



**Petrotec**

*Dispensing Solutions*

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**User Manual**

# **RMA Portal**



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**THE CONTENTS OF THIS MANUAL MAY BE CHANGED WITHOUT PRIOR NOTES**

# 1. Introduction

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## 1.1 Scope

This manual covers the process of customer repairs/complaints and the use of the online tool RMA Portal (<http://rma.petrotec.eu>).

## 1.2 Company

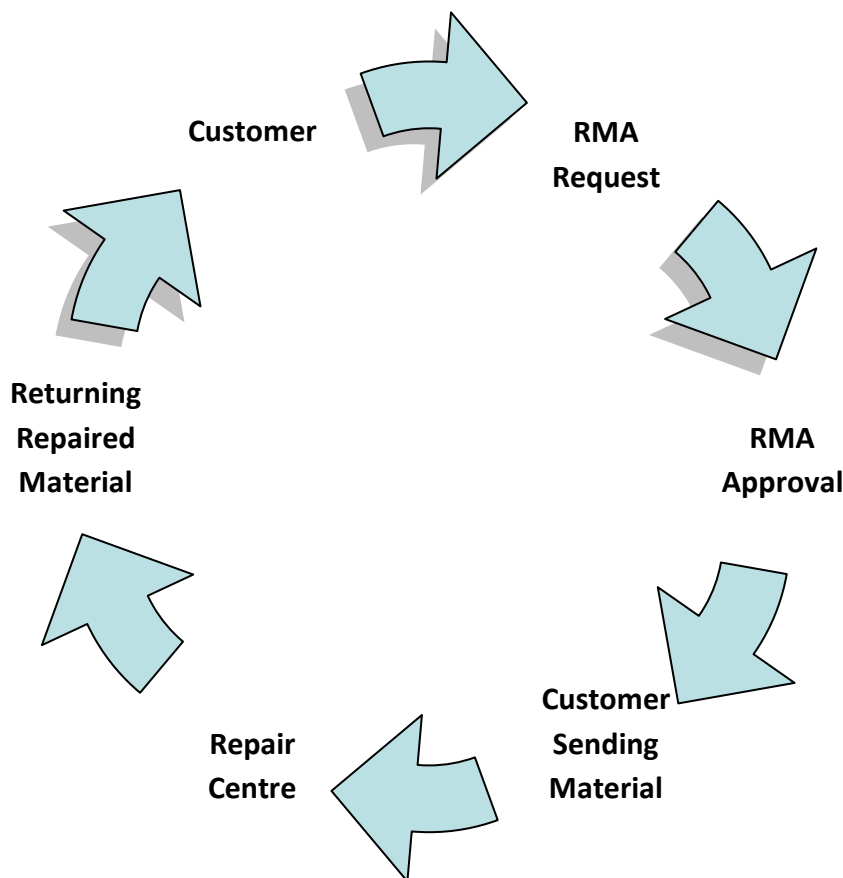
PETROTEC – Inovação e Indústria, S.A.  
Parque Industrial de S. João de Ponte - Pav. C2  
4805-661 Guimarães – Portugal  
Tel.: +351 253 479 300 Fax: +351 253 479 318  
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## 1.3 Overview

The RMA Portal was developed in order to improve and make the whole repair/complaint process more transparent, with significant improvements to the customer. The tool optimizes the customer / company communication and significantly improves the overall management of the repairs/complaints process.

## 1.4 Work Flow

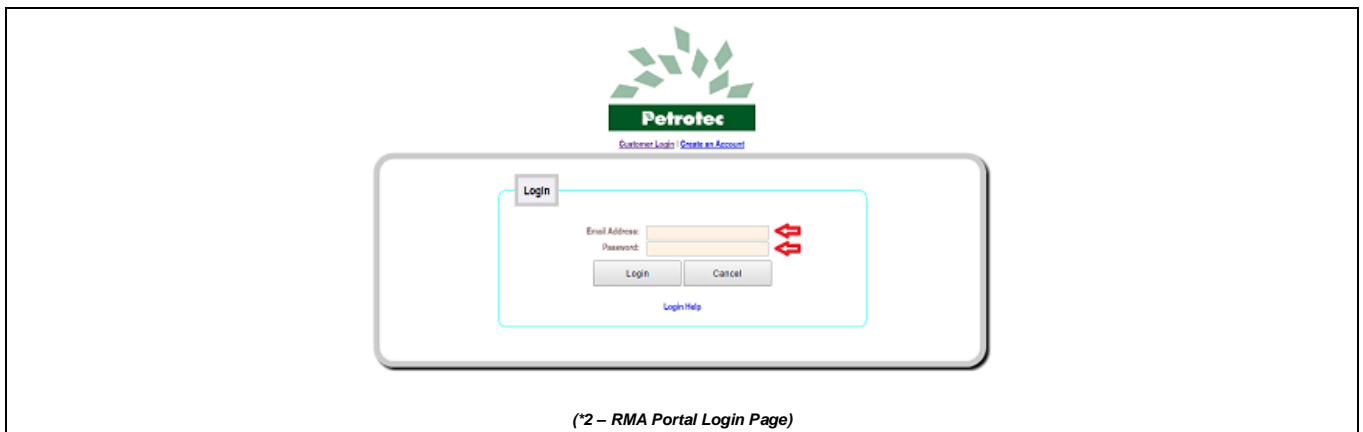
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## 2. RMA Portal

