090619-9	5 HD RMA UNITS	Greystone	Andre Fry	Norm	Closed	100 %	Michael Suya	05/13/2009
RMA20090619-3	10 SLZ RMA units	Eagles Pride Corporation	Andre Fry	Norm	Closed	100 %	Steven Buch	05/19/2009
RMA20090619-4	RMA 1 HD MAX unit	Vistoso Co	Andre Fry	High	Closed	100 %	Robert King	05/19/2009
RMA20090619-12	RMA 3 HD units	Legend Oaks	Andre Fry	Norm	Closed	100 %	Andrew Fulle	06/02/2009
RMA20090619-14	RMA 6 HD SLAZ units	Maryland National	Andre Fry	Norm	Closed	100 %	Nancy Davoli	06/10/2009
RMA20090619-7	6 HD MAX RMA units + 5 units rx'd f	Grand Cypress	Andre Fry	Norm	Closed	100 %	Anne Dodsw	06/19/2009
RMA20090619-8	RMA 10 HD MAX units	Grand Cypress	Andre Fry	Norm	Closed	100 %	Nancy Davoli	06/19/2009
RMA20090619-11	5 HD units refurb request...has PO.	Hawks Landing	Andre Fry	Low	On-Hold	25 %	Janet Leverli	06/19/2009
RMA20090619-13	RMA 6 HD units SLAZ	Wild Fire	Andre Fry	Norm	Closed	100 %	Janet Leverli	06/19/2009
RMA20090619-15	120 HDX RMA for CCRDR refurb	Remington Parkview	Andre Fry	Norm	Open	0 %	Nancy Davoli	06/19/2009
RMA20090619-19	RMA 6 HD units SLAZ	Wolf Run	Andre Fry	Norm	Submitt	0 %	Nancy Davoli	06/25/2009
RMA20090619-16	RMA 3 HDX units	Tiburou Ventures Limited	Andre Fry	Low	In-Progr	50 %	Janet Leverli	06/29/2009
RMA20090619-18	RMA 4 HD units	Tustin Ranch	Andre Fry	High	In-Progr	50 %	Margaret Pea	06/29/2009
RMA20090619-21	ADV exch RMA 5 HD units	Silverstone	Andre Fry	High	In-Progr	25 %	Michael Suya	06/30/2009
RMA20090619-20	ADV exch 4 HD units	Camelback	Andre Fry	High	In-Progr	25 %	Robert King	07/02/2009
RMA20090619-17	RMA 62 HDX CCRDR refurb	Trillium Wood	Andre Fry	Critic	Submitt	0 %	Janet Leverli	07/09/2009

Figure 4

Sorting

Click any column header to sort data in that column. Columns can be sorted on their own or with other columns.

Filtering

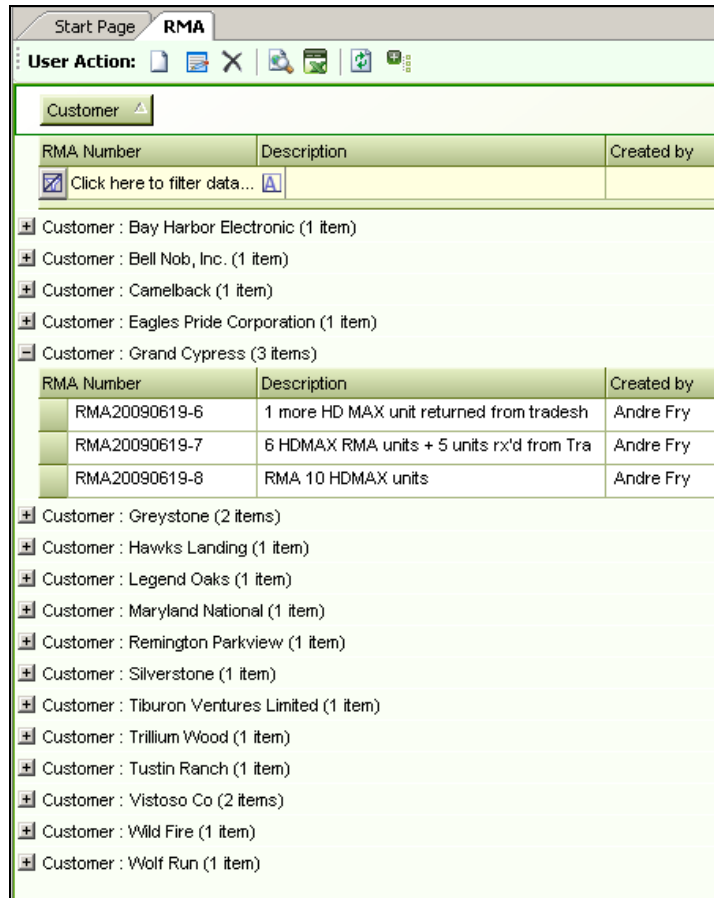
Filter data as required by the end user.

Field Chooser

Quickly hide or show columns right from the field chooser.

About Outlook GroupBy

The Outlook GroupBy allows you to create custom groupings of data. You can drag and drop column headers into the GroupBy Area. DataGrid will automatically create a distinct list of values for the selected column. Each distinct value becomes a parent row. The rows that are associated with each distinct value are then indented and displayed as child rows (See figure 5).



The screenshot shows an Outlook window titled "RMA" with a "User Action" toolbar. A "Customer" dropdown menu is active, showing a list of customers. The data grid below is grouped by customer. The "Grand Cypress" group is expanded, showing three rows of RMA data. The columns are "RMA Number", "Description", and "Created by".

RMA Number	Description	Created by
Customer : Bay Harbor Electronic (1 item)		
Customer : Bell Nob, Inc. (1 item)		
Customer : Camelback (1 item)		
Customer : Eagles Pride Corporation (1 item)		
Customer : Grand Cypress (3 items)		
RMA20090619-6	1 more HD MAX unit returned from tradesh	Andre Fry
RMA20090619-7	6 HDMAX RMA units + 5 units rx'd from Tra	Andre Fry
RMA20090619-8	RMA 10 HDMAX units	Andre Fry
Customer : Greystone (2 items)		
Customer : Hawks Landing (1 item)		
Customer : Legend Oaks (1 item)		
Customer : Maryland National (1 item)		
Customer : Remington Parkview (1 item)		
Customer : Silverstone (1 item)		
Customer : Tiburon Ventures Limited (1 item)		
Customer : Trillium Wood (1 item)		
Customer : Tustin Ranch (1 item)		
Customer : Vistoso Co (2 items)		
Customer : Wild Fire (1 item)		
Customer : Wolf Run (1 item)		

Figure 5

About User Action toolbar

The User Action toolbar contains a row of command buttons that allows you to perform certain actions on the DataGrid (See figure 6).

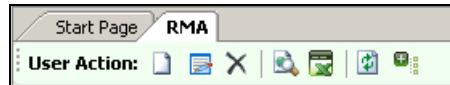









Figure 6

There are several types of command buttons in the User Action toolbar:

-  **New Record** – Open a Form in add mode.
-  **Edit Record** – Open a Form in edit mode and populate it with the selected row in your DataGrid.
-  **Delete Record** – Delete the selected DataGrid row.
-  **Print DataGrid** – Print out your entire DataGrid.
-  **Export DataGrid** – Export your data directly to Microsoft® Excel®.
-  **Default Layout** – Reset the DataGrid layout to default.
-  **Column Chooser** – Hide or show the Column Chooser.



You can also use mouse right-click in DataGrid to bring up a context menu that contains a list of these commands.

Introducing InFOREMAX Calendar

InFOREMAX uses a Calendar display to present a work schedule of RMA. Use the calendar function to schedule repair work for your employees. (See figure 7).

Change the current calendar month by clicking the month scroll buttons. The bold text in the Calendar date indicates that a repair order exists for that date.

Select Week View or Month View to determine the level of detail displayed in the main Calendar window.

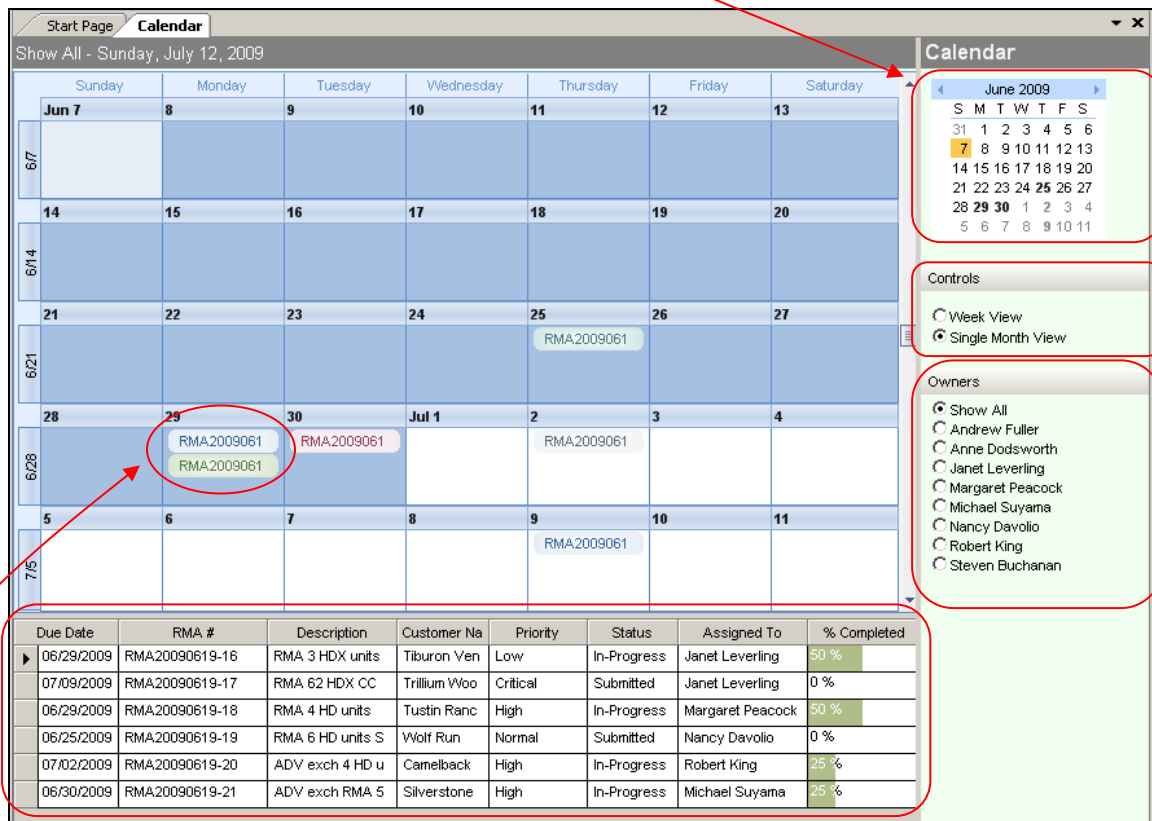


Figure 7

The colored buttons display colors associated with different employees. Simply click the color button to open an RMA form.