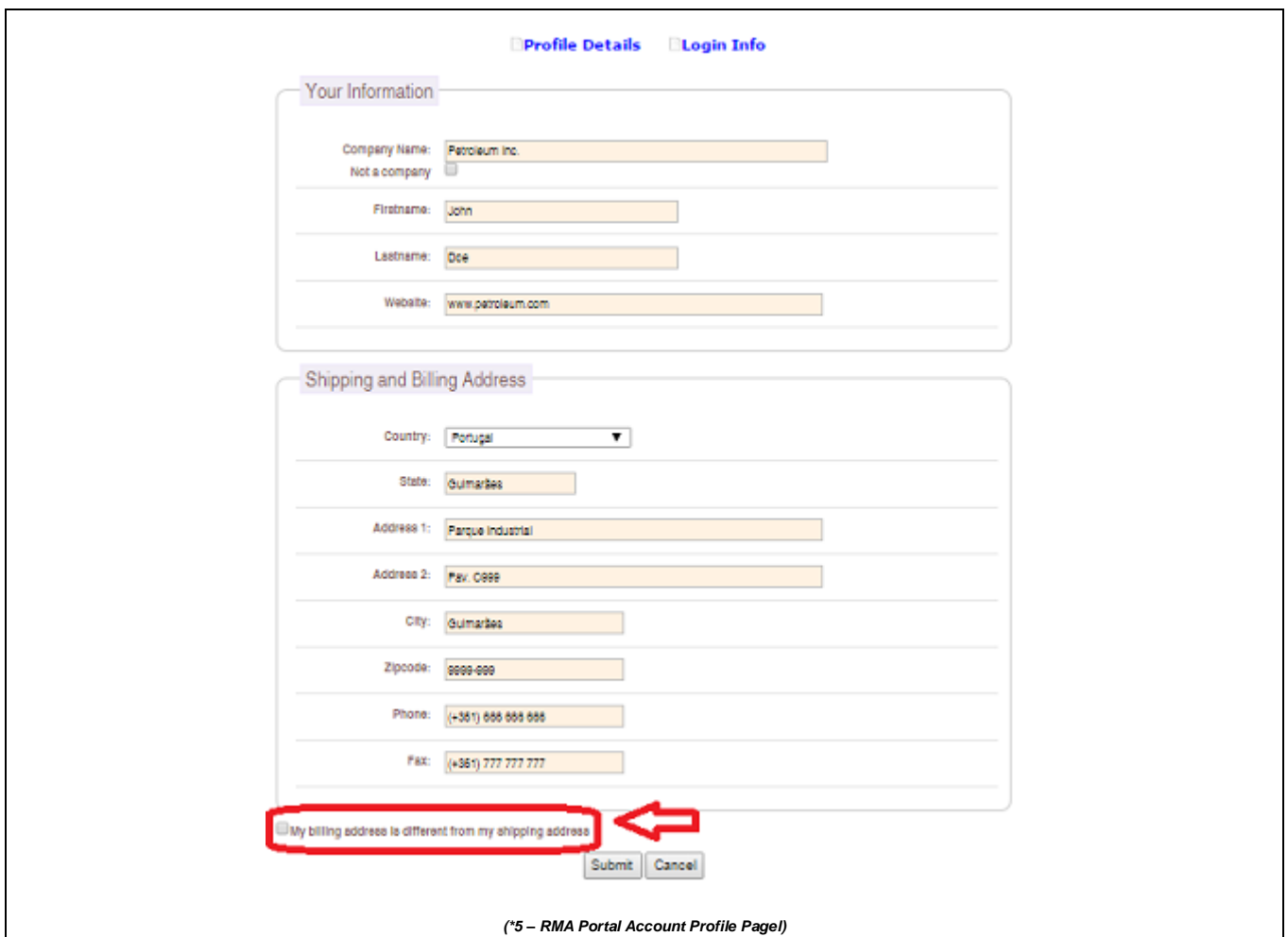
### 2.1 Login

To access the RMA Portal Web Service open a browser and insert the link <http://rma.petrotec.eu> and press on “Customer Login” (\*1). Insert the provided customer login (\*2) and press login button. After successful login you will enter main page (\*3).



## 2.2 Account Profile

To review your account data press on “Review your account profile” on the main page (\*4), you will enter profile detail page (\*5) where all your company information is displayed and can be reviewed if necessary. If your billing address is different from your shipment address please add this info by checking the box on the bottom of account profile page (\*5), a new field will appear (\*6) and you can input the new address information.



My billing address is different from my shipping address

**Billing Address:**

Country: Portugal

State: Guimarães

Address 1: Parque Industrial

Address 2: Pav. C999

City: Guimarães

Zipcode: 8699-698

Phone: (+351) 866 696 666

Fax: (+351) 777 777 777

Submit Cancel

(\*6 – RMA Portal Billing Address Page)

## 2.2.1 Change Login Information (User/Password)

To change your login information (User/Password) go to the account profile page and press “Login Info” on the top of the page (\*7) a new screen will appear (\*8), insert the new information and press “Submit”.

Profile Details  Login Info

**Your Information**

Company Name: Petroleum Inc.  
Not a company

Firstname: John

Lastname: Ode

Website: www.petroleum.com

**Shipping and Billing Address**

Country: Portugal

State: Guimarães

Address 1: Parque Industrial

Address 2: Pav. C999

City: Guimarães

Zipcode: 8699-698

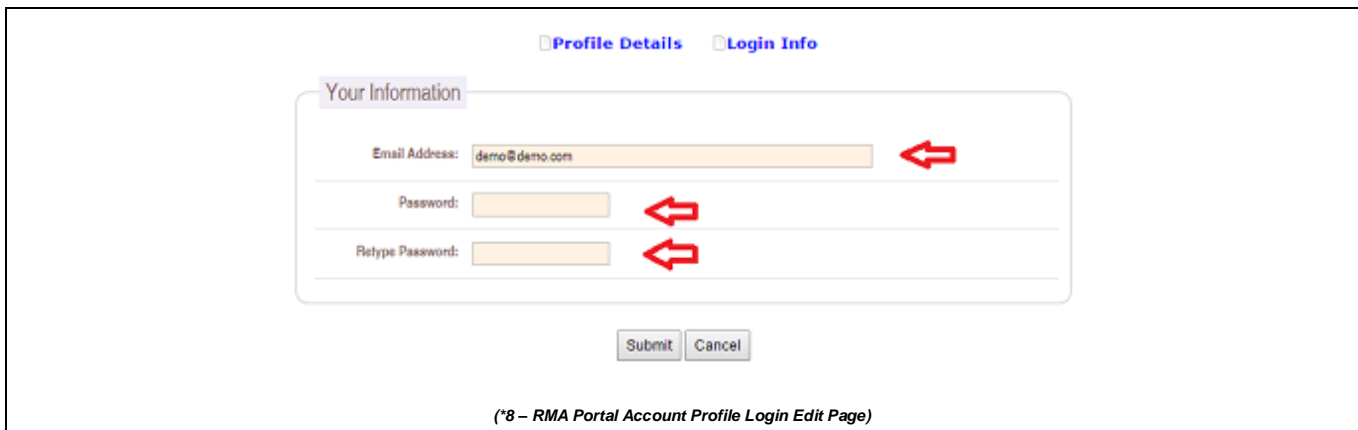
Phone: (+351) 866 696 666

Fax: (+351) 777 777 777

My billing address is different from my shipping address

Submit Cancel

(\*7 – RMA Portal Account Profile Page)



\*8 - RMA Portal Account Profile Login Edit Page

## 2.3 RMA Request

To submit a RMA Request, login in to the RMA Portal (<http://rma.petrotec.eu>) and select “Submit new RMA Request” (\*9). To introduce an item it’s possible to do it through two ways: serial number or Product Code. If the product code is not known it is possible to obtain this information by searching in the product list (Code or Description) that is available in this page (\*10).