A tabular view of RMA data is provided for convenience. Open an RMA Form simply by *double clicking* a row.

Schedules for individual employees can be displayed by selecting the radio button beside their name.

Preparing InFOREMAX

Before using InFOREMAX for the first time, you are required to add your company and user information and set certain parameters through the Preferences and Options.

Company Information

To modify the company information area, select the “Company Information” option in the “Tools” menu (See figure 8).

The screenshot shows a 'Company Information' dialog box with the following data:

Field	Value
Company Name *	Electronix Ltd.
Tax ID/VAT No.	
Address	304 Pannini Street
City	Henderson
State/Province	NV
Zip/Postal Code	89022
Country	USA
Phone Number	702-382-3920
Fax Number	702-382-3813

The 'Shipping Address' section contains identical information to the 'Corporate Information' section. A '<< Copy' button is located to the right of the shipping address field. The dialog also features 'Save', 'Cancel', and 'Help' buttons on the right side.

Figure 8

Enter your company information and then click the “Save” button. This information will be used when generating reports.

Maintaining Users

To maintain users, select the “Show All Users” option in the “Tools” menu (See figure 9).

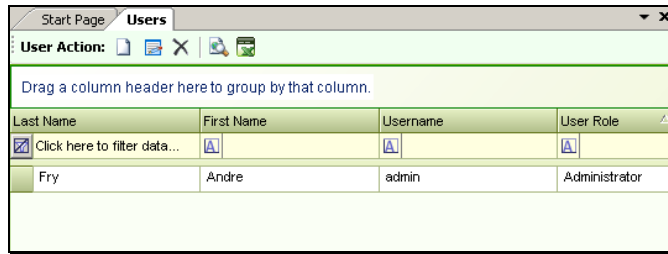


Figure 9

Delete a user – To delete a user, click on the user’s row and click the “Delete” button on the “User Action toolbar” or press the “Delete” key on your keyboard.



You cannot delete the account of the currently logged-in user.

Edit a user – You may change a value for an existing user in the “User Detail Form” (See figure 10). To open the “User Detail Form” for a particular user, select the desired row and click the “Edit” button on the “User Action toolbar” or simply *double click* the row.

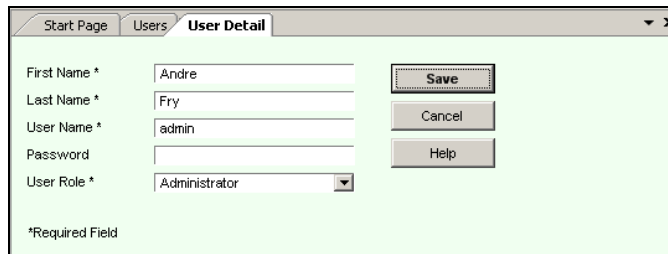


Figure 10

Click “Save” to save your changes or “Cancel” close the form without making any changes.

Add a user – To add a user, click the “New” button on the “User Action toolbar” to bring up a New User Form.

You may also open a New User Form by selecting File → New → Add User...



Passwords are case-sensitive and must be upper or lower case letters or numbers and between 4-10 characters long.

Managing User Privileges and Roles

To maintain user privileges and roles, select the “User Privileges” option in the “Tools” menu (See figure 11).

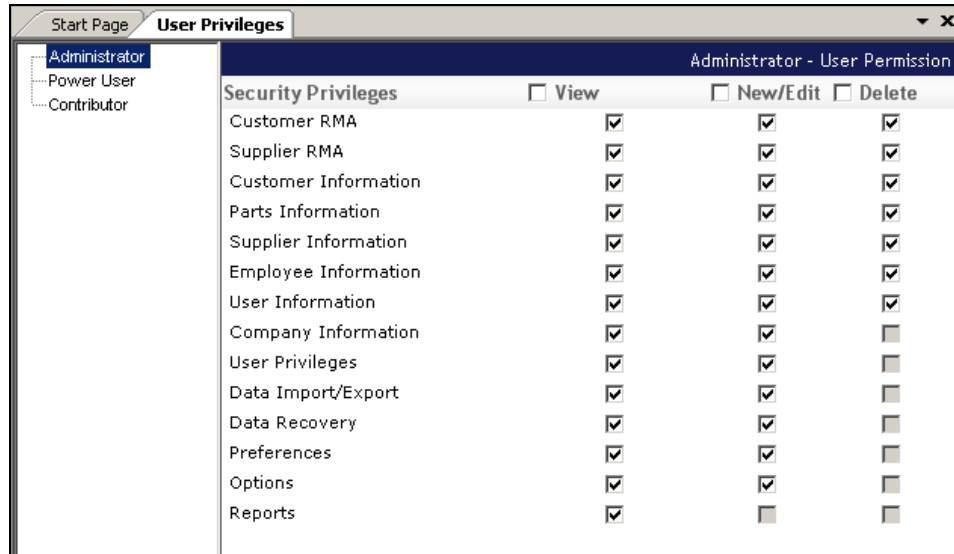


Figure 11

By default the following three roles exist in the InFOREMAX database.

<u>Role</u>	<u>Security Privileges</u>
Administrator	Full Permission
Power User	Read and Write Permission (excluding <i>maintain users, view reports and change system setting.</i>)
Contributor	Read and Write Permission on RMA data only. (cannot modify customer, parts, supplier employee information)

Add a Role – To add a new role, right click any element in the “tree view” (left pane) to bring up a context menu and then select “New Role...”.

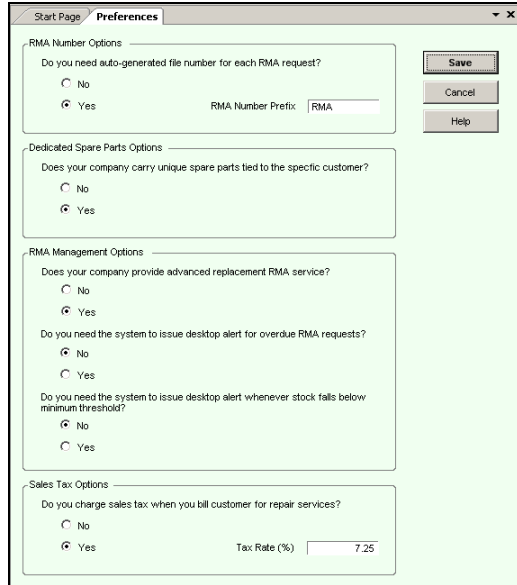
Rename/Delete a Role – To rename or delete a role, select the role by clicking on it and then right click to bring up a context menu. Choose “Rename” from the context menu to change the name of the role or “Delete” to remove the role.



You cannot not delete a role if it has already been assigned to a user. In addition, you cannot delete or rename the "ADMINISTRATOR" role or change administrator privileges.

Preferences

The Preferences section allows you to set master preference. To modify preferences, select the “Preferences...” option in the “Tools” menu (See figure 12).



The screenshot shows a 'Preferences' dialog box with the following sections:

- RMA Number Options:** A question 'Do you need auto-generated file number for each RMA request?' with radio buttons for 'No' and 'Yes' (selected). A text field for 'RMA Number Prefix' contains 'RMA'. Buttons for 'Save', 'Cancel', and 'Help' are on the right.
- Dedicated Spare Parts Options:** A question 'Does your company carry unique spare parts tied to the specific customer?' with radio buttons for 'No' and 'Yes' (selected).
- RMA Management Options:** Three questions:
 - 'Does your company provide advanced replacement RMA service?' with radio buttons for 'No' and 'Yes' (selected).
 - 'Do you need the system to issue desktop alert for overdue RMA requests?' with radio buttons for 'No' (selected) and 'Yes'.
 - 'Do you need the system to issue desktop alert whenever stock falls below minimum threshold?' with radio buttons for 'No' (selected) and 'Yes'.
- Sales Tax Options:** A question 'Do you charge sales tax when you bill customer for repair services?' with radio buttons for 'No' and 'Yes' (selected). A text field for 'Tax Rate (%)' contains '7.25'.

Figure 12

These are several sections under the Preferences:

Auto-Generated RMA Number – Enable/disable auto-generated RMA number. You also have the option to add a prefix name followed by an auto-generated number.

When this option is enabled, the application will automatically assign an RMA number in the following format:

[RMA Prefix] + [YYYYDDMM of the Current Date] + [Auto Number]

Customer-tied Spare Parts – Enable/disable customer-specific spare parts. When this option is enabled there are several things that happen in the application:

1. On the Parts Detail Form, you may assign a specific part to a specific customer or to a group of customers.
2. On the Data Import Form, you may import Parts–Customer data into the database.
3. On the Data Export Form, you may export Parts–Customer data to an Excel spreadsheet.
4. On the Customer RMA Form, you may select customer-specific spare parts.

Advanced Replacement RMA – Enable/disable the advanced replacement RMA feature. When this option is enabled the “Add Advanced Replacement Item..” button will appear on the “User Action toolbar” in the RMA Request Form (See figure 13).



Figure 13

Desktop Alert for overdue RMA – Enable/disable desktop alert for overdue RMA. When this option is enabled the application will issue a desktop alert whenever an RMA is overdue. Alerts generally appear when a user first logs on to the system.

Desktop Alert for under-stock Spare Parts – Enable/disable desktop alert for under-stock spare parts. When this option is enabled the application will issue a desktop alert whenever a spare part falls below a minimum stock level. Alerts generally appear when a user first logs on to the system.

Sales Tax Options – Enable/disable the Use Automatic Tax Calculation option in invoices. You also have the option to add the tax rate. The sales tax value is used on customer invoices.

Options

The Options section allows you to set configuration options. To modify the Options area, select the “Options...” item in the “Tools” menu (See figure 14).

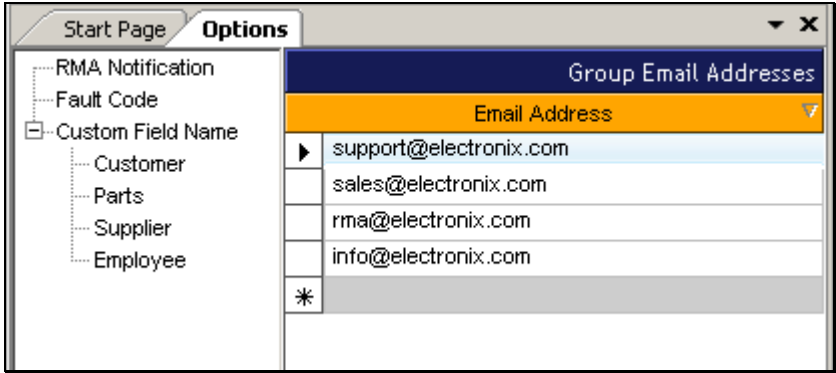


Figure 14

There are several items in Options section which allow you to configure things like RMA Notification, Fault Code, and Custom Field Names. These options are defined below:

RMA Notification – This table includes a list of specific email addresses that will be used for sending notification messages. The “Send Notification” feature can be found on the RMA Request Form.

Fault Code – This lookup table converts the value of a fault code to a more user-friendly description. This helps you determine the reason for a product failure. It is highly recommended that you create a list of potential failure reasons for your products. The fault code is used on the product failure analysis report.



You cannot not delete a fault code that has already been used in repair reports. To stop an obsolete fault code from appearing in the list, make the fault code inactive instead.

Custom Field Name – Custom fields enable you to include extra information for your business information. You may set up new custom fields in Customer, Parts, Supplier and Employee Form. You may create a text, numerical, or date custom field. To enable a custom field you need to make the field visible (See figure 15).

Field	Label Name	Visible
Custom Text (Tab)		<input type="checkbox"/>
Custom Number (Tab)		<input type="checkbox"/>
Custom Date (Tab)		<input type="checkbox"/>
usrdeftext1		<input type="checkbox"/>
usrdeftext2		<input type="checkbox"/>
usrdeftext3		<input type="checkbox"/>
usrdeftext4		<input type="checkbox"/>
usrdeftext5		<input type="checkbox"/>
usrdefnumber1		<input type="checkbox"/>
usrdefnumber2		<input type="checkbox"/>
usrdefnumber3		<input type="checkbox"/>
usrdefnumber4		<input type="checkbox"/>
usrdefnumber5		<input type="checkbox"/>
usrdefdate1		<input type="checkbox"/>
usrdefdate2		<input type="checkbox"/>
usrdefdate3		<input type="checkbox"/>
usrdefdate4		<input type="checkbox"/>
usrdefdate5		<input type="checkbox"/>

Figure 15

Adding Your Business Information

Before start using InFOREMAX you are required to add your business information to the system. This information includes your customers, suppliers, parts and employees information. This data is required when you fill out an RMA Request Form.

Customer Information

To maintain customers, select the “Customers...” option in the “Edit” menu (See figure 16). You may also open a Customer DataGrid by clicking “Edit Customer” button on the Navigation Pane or on the Startup Page.

Customer-tied Spare Parts

When you assign spare parts to specific customers, the spare parts that are associated with each distinct customer are displayed as indented child rows beneath the customer’s entry.

Customer Name	Email	First Name	Last Name	Phone Number	Fax Number
Bay Harbor Electronic	kboyer@boayne.com	Kathy	Boyer	231.439.3035	
Bell Nob, Inc.	dave@ccgov.net	Dave	McCormick	307-686-7069	
Camelback	info@camelbackinn.co	Gary	Normen	480-948-1700	480-951-8469
Eagles Pride Corporatio		Randall	Mr. Rick	(253) 967-6522 ext	(253) 964-2786
Grand Cypress	INQ012604@grandcyp	John	Brown	(407) 239-4700	(407) 239-7219
Greystone		Gary	Schrader	(586) 752-7030	(586) 752-4481

Part Number	Part Name	Cost	Price	Qty
022-0002	Led & Ambient Light Assem	3.98	8.96	47
022-0005	ADX Card Reader, Assembl	44.48	100.08	-194
023-0001	LCD Display, ENHANCED 1	285.00	641.25	7
037-0001	Cable, Flat, Color LCD to M	2.10	4.73	-3
041-0001	Pebble LCD Lens	23.90	53.78	-15
051-0028	Smart GPS Antenna	17.00	38.25	-20
101-0007	Min Computer (10.4"), NA	1028.30	2313.68	15
032-0008	Battery, Litium, 4800mAH,	354.00	796.50	2
022-0011	Power PC Board Assembly,	30.80	69.30	-13
101-0001	Pebble ADU, Sharp, North	1210.00	2320.00	4

Figure 16

You may add/modify your customer information on the Customer Detail Form (See figure 17). To save your changes, you must click the “Save” button.

Click the Email button to launch your default email application (e.g. MS Outlook) with the customer email address as a recipient.

Figure 17

Supplier Information

To maintain suppliers, select the “Suppliers...” option in the “Edit” menu (See figure 18). You may also open a Supplier DataGrid by clicking the “Edit Supplier” button on the Navigation Pane or on the Startup Page.

The spare parts that are associated with each distinct supplier are displayed as indented child rows beneath the supplier’s entry.

Supplier #	Supplier Name	Contact	Phone																									
S005-US	Allied Electronics, Inc.	Alice Sandra	(817) 595-3500																									
S008-US	American Electronic Resource Inc.	Bruce Lee	714-338-4400																									
S009-CN	CEDAR ELECTRONICS LTD.	Eric Chan	(8620) 61275348																									
S006-US	Derf Electronics Corporation	Julius Char	914-235-4600																									
<table border="1"> <thead> <tr> <th>Part Number</th> <th>Part Name</th> <th>Cost</th> <th>Price</th> <th>Qty</th> </tr> </thead> <tbody> <tr> <td>022-0003</td> <td>Speakers Assembly</td> <td>8.45</td> <td>19.01</td> <td>10</td> </tr> <tr> <td>022-0040</td> <td>PCB assembly, 900 MHz radio</td> <td>30.05</td> <td>67.61</td> <td>98</td> </tr> <tr> <td>037-0001</td> <td>Cable, Flat, Color LCD to Main PCA,</td> <td>2.10</td> <td>4.73</td> <td>-3</td> </tr> <tr> <td>041-1002</td> <td>Case, Front, ACM</td> <td>35.75</td> <td>80.44</td> <td>-2</td> </tr> </tbody> </table>				Part Number	Part Name	Cost	Price	Qty	022-0003	Speakers Assembly	8.45	19.01	10	022-0040	PCB assembly, 900 MHz radio	30.05	67.61	98	037-0001	Cable, Flat, Color LCD to Main PCA,	2.10	4.73	-3	041-1002	Case, Front, ACM	35.75	80.44	-2
Part Number	Part Name	Cost	Price	Qty																								
022-0003	Speakers Assembly	8.45	19.01	10																								
022-0040	PCB assembly, 900 MHz radio	30.05	67.61	98																								
037-0001	Cable, Flat, Color LCD to Main PCA,	2.10	4.73	-3																								
041-1002	Case, Front, ACM	35.75	80.44	-2																								
S003-US	Digi-Key Corporation	Steven Brown	218-681-6674																									
S001-UK	Farnell	Larry Yada	+44 870 1200 208																									
S007-US	Marlin P. Jones & Assoc. Inc.	Marlin P. Jones	1-800-652-6733																									
S002-US	Mouser Electronics, Inc.	Linda Salinas	(817) 804-3888 ext 9324																									
S004-US	NTE Electronics, Inc.	Rose Lagman	(973) 748-5089																									

Figure 18

You may add/modify your supplier information in Supplier Detail Form (See figure 19). To save your changes, you must click the “Save” button.

Click the Website button to launch your default web browser (i.e. Internet Explorer) with the supplier’s URL.

Supplier Name * Derr Electronics Corporation Supplier Number S006-US

Contact Information

Address 253 N Grand Ave, Contact Julius Char

City Poughkeepsie Phone number 914-235-4600

State/Province NY Fax Number 800-431-2912

Zip/Postal Code 12603 E-mail sales@derf.com

Country USA Website www.derf.com

Buttons: Save, Cancel, Help

Custom Text, Custom Number, Custom Date

*Required Field

Figure 19

Part Information

To maintain parts, select the “Parts...” option in the “Edit” menu. See figure 20. You may also open a Parts DataGrid by clicking the “Edit Part” button on the Navigation Pane or on the Startup Page.

Part Number, Part Name, Unit Price and Unit Cost information are required for invoices, estimates, and cost analysis reports.

InFOREMAX deducts the spare parts that are consumed in repairs from your inventories, and issues an alert whenever a spare part falls below minimum stock level.

Drag a column header here to group by that column.