Select the item and press “continue” on the bottom of the “Confirm Product Info” page (\*11). In the next page (\*12) you are required to fill in the additional information below about the selected item.

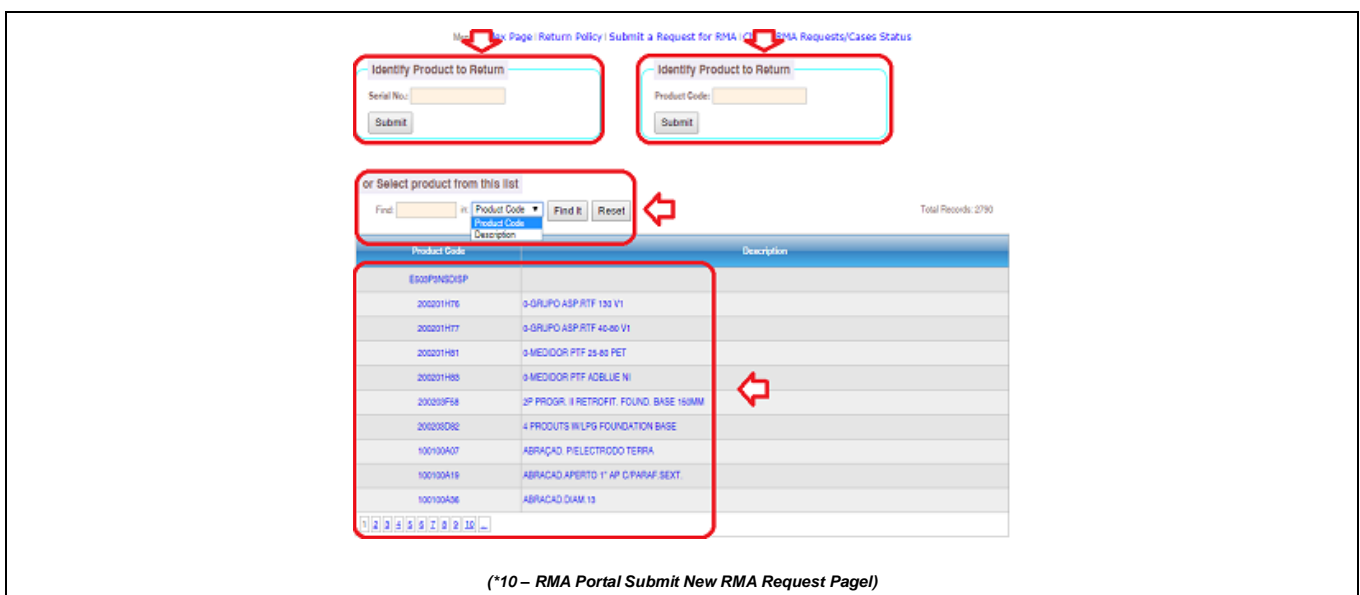
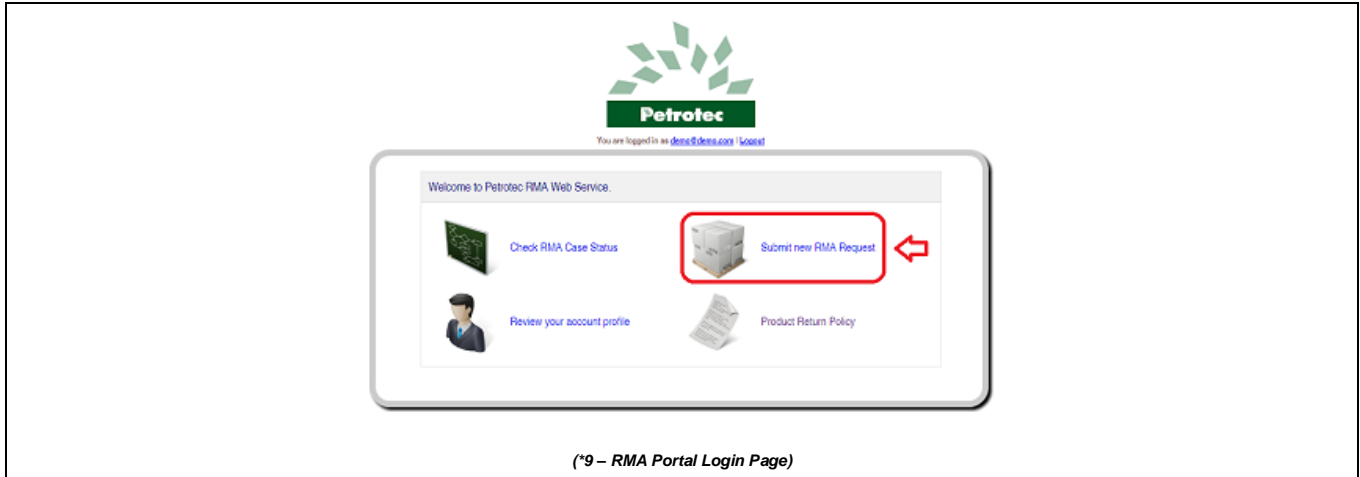
### Item Details:

- ◆ Serial Number - Whenever an item has a serial number filling this field is mandatory; (\*13)
- ◆ Sales Document Number - whenever possible identify the number of the sales document; (\*13)
- ◆ Dispenser Serial Number – If the claimed item is part of an equipment (eg. Dispenser) it is necessary to identify the serial number of the original equipment; (\*13)
- ◆ Reason for Returning: (\*14)
  - “1. Defective”;
  - “2. Damaged On Shipping”;
  - “3. Dead on Arrival” (Mandatory - Requested Action: “1. Repair Under Warranty”);
  - “4. Incorrect Item” (Mandatory - Requested Action: “1. Repair Under Warranty”);
  - “5. Incorrect Quantity” (Mandatory - Requested Action: “1. Repair Under Warranty”);
  - “6. Missing Parts” (Mandatory - Requested Action: “1. Repair Under Warranty”);
  - “7. Other (Specify on Request Action)”;
- ◆ Detailed Problem Description – It is mandatory a detailed description of the problem; (\*15)
- ◆ Requested Action: (\*16)
  - “1. Repair Under Warranty”;
  - “2. Repair Out of Warranty”;
  - “3. Return Material”;
  - “4. Equipment Upgrade” (Use this option if you need to send us an equipment to be upgraded (Hardware/Software) out of warranty conditions);
- ◆ Include Attachment – To add attachments let the box checked and uncheck the box if you don’t have any attachments to upload; (\*17)

After filing in the above requested information press “submit” at the bottom of the page. If the option “include attachment” is activated it will open the page “Include Attachment for Product Below” (\*18), in this page click on “select file” and choose the file you want to upload, after selecting the file insert a small description and finish by clicking on the “upload” button. If you need to upload more files repeat the process, If not finish by pressing the button “done with upload”. (\*19)

In the next page (\*20) you can verify the added items to the RMA if it is necessary to add more items press *“Add another product to return”* and repeat the process, if not press *“I am done adding products”*.

Next step confirm your address, in this page (\*21) you can review the added products before submitting the RMA Request, if everything is ok press *“Submit RMA Request”*, you should now view a message confirming the successful insertion of the RMA Request (\*22), also you should be notified through the provided email address.





**Enter Other Information**

Product Code: 200201H76  
 Description: 0-GRUPO ASP.RTF 130 V1  
 Serial No.:   
 Quantity:   
 Sales Doc. No.:   
 Dispenser Serial Number:   
 Reason For Returning:   
 Detailed Problem Description:   
 Request Action:   
 Include Attachment:  Check this if you have attachment(s) to upload

(\*12 – RMA Portal Product Information Page)

**Enter Other Information**

Product Code: 200201H76  
 Description: 0-GRUPO ASP.RTF 130 V1  
 Serial No.:  ←  
 Quantity:   
 Sales Doc. No.:   
 Dispenser Serial Number:   
 Reason For Returning:   
 Detailed Problem Description:   
 Request Action:   
 Include Attachment:  Check this if you have attachment(s) to upload

(\*13 – RMA Porta Login Page)

**Enter Other Information**

Product Code: 200201H76  
 Description: 0-GRUPO ASP.RTF 130 V1  
 Serial No.:   
 Quantity:   
 Sales Doc. No.:   
 Dispenser Serial Number:   
 Reason For Returning:   
 Detailed Problem Description:  ←  
 Request Action:   
 Include Attachment:  Check this if you have attachment(s) to upload

(\*14 – RMA Porta Login Page)