Part Number	Part Name	Cost	Sale Price	Qty	Min. Stock
Click here to filter data...					
022-0002	Led & Ambient Light Assembly	\$3.98	\$8.96	47	25
022-0003	Speakers Assembly	\$8.45	\$19.01	10	5
022-0004	PCBA, DF-9 Display Cable Adaptor	\$7.90	\$17.78	4	0
022-0005	ADX Card Reader, Assembled	\$44.48	\$100.08	-194	5
022-0008	PCB Assembly, Shark 2 Board, ACM	\$354.00	\$796.50	98	50
022-0010	Radio Card, 2.4GHz Wireless PCMCIA NIC	\$39.00	\$87.75	28	20
022-0011	Power PC Board Assembly, ADX	\$30.80	\$69.30	-13	0
022-0036	PCB Assembly, Slazenger, ACM	\$249.16	\$560.61	6	0
022-0040	PCB assembly, 900 MHz radio	\$30.05	\$67.61	98	50
023-0001	LCD Display, ENHANCED 10.4"	\$285.00	\$641.25	7	10
032-0008	Battery, Litium, 4800mAH, 12 cells	\$354.00	\$796.50	2	0
037-0001	Cable, Flat, Color LCD to Main PCA, 30 pin	\$2.10	\$4.73	-3	5

Figure 20

You may add/modify your Part information in a Parts Detail Form (See figure 21). To save your changes, you must click the “Save” button.

Allows you to attach a picture of the spare part by clicking the “Upload” button.

Assign a spare part to a specific supplier by adding the supplier to the suppliers list.

Assign a spare part to a specific customer by adding the customer to the customer list.

Link a document or an image by clicking the “Attach” button in the User Action toolbar.

Figure 21

Employee Information

To maintain employees, select the “Employees...” option in the “Edit” menu. See figure 22. You may also open an Employees DataGrid by clicking the “Edit Employee” button on the Navigation Pane or on the Startup Page.

Billing Information
Technicians’ billing rate is required for invoices, estimates, and cost analysis reports. It is recommended that you provide this information.

Photo	First Name	Email	Address	State/Province
	Nancy Davolio	(206) 555-9857 ext	507 - 20th Ave. E. Apt. 2A	WA 98122
	Andrew Fuller	(206) 555-9482 ext	908 W. Capital Way	WA 98401
	Janet Leverling	(206) 555-3412 ext	722 Moss Bay Blvd.	WA 98033

Figure 22

You may add/modify your Employee information in an Employee Detail Form (See figure 23). To save your changes, you must click the “Save” button.

Custom Fields
Allow you to add extra information for your employees.

The screenshot shows a web application window titled "Employee Detail". At the top, there are navigation tabs for "Start Page", "Employees", and "Employee Detail". Below the tabs is a "User Action" bar with icons for "Upload", "Download", "Remove", and "Email". The main form area is divided into several sections. On the left, there is a profile picture of a woman. To the right of the picture are input fields for "First Name *", "Last Name *", "Title", "Rate (\$/hr)", "Phone Number", and "E-mail". The "First Name" field contains "Nancy", "Last Name" contains "Davolio", "Title" contains "Customer Service Representati", "Rate (\$/hr)" contains "\$ 60.00", and "Phone Number" contains "(206) 555-9857 ext 5462". To the right of these fields are three buttons: "Save", "Cancel", and "Help". Below the personal information is an "Address" section with fields for "Address", "City", "State/Province", "Zip/Postal Code", and "Country". The "Address" field contains "507 - 20th Ave. E. Apt. 2A", "City" contains "Seattle", "State/Province" contains "WA", "Zip/Postal Code" contains "98122", and "Country" contains "USA". At the bottom of the form is a section for "Additional Info" with tabs for "Additional Info", "Custom Number", and "Date". The "Additional Info" tab is selected, and it contains three fields: "Reports To" (Dr. Andrew Fuller), "Education" (BA in psychology from Colorado State University in 1970), and "Language". A red box highlights the "Additional Info" section, and a red arrow points from the "Custom Fields" text box to this section. At the bottom left of the form, there is a note: "*Required Field".

Figure 23



You may use the Data Import Utility to import your business data into the application.

Starting an RMA Request

Generally, a new RMA ticket is created when a customer calls about returning a product for repair. During the initial call, you collect all the customer information and then issue an RMA number to your customer with instructions for return of the defective product. The customer will then send in the product with the RMA number. The following paragraph illustrates how InFOREMAX can assist you to start an RMA request in an efficient manner.

Entering customer contact information

To create a new RMA request, click on the “New RMA” button on the Navigation Pane, the Startup Page, or the Main Toolbar.

A New RMA Request Form is displayed.

To begin, add customer contact information by selecting a customer from the “Search By” combo box (See figure 24).

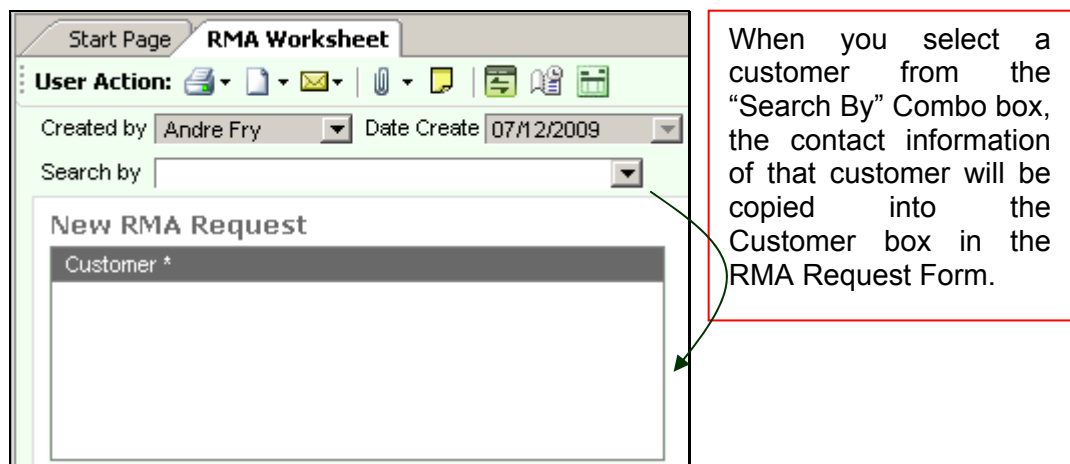


Figure 24

If the customer does not exist in the “Search By” combo box and you need to create a new one, click on the “New” button in the User Action toolbar and select “Add Customer...” (See figure 25).

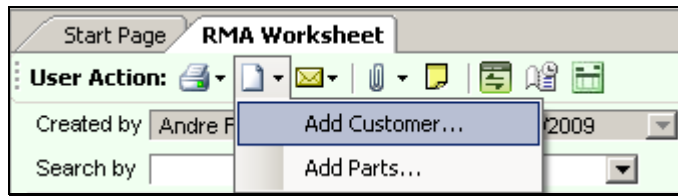


Figure 25

After clicking on the “Add Customer...” button, a New Customer Form is displayed.

After you complete the New Customer Form, the customer information will be added to the database. From that point, you will be able to select that customer from the “Search By” combo box.

Entering RMA request details

After you select a customer, you will need to fill in the details of this request in a New RMA Request Form (See figure 26).

Figure 26

There are several input fields in a New RMA Request Form:

1. **RMA Number** – This field allows user to enter an RMA number. If auto-generated RMA number is enabled, this field will be grey.
2. **Alternative Number** – This field is optional. An Alternative Number may include an original purchase order number.
3. **General Description** – A brief description of an RMA Request.
4. **Priority** – There are four (4) RMA priorities: Critical, High, Normal, and Low. This field allows users to set a priority level for an RMA. The default priority is set to Normal.

5. **Status** – There are six (6) RMA statuses: Open, Issued, In-Progress, On-Hold, Closed and Cancelled.
 - i. Open – The initial status of an RMA request is “Open”. This indicates that an RMA request is created but the details are not complete. An RMA number has not been issued to the customer.
 - ii. Issued – When the details are completed and an RMA number is issued to the customer, the status should be changed to “Issued” and an *expected due date* should be entered in the “Due Date” field. This indicates that a valid repair order exists in the system.
 - iii. In-Progress – When the product has been received and moved to the repair area, the status should be changed from “Issued” to “In-Progress”. At this time, the work should be assigned to a specific employee and an *actual due date* should be entered in the “Due Date” field by a manager.
 - iv. On-Hold – If the repair work needs to be temporarily suspended, the status should be changed to “On-Hold”. You may be waiting for a customer’s response or approval of repair estimates.
 - v. Closed – When the repairs have been completed and the product is shipped back to the customer, the status should be changed from “In-Progress” to “Closed”. Enter the date into the “Date Completed” field and change “Percentage of Complete” to 100%.
 - vi. Cancelled – If the RMA request needs to be cancelled, change the status to “Cancelled”.
6. **Assign To** – A person who is responsible at each step of the return process.
7. **Due Date** – Enter an *expected* or *actual due date* of an RMA request.



An *expected due date* indicates when a product should arrive the repair center. After the product arrives, an *actual due date* may be entered to indicate when the repairs should be completed and the product shipped back to the customer.

8. **% Complete** – This field indicates progress in an RMA request.
9. **Finish Date** – The date that an RMA is completed.

10. **Defective Merchandise**

- i. Part Number and Name – These fields allow users to enter the name of a faulty product and its part number. These fields are combo boxes that contain a list of products.



If customer-tie spare parts option is enabled, the part list will only show customer-specific spare parts

- ii. Quantity, Serial Number and Failure Description - allow users to enter the detailed information about the faulty products.
- iii. Warranty – This check box allows users to indicate whether an item is under warranty.
- iv. Advance Replacement – This check box allows users to indicate whether a replacement product should be sent to a customer in advance.
- v. Received and Date Received – allow users to indicate whether the faulty products have been received.

11. **Notes** – allows user to share messages with others. Click on the “Notes” button on the User Action toolbar (See figure 27). The Date and User Name are appended to the note automatically. The notes field has the ability to act as an activity log.

12. **Attachment** – allows user to link documents or images to an RMA request. For example, pictures of a damaged product or product specification sheets. To attach a file, click the “Attach” button in the User Action toolbar (See figure 27).

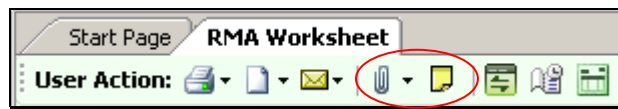


Figure 27

Submitting an RMA Request

After RMA request details have been entered, click the “Save” button to save your changes.



If the auto-generated RMA number option is enabled, the application will automatically assign an RMA number for any new request.

To send a notification email about an RMA request to the members of a group, click “Send Notification” check box at the bottom left of an RMA Request Form (See figure 28).



Figure 28

With “Send Notification” enabled when you click the “Save” button, the application will launch your default email program with a predefined list of email addresses as recipients. The email message will contain information regarding this RMA request.

Printing an RMA Request Worksheet

To print an RMA request worksheet, click the “Print” button in the User Action toolbar and select “Print RMA Worksheet” (See figure 29). Appendix A shows a sample printout of an RMA Worksheet.

Note: Before printing, click the “Save” button to save changes.

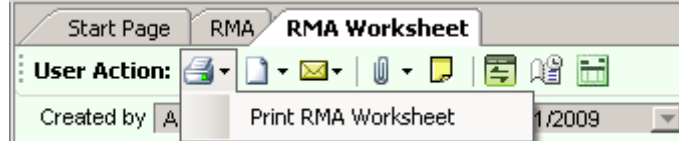


Figure 29

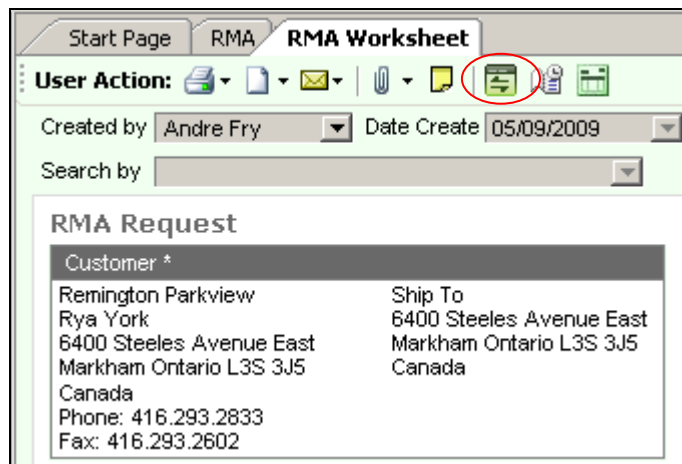
Working on an RMA Request

Your company may offer products covered under a service contract agreement that includes an advanced replacement option. Advance replacement is a service that allows a customer to receive a replacement product prior to your company receiving the faulty item. If, after you have sent the replacement product, you receive the faulty item and determine that the defect is not covered by warranty, a repair cost estimate must be prepared and a Repair Quotation Form must be sent to the customer. Prior approval must be obtained before proceeding with repairs. In this section, you will learn how InFOREMAX can assist you in providing advance replacement service and repair estimates in a timely and cost-effective manner.

Adding Advanced Replacement Items

Open an RMA Request Form where you will add advanced replacement items.

To add an advanced replacement item, click on the “Add Advanced Replacement Item...” button on the User Action toolbar in the RMA Request Form (See figure 30).



The screenshot shows a software interface for an RMA Request. At the top, there are tabs for 'Start Page', 'RMA', and 'RMA Worksheet'. Below the tabs is a 'User Action:' toolbar containing several icons. One icon, representing a document with a plus sign, is circled in red. Below the toolbar, there are fields for 'Created by' (Andre Fry) and 'Date Create' (05/09/2009). A 'Search by' dropdown menu is also visible. The main content area is titled 'RMA Request' and contains a 'Customer *' section with the following details:

Remington Parkview	Ship To
Rya York	6400 Steeles Avenue East
6400 Steeles Avenue East	Markham Ontario L3S 3J5
Markham Ontario L3S 3J5	Canada
Canada	
Phone: 416.293.2833	
Fax: 416.293.2602	

Figure 30



For the “Add Advanced Replacement Item...” button to appear, the advanced replacement option must be enabled.

After clicking on the “Add Advanced Replacement Item...” button, an Advanced Replacement Form is displayed (See figure 31).

To display a child table, double click on a row that contains an expansion indicator.

The defective items are displayed as parent bands.

The replacement items that are associated with each defective item are displayed as child rows to each parent.

The screenshot shows the 'Advanced Replacement RMA' form. It includes a 'Customer' section with contact information for Remington Parkview, an 'RMA Number' field (RMA20090619-15), and a 'General Description' (120 HDX RMA for CCRDR refurb). Below this is a table of 'Advanced Replacement Items' with columns for Part Number, Part Name, Qty, Unit Price, Returned, and Details. A red box highlights the first row of the table, which has an expansion indicator. A second red box highlights the child rows below it.

Part Number	Part Name	Qty	S/N	Failure Description
101-0007	Min Computer (10.4")...	3	112324, 112...	Broken LCD

Advanced Replacement Items					
Part Number	Part Name	Qty	Unit Price	Returned	Details
* Click here to add a new record..					<input checked="" type="checkbox"/>
022-0036	PCB Assembly, Slaze...	1	\$560.61	<input type="checkbox"/>	
022-0036	PCB Assembly, Slaze...	1	\$560.61	<input type="checkbox"/>	
022-0008	PCB Assembly, Shark...	1	\$796.50	<input checked="" type="checkbox"/>	

Summary Totals:

- Parts Total = \$1,917.72
- Returned Total = \$796.50
- Net Total = \$1,121.22

Figure 31

After expanding a parent node, fill in details of the replacement item(s) in the child rows.

There are several input fields in an Advanced Replacement RMA Form:

1. Part Number and Name – allow users to enter the name of a replacement item and its part number. These fields are combo boxes that contain a list of products.
2. Quantity – enter the quantity of the replacement item(s).
3. Returned – This check box allow users to indicate whether the replacement product has been returned.
4. Details – allows users to enter any extra information about the replacement item.

After the replacement item(s) have been entered, click the “Save” button to save changes.

Printing an Advanced Replacement Form

To print out an Advanced Replacement Form, click the “Print” button in the User Action toolbar and select “Print Advanced Replacement Form” (See figure 32). Appendix B shows a sample printout of an RMA Advanced Replacement Form.

Note: Before you print, click the “Save” button to save changes.



Figure 32

Creating a Repair Estimate

To create a repair estimate, click on the “Repair Quotation” button on the Navigation Pane or the “Estimates” button on the Startup Page.

You may also open a Repair Quotation Form by clicking “Create a Repair Quotation...” button on the User Action toolbar in the RMA Request Form (See figure 33).

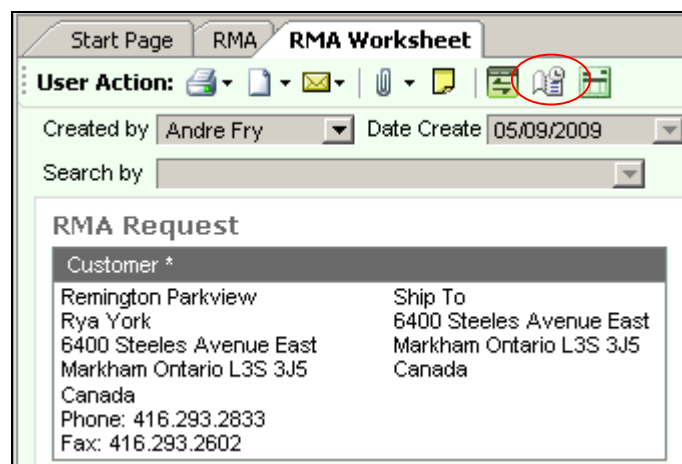


Figure 33

A Repair Quotation Form is displayed (See figure 34).

The screenshot shows a web application window titled "Repair Quotation". The interface includes a navigation bar with "Start Page", "RMA", "RMA Worksheet", and "Repair Quotation". Below the navigation bar is a "User Action" section with icons for print and email. A "Search by" dropdown menu is present. The main form area is divided into several sections:

- Customer *:** Vistoso Co, Mike Russell, 955 West Vistoso Highlands Drive, Tucson Arizona 85737, USA, Phone: (520) 797-9900.
- Ship To:** 955 West Vistoso Highlands Drive, Tucson Arizona 85737, USA.
- RMA Number *:** RMA20090619-4
- Alt. Number:** (empty)
- General Description:** RMA 1 HD MAX unit
- Priority:** High
- Status:** Closed
- Due Date:** 05/19/2009

The main table contains the following data:

Part Number	Part Name	Qty	S/N	Failure Description
101-0001	Pebble ADU, Sharp, N...	1	112701	900mhz fail
* Click here to add a new record..				
051-0011	Antenna, RF, 2.4GHZ,...	1	\$14.49	\$14.49
022-0010	Radio Card, 2.4GHZ W...	1	\$87.75	\$87.75
* Click here to add a new record..				
Davolio Nancy	\$60.00	2.00	\$120.00	Replaced damaged Antenna and radio card

Summary Totals:

- Parts Total = \$102.24
- Labor Total = \$120.00
- Net Total = \$222.24

Figure 34

To start a Repair Quotation Form, select an RMA from the “Search By” combo box.

Entering a Repair Quotation Form

1. From the “Part Name” or “Part Number” combo box, select a part for this repair quotation. “Unit Price” will automatically populate based on the selected part.
2. Enter the “Quantity” of the selected part(s) for this repair quotation.
3. Use additional lines if more parts are required for repairing this unit.
4. Select an employee from the “Employee” combo box. “Billing Rate” will automatically populate based on the selected employee.
5. Enter the “Billable Hours” and “Comments” for this repair quotation.

After completing the Repair Quotation Form, click “Save” to save changes.

Printing a Repair Quotation Form

To print a Repair Quotation Form, click the “Print” button in the User Action toolbar and select “Print Repair Quotation Form” (See figure 35).

Note: Before printing, click the “Save” button to save changes. Appendix C shows a sample printout of a Repair Quotation Form.

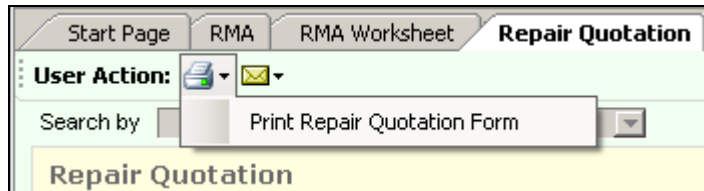


Figure 35

Completing an RMA

After repair charge approval is obtained from a customer, repairs are performed. During the repair, parts and time used are recorded. At a later date, a repair report and/or an invoice may be requested. Following, are instructions on how to perform these tasks easily and efficiently with InFOREMAX.

Entering a Repair Report

To create a repair report, click on the “Repair Report” button on the Navigation Pane or the “Reports” button on the Startup Page.

You may also open a Repair Report Form by clicking “Create a Repair Report...” button on the User Action toolbar in the RMA Request Form (See figure 36).

RMA Request	
Customer *	
Remington Parkview	Ship To
Rya York	6400 Steeles Avenue East
6400 Steeles Avenue East	Markham Ontario L3S 3J5
Markham Ontario L3S 3J5	Canada
Canada	
Phone: 416.293.2833	
Fax: 416.293.2602	

Figure 36

A Repair Report Form is displayed (See figure 37).

To start a Repair Report Form, you first select a RMA from the “Search By” combo box.

Start Page RMA RMA Worksheet **Repair Report**

User Action:

Search by

Repair Report

Customer *		Ship To		RMA Number *	Alt. Number
Vistoso Co Mike Russell 955 West Vistoso Highlands Drive Tucson Arizona 85737 USA Phone: (520) 797-9900		955 West Vistoso Highlands Drive Tucson Arizona 85737 USA		RMA20090619-4	
General Description					
RMA 1 HD MAX unit					
Priority	Status	Due Date			
High	Closed	05/19/2009			

Part Number	Part Name	Qty	S/N	Failure Description		
101-0001	Pebble ADU, Sharp, N...	1	112701	900mhz fail		
* Click here to add a new record...				<input checked="" type="checkbox"/>		
051-0011	Antenna, RF, 2.4GHZ,...	1		<input checked="" type="checkbox"/>	801	1 Replaced broken ante...
022-0040	PCB assembly, 900 M...	1		<input checked="" type="checkbox"/>	302	1 Replaced damaged an...
Employee Name		Billing Rate	Hrs	Non-warranty	Comments	
* Click here to add a new record...				<input checked="" type="checkbox"/>		
Leverling Janet		\$60.00	1.00	<input checked="" type="checkbox"/>	Labor	

Cost for warranty repair	
Parts Total =	\$0.00
Labor Total =	\$0.00
Net Total =	\$0.00
Cost for non-warranty repair	
Parts Total =	\$36.49
Sales for non-warranty repair	
Parts Total =	\$82.10
Labor Total =	\$60.00
Net Total =	\$142.10

Figure 37

Entering a repair report

1. Select a part from the "Part Name" or "Part Number" combo box. The "Unit Price" and "Unit Cost" (Hidden fields) will be automatically populated based on the selected part.
2. Enter the "Quantity" of the selected part required to repair this product.
3. Check the "Non-Warranty" box if applicable.
4. Select a reason for product failure for this repair from the "Fault Code" combo box,
5. Enter the number of items to be repaired in the "Fault Qty" field. (For example, if you need to repair 10 items with the same fault code, the "Fault Qty" would be 10.)
6. Enter the "Repair Description".
7. Start another line if more parts are required for repairing this item.
8. Select an employee to be assigned the repair from the "Employee" combo box. "Billing Rate" will be automatically populate based on the predefined rate for the selected employee.
9. Enter the "Billable Hours" for repairing this product.
10. Enter "Comments" if applicable.

After completing the repair report form, click the “Save” button to save your changes.

Printing a Repair Report

To print out a Repair Report, click the “Print” button on the User Action toolbar and select “Print Repair Report” (See figure 38). Appendix D shows a sample printout of a Repair Report.

Note: Before you print, you must first click the “Save” button to save your changes.

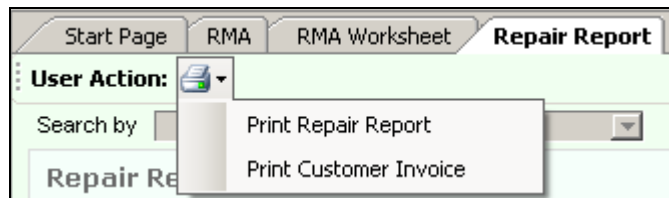


Figure 38

Printing an Invoice

To print an Invoice, click the “Print” button on the User Action toolbar and select “Print Customer Invoice”. Appendix E shows a sample printout of a Customer Invoice.

Note: Before you print, you must first click the “Save” button to save your changes.

Report and Data Analyzing

As a manager, you are often required to create reports that summarize analysis results and show details about your repair center as well as your products.

InFOREMAX can assist you to create comprehensive reports quickly and efficiently with a single click.

Creating Comprehensive Reports

InFOREMAX's Reporting function is fully capable of generating analysis reports to meet any business needs. Three types of analysis are available: Profitability Analysis, Product Failure Analysis and Turnaround Time Analysis.

To view one of the analysis reports, click on the "View Report" button on the Navigation Pane (See figure 39). You may also view an analysis report by clicking the "Analysis Report" submenu button under "Reports" on the main menu.

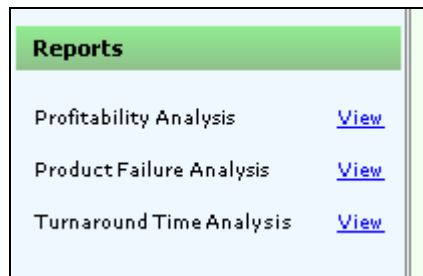


Figure 39

An analysis dialog is displayed (See figure 40). This dialog allows you to choose a particular customer and specify the beginning and end dates for the report.

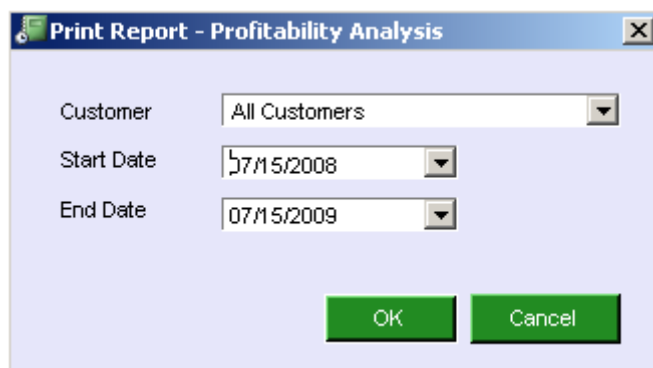


Figure 40

Understanding RMA Reports

Profitability Analysis Report includes a profitability analysis (see figure 41) as well as a parts and labor cost analysis (see figure 42).

<i>Profitability Analysis</i>	
<i>Income Statement</i>	
<i>Sales (Revenues generated from non-warranty service)</i>	\$4,780.98
<i>Cost of goods sold (Parts sold for non-warranty service)</i>	\$1,947.60
<i>Gross Profit</i>	\$2,833.38
<i>Operating expenses (Parts & Labor for warranty service)</i>	\$21,309.34
<i>Operating Income</i>	(\$18,475.97)
<i>Gross Profit Margin</i>	0.6
<i>Operating Profit Margin</i>	-3.9

Figure 41

Profitability Analysis includes a calculation of profitability ratios.

- $\text{Gross Profit} = \text{Sales} - \text{Cost of Goods Sold}$
- $\text{Operating Income} = \text{Gross Profit} - \text{Operating Expense}$

- $\text{Gross Profit Margin} = \text{Gross Profit} / \text{Sales}$
- $\text{Operating Profit Margin} = \text{Operating Income} / \text{Sales}$

Gross Profit Margin – This ratio indicates how efficiently a business is using its materials and labor in the production process. It shows the percentage of net sales remaining after subtracting the cost of goods sold. A high gross profit margin indicates that a business can make a reasonable profit on sales, as long as it keeps overhead costs in control.

Operating Profit Margin – This ratio indicates the operational efficiency of the business giving a good indication of how much a company makes from each dollar of sales.

Parts and Labor Cost Analysis				
<i>Part Number</i>	<i>Part Name</i>	<i>Non-Warranty</i>	<i>Unit Cost</i>	<i>Total Qty</i>
200-700025	Assy, Case, Front, CCM (includes LCD)	<input checked="" type="checkbox"/>	\$595.00	2
040-100101	Cable, Flat, Color LCD to Main PCA	<input type="checkbox"/>	\$2.80	2
060-100021	Fuse, Fast Blow, AG C-1.5A	<input type="checkbox"/>	\$0.08	10
060-100402	Display, Color, LCD, 5", Sharp	<input type="checkbox"/>	\$225.00	1
100-100401	PCB Assembly, Slazenger, CHH	<input type="checkbox"/>	\$210.46	1
101-100101	PCB Assembly, DF-9 Display Cable Adapter, CCM	<input type="checkbox"/>	\$7.99	2
101-100108	Power Adapter Module	<input type="checkbox"/>	\$42.50	89
101-100109	Cable, Cart Battery to Power Adapter w/fuse	<input type="checkbox"/>	\$7.42	1
200-100001	Battery Pack, 4 Cell	<input type="checkbox"/>	\$88.00	1
200-700025	Assy, Case, Front, CCM (includes LCD)	<input type="checkbox"/>	\$595.00	3
Total Cost of Parts for warranty repair			\$6,120.75	
Total Cost of Parts for Non-warranty repair			\$1,190.00	
Total Sale of Parts for Non-warranty repair			\$2,678.00	
<i>Billing Rate</i>		<i>Non-Warranty</i>	<i>Total Billable Hours</i>	
\$60.00		<input checked="" type="checkbox"/>	1.5	
\$60.00		<input type="checkbox"/>	11.5	
Total labor hours for warranty repair			11.5	
Total labor hours for Non-warranty repair			1.5	
Total amount for warranty repair			\$690.00	
Total amount for Non-warranty repair			\$90.00	

Figure 42

Parts and Labor Cost Analysis identifies the total cost of material and labor used for WARRANTY and NON-WARRANTY repairs. The sales of Parts and Labor for non-warranty items are also determined.

Product Failure Analysis Report includes a count of total defective materials (see figure 43) and a product failure analysis (see figure 44).

Total Defective Materials in completed RMA		
Part Number	Product Name	Total Qty
101-100108	Power Adapter Module	199
200-100019	MDU, Color Cart Mount (10.4"), NA	85
101-100109	Cable, Cart Battery to Power Adapter w/fuse	20
200-100030	MDU, Colour Hand Held (5"), NA	11
060-100021	Fuse, Fast Blow, AG C-1.5A	10
200-100000	MDU, B/WHand Held (5"), NA	8
200-100024	Charging Station, Individual Desk Top	5
200-100001	Battery Pack, 4 Cell	3
100-100104	Agere, 128WEP, 801.11b, WLAN CARD - 11 Chan, FCC.	2
200-700016	Antenna, RG w/50ft Outdoor Ethemet Cable	1
200-100014	Battery Eliminator, Cart Mount	1
100-100101	PCB Assembly, Slazenger, BHH	1

Figure 43

Total Defective Materials identifies the total number of materials that have been serviced.

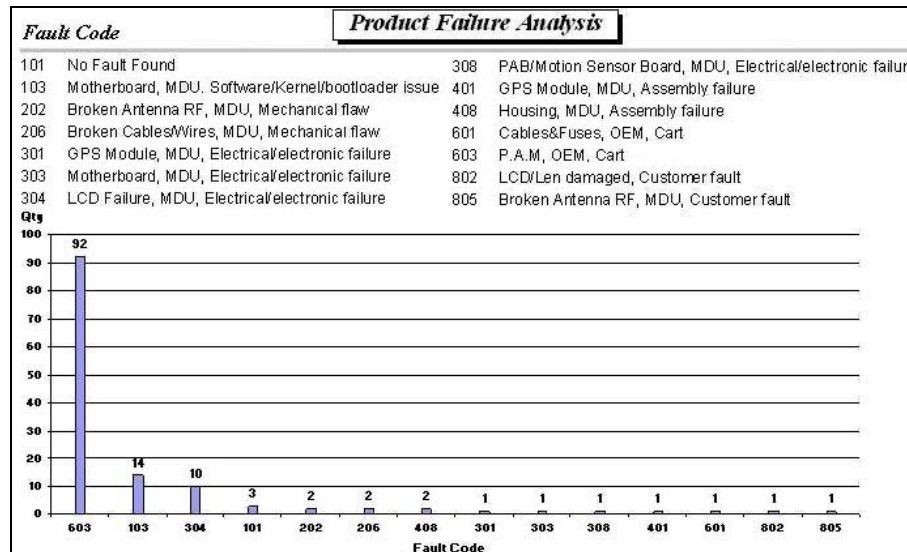


Figure 44

Product Failure Analysis displays the reason for product failure to aid with future diagnostics and product reliability improvements.

RMA Turnaround Time Analysis Report includes average RMA turnaround time analysis (see figure 45) and Completed RMA cases review (see figure 46).

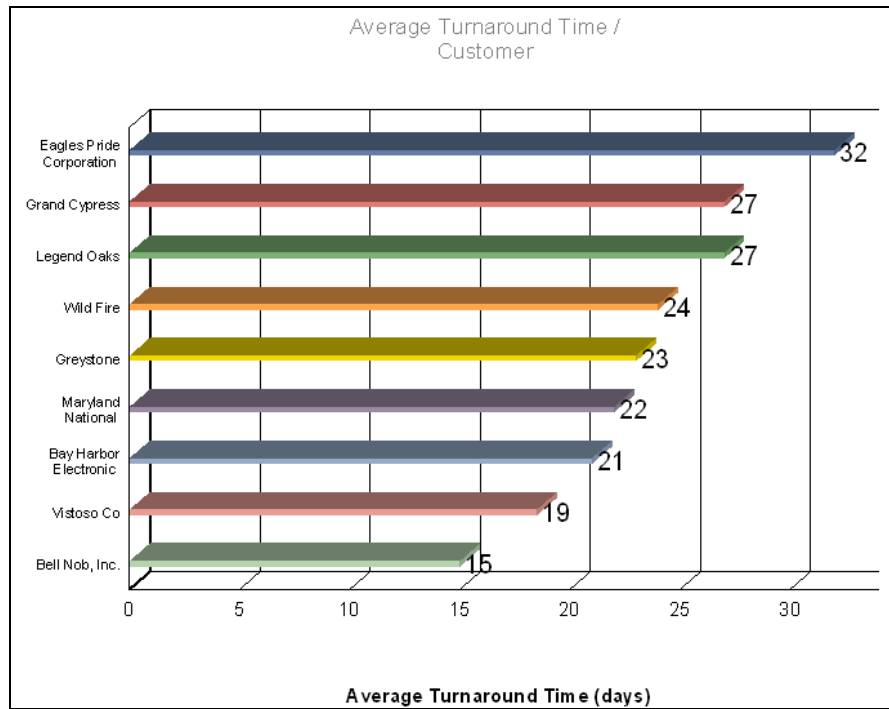


Figure 45

Turnaround Time Analysis identifies performance gaps in your service department. Results include the top 10 customers who have the longest RMA turnaround time.

Completed RMA Cases						
Bay Harbor Electronic						
RMA20090618-1		RMA CCRDR refurb 114 ADX				
Priority : Normal	Date Entered : 3/18/2009	Due Date : 4/7/2009	Date Completed : 4/8/2009			
Code	Defective item	Qty	Serial #	Failure Description	Repair Description	
802	Pebble ADU, Sharp, Norl	3		LED/sensor fail	changed LED assy	
102	Pebble ADU, Sharp, Norl	1		MB fail	changed MB	
405	Pebble ADU, Sharp, Norl	1		Broken LCD	changed LCD	
404	Pebble ADU, Sharp, Norl	144		CC RDR refurb project	Change CCRDR assy	
Turnaround time from RMA creation to completion						21 day(s)
Invoice amount for non-warranty service						\$17,212.77

Figure 46

Completed RMA Cases Review summarizes the RMA cases that occur between the specific start and end date.

Other Features

This section covers other valuable features of the InFOREMAX system.

Data Import/Export Utility

InFOREMAX's Import-Export is a complementary utility that allows you to write data into and out of your InFOREMAX database. This utility can import external spreadsheet data into the database and export database data to spreadsheet files. This can save hours of data entry time!

The Excel templates used for importing data are present in the InFOREMAX...\Excel folder.

There is no specific sequence for importing spreadsheet data into the database but there are several rules you need to follow.

1. The column marked with an asterisk (*) indicates that it is a required field.
2. Names are case-sensitive. InFOREMAX \neq inforemax.
3. When you import "parts_suppliers" or "parts_customers" data, the name of parts, suppliers and customers must be identical to the one in the part, supplier and customer tables. Otherwise, the utility will add a new entry in the corresponding tables if no match is found.

To start Import-Export Utility, select the "Data → Import-Export" submenu under "Tools"

Synchronizing you data with the data in your InFOREMAX database

By selecting the overwrite existing record option, you are able to synchronize your spreadsheet data with the data in your InFOREMAX database given that their names are identical (See figure 47).

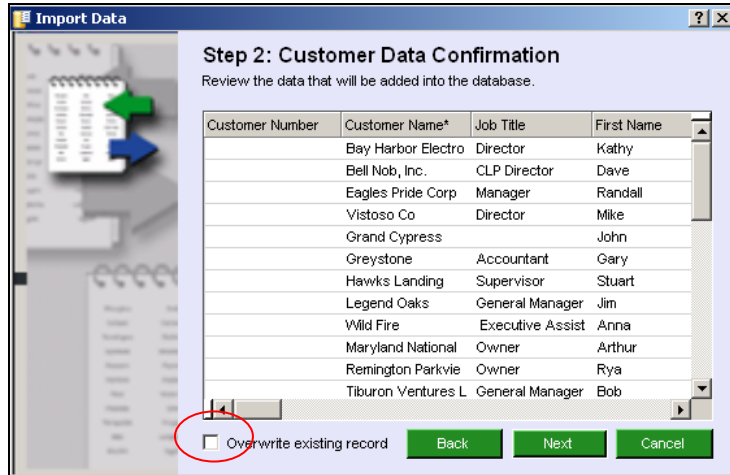


Figure 47

Data Recovery Utility

InFOREMAX's Data Recovery is a complementary utility that allows you to restore data that is deleted by other users. This utility is fully capable of recovering data lost after accidental deletion. It allows you to recover data in the Customer RMA, Customer, Supplier RMA, Supplier, Parts, Employee, and User tables.

To start the Data Recovery Utility, select the "Data → Recovery" submenu under "Tools".

View License Information

This utility provides you with the general information about your software subscription. You can find your SaaS period and its expiration date (See figure 48).

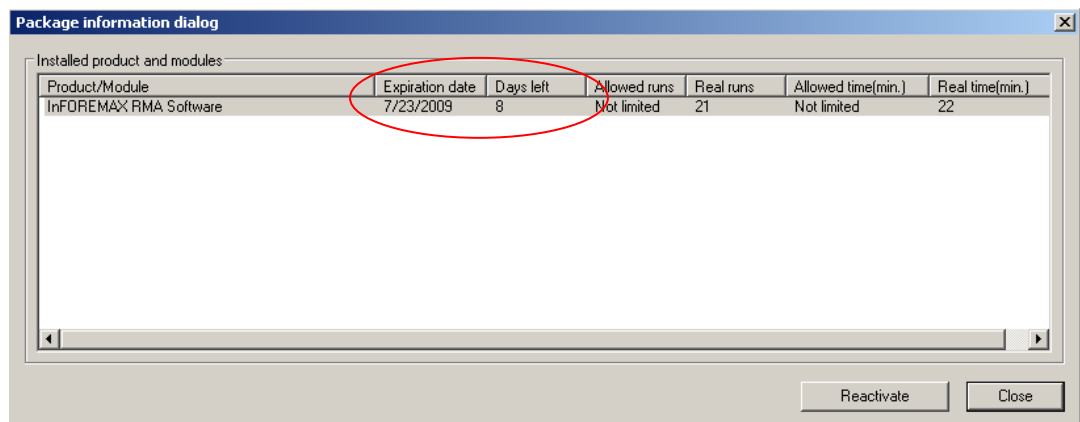


Figure 48

You can switch your subscription plan to premium by reactivating your application with a different serial number

InFOREMAX Online

We back our products with a 30-Day Money-Back Guarantee and free lifetime upgrades. If you find any issues or bugs in the application or have any questions or suggestions, you can send us a message by using our online forms.

If you find any software bug, we will fix it for you and provide a software update to you for free!

Appendices

Appendix A: A Sample Printout of an RMA Worksheet

Electronix Ltd. RMA Worksheet						
RMA Number :		RMA20090619-4				
Description :		RMA 1 HD MAX unit				
Bill To :			Ship To :			
Vstoso Co Mike Russell 955 West Vstoso Highlands Drive Tucson Arizona 85737 USA Phone: (520) 797-9900			Ship To 955 West Vstoso Highlands Drive Tucson Arizona 85737 USA			
Date Entered :		4/19/2009				
Entered By :		Andre Fry				
Priority :		High				
Due Date :		19-May-09				
Notes :						
6/20/2009 [Andre Fry] : Status changed to Closed						
6/19/2009 [Andre Fry] : Priority changed to High						
6/19/2009 [Andre Fry] : Finish date is 05/13/2009						
6/19/2009 [Andre Fry] : Due date is 05/19/2009						
6/19/2009 [Andre Fry] : Completion is changed to 100 %						
6/19/2009 [Andre Fry] : Status changed to In-Progress						
6/19/2009 [Andre Fry] : Assigned to Robert King						
Defective Merchandise :						
Part Number	Part Name	Qty	S/N	Failure Description	Warnty	
101-0001	Pebble ADU, Sharp, North America	1	112701	900mhz fail		<input type="checkbox"/>

Appendix B: A Sample Printout of an RMA Advanced Replacement Form

Electronix Ltd.						
RMA Advanced Replacement Form						
Bill To : Remington Parkview Rya York 6400 Steeles Avenue East Markham Ontario L3S 3J5 Canada Phone: 416.293.2833 Fax: 416.293.2602				Ship To : Ship To 6400 Steeles Avenue East Markham Ontario L3S 3J5 Canada		
Date Entered : 7/15/2009		Entered By : Andre Fry				
RMA Number : RMA20090619-15		Description : 120 HDX RMA for CCRDR refurb				
Replacement Item(s) :						
Part Number	Part Name	Qty	Cost	Price	Retrn'd	Detail
022-0008	PCB Assembly, Shark 2 Board, ACM	1.00	354.00	796.50	<input checked="" type="checkbox"/>	
022-0036	PCB Assembly, Slazenger, ACM	2.00	249.16	560.61	<input type="checkbox"/>	
Parts Total			\$852.32	\$1,917.72		
Returned Total			\$354.00	\$796.50		
Net Total			\$498.32	\$1,121.22		

Appendix C: A Sample Printout of a Repair Quotation Form

Electronix Ltd.				
Repair Quotation and Authorization Form				
Bill To:		Ship To:		
Vstoso Co Mike Russell 955 West Vstoso Highlands Drive Tucson Arizona 85737 USA Phone: (520)797-9900		Ship To 955 West Vstoso Highlands Drive Tucson Arizona 85737 USA		
Date Quoted : 7/15/2009		Quoted By : Andre Fry		
RMA Number : RMA20090619-4		Description : RMA 1 HD MAX unit		
Parts :				
Part Number	Part Name	Qty	Unit Price	Subtotal
022-0010	Radio Card, 2.4GHz Wireless PCMCIA/NIC	1.00	\$87.75	\$87.75
051-0011	Antenna, RF, 2.4GHZ, Portable	1.00	\$14.49	\$14.49
			Grand Total	<u>\$102.24</u>
Labor :				
Time (hrs)	Comments	Rate (\$/hr)	Subtotal	
2.00	Replaced damaged Antenna and radio card	\$ 60.00	\$120.00	
			Grand Total	<u>\$120.00</u>
Estimated Amount		\$ 222.24		
By signing below, I agree to pay for repair service and replacement value for parts.				

Appendix D: A Sample Printout of a Repair Report

Electronix Ltd.						
RMA Repair Report						
RMA Number :		RMA20090619-4				
Description :		RMA 1 HD MAX unit				
Priority :		High				
Bill To :				Ship To :		
Vstoso Co Mike Russell 955 West Vstoso Highlands Drive Tucson Arizona 85737 USA Phone: (520) 797-9900				Ship To 955 West Vstoso Highlands Drive Tucson Arizona 85737 USA		
Date Entered :		4/19/2009		Entered By :		Andre Fry
Due Date :		19-May-09		Date Completed :		13-May-09
Parts :						
Code	Defective Item	S/N	Repair Detail	Part Required	Qty	Non-Warr
801	Pebble ADU, Sharp, North America	112701	Replaced broken antenna	Antenna, RF, 2.4GHZ, Portable	1	<input checked="" type="checkbox"/>
302	Pebble ADU, Sharp, North America	112701	Replaced damaged antenna	PCB assembly, 900 MHz radio	1	<input checked="" type="checkbox"/>
Total cost of parts for warranty repair						\$0.00
Total cost of parts for non-warranty repair						\$36.49
Total sales of parts for non-warranty repair						\$82.10
Labor :						
Technican	Comments	Rate (\$/hr)	Billable Hrs	Non-Warr		
Levering Janet	Labor	\$ 60.00	1.00	<input checked="" type="checkbox"/>		
Total labor hours for warranty repair						\$0.00
Total labor hours for non-warranty repair						\$60.00
Total cost for warranty repair						<u>\$0.00</u>
Total sales for non-warranty repair						<u>\$142.10</u>

Appendix E: A Sample Printout of a Customer Invoice

Electronix Ltd.		Invoice							
<table border="1"> <tr> <td>Bill To:</td> </tr> <tr> <td>Vstoso Co Mike Russell 955 West Vstoso Highlands Drive Tucson Arizona 85737 USA Phone: (520) 797-9900</td> </tr> </table>		Bill To:	Vstoso Co Mike Russell 955 West Vstoso Highlands Drive Tucson Arizona 85737 USA Phone: (520) 797-9900	<table border="1"> <tr> <td>Invoice# :</td> <td>RMA20090619-4</td> </tr> <tr> <td>Date :</td> <td>7/15/2009</td> </tr> </table>		Invoice# :	RMA20090619-4	Date :	7/15/2009
Bill To:									
Vstoso Co Mike Russell 955 West Vstoso Highlands Drive Tucson Arizona 85737 USA Phone: (520) 797-9900									
Invoice# :	RMA20090619-4								
Date :	7/15/2009								
Quantity	Description	Unit Price	Amount						
1.00	P C B assembly, 900 MHz radio	\$87.61	\$87.61						
1.00	Antenna, RF, 2.4GHZ, Portable	\$14.49	\$14.49						
1.00	Labor	\$60.00	\$60.00						
		Subtotal	\$142.10						
		Tax Rate	7.25%						
		Total	\$152.40						
Thank you for your business.									

Appendix F: Spreadsheet Data Specification

Customer Table

Field Name	Date Type	Max Length
Customer Number	Text	30
Customer Name*	Text	100
Job Title	Text	50
First Name	Text	50
Last Name	Text	50
Email	Text	250
Phone Number	Text	30
Fax Number	Text	30
Billing Address	Text	250
Billing City	Text	50
Billing State	Text	50
Billing Zip	Text	20
Billing Country	Text	50
Shipping Address	Text	250
Shipping City	Text	50
Shipping State	Text	50
Shipping Zip	Text	20
Shipping Country	Text	50
usrdefdate1 - 5	Date/Time	MM/DD/YYYY
usrdefnumber1 - 5	decimal(15, 2)	
usrdeftext1 - 5	Text	100

Supplier Table

Field Name	Date Type	Max Length
Supplier Number	Text	30
Supplier Name*	Text	100
Email	Text	250
Website	Text	255
Contact Name	Text	50
Phone Number	Text	30
Fax Number	Text	30
Address	Text	250
City	Text	50
State	Text	50
Zip	Text	20
Country	Text	50
usrdefdate1 - 5	Date/Time	MM/DD/YYYY
usrdefnumber1 - 5	decimal(15, 2)	
usrdeftext1 - 5	Text	100

Parts Table

Field Name	Date Type	Max Length
Part Number	Text	30
Part Name*	Text	50
Description	Text	100
Alt Number	Text	30
UOM	Text	10
Cost	decimal(15, 2)	
Price	decimal(15, 2)	
Qty	Integer	
Minimum Stock	Integer	
usrdefdate1 - 5	Date/Time	MM/DD/YYYY
usrdefnumber1 - 5	decimal(15, 2)	
usrdeftext1 - 5	Text	100

Employee Table

Field Name	Date Type	Max Length
Last Name*	Text	50
First name*	Text	50
Title	Text	50
Email	Text	250
Billing Rate	decimal(15, 2)	
Phone Number	Text	30
Address	Text	250
City	Text	50
State	Text	50
Zip	Text	20
Country	Text	50
usrdefdate1 - 5	Date/Time	MM/DD/YYYY
usrdefnumber1 - 5	decimal(15, 2)	
usrdeftext1 - 5	Text	100