**Enter Other Information**

Product Code: 200201H76  
 Description: 0-GRUPO ASP.RTF 130 V1  
 Serial No.:   
 Quantity:   
 Sales Doc. No.:   
 Dispenser Serial Number:   
 Reason For Returning:   
 Detailed Problem Description:  ←  
 Request Action:   
 Include Attachment:  Check this if you have attachment(s) to upload

(\*15 – RMA Porta Login Page)

**Enter Other Information**

Product Code: 200201H76  
 Description: 0-GRUPO ASP.RTF 130 V1  
 Serial No.: 129129123  
 Quantity: 1  
 Sales Doc. No.: 66666  
 Dispenser Serial Number: 1486650101  
 Reason For Returning:   
 Detailed Problem Description:   
 Request Action:   
 Include Attachment:   
 Submit Cancel

**Request Action dropdown menu:**

1. Repair Under Warranty
2. Repair Out of Warranty
3. Return Material
4. Equipment Upgrade

(\*16 – RMA Porta Login Page)

**Enter Other Information**

Product Code: 200201H76  
 Description: 0-GRUPO ASP.RTF 130 V1  
 Serial No.: 129129123  
 Quantity: 1  
 Sales Doc. No.: 66666  
 Dispenser Serial Number: 1486650101  
 Reason For Returning:   
 Detailed Problem Description:   
 Request Action:   
 Include Attachment:  Check this if you have attachment(s) to upload  
 Submit Cancel

(\*17 – RMA Porta Login Page)

**Include an attachment for product below**

Product Code: 200201H76  
 Description: 0-GRUPO ASP.RTF 130 V1

Note: Maximum file size allowed for upload is 4MB (4,000KB)

You may upload a PDF or an image:  Nenhum ficheiro selecionado

Description of attachment file:

[Done with upload](#)

(\*18 – RMA Portal Include Attachment Page)

**Include an attachment for product below**

Product Code: 200201H76  
 Description: 0-GRUPO ASP.RTF 130 V1

Attachment	Description of attachment file	Remove
0157720.pdf	Dispenser leak	<input type="button" value="Remove"/>

Note: Maximum file size allowed for upload is 4MB (4,000KB)

You may upload a PDF or an image:  Nenhum ficheiro selecionado

Description of attachment file:

[Done with upload](#)

(\*19 – RMA Porta Login Page)

Menu: [Index Page](#) | [Return Policy](#) | [Submit a Request for RMA](#) | [Check RMA Requests/Cases Status](#)

Product Code	Serial No.	Description	Reason For Returning	Request Action	Quantity	Remove
200201H76	129129123	0-GRUPO ASP.RTF 130 V1	1 Defective	1 Repair Under Warranty	1	<input type="button" value="Remove"/>

(\*20 – RMA Porta Login Page)

Menu: Index Page | Return Policy | Submit a Request for RMA | Check RMA Requests/Cases Status

**Confirm Your Address**

Country:

State:

Address 1:

Address 2:

City:

Zipcode:

Ship to Name:

Attention To:

Phone:

Fax:

(\*21 – RMA Porta Login Page)

Menu: Index Page | Return Policy | Submit a Request for RMA | Check RMA Requests/Cases Status

Your request has been successfully submitted. Do not send your items yet, please wait for an RMA Number. You will be notified through the email address you provided.


Requested On: 29-10-2014

Request ID: 50

(\*22 – RMA Porta Login Page)


## 2.4 RMA Case Status

To check the status of your RMA Cases press “Check RMA Case Status”(\*23) on the main page and a new page with a list of all your RMA Cases (\*24) will open. In this page you can verify that only the approved RMA Cases have a RMA number, the pending RMA Cases are still awaiting approval and no number was yet attributed.




You are logged in as [dennis@dennis.com](#) | [Logout](#)


Welcome to Petrotec RMA Web Service.




[Check RMA Case Status](#)



[Submit new RMA Request](#)



[Review your account profile](#)



[Product Return Policy](#)

(\*23 – RMA Portal Main Page)

Menu: Index Page | Return Policy | Submit a Request for RMA | Check RMA Requests/Cases Status

Find  in:

Request ID	RMA No.	RMA Date	Status	Items	Quantity	Requested On
<a href="#">20</a>			1. RMA Request Submitted	1	1	29-10-2014
<a href="#">49</a>			1. RMA Request Submitted	1	1	27-10-2014
<a href="#">48</a>	<b>RMA00043</b>	27-10-2014	2. RMA Case Opened	1	1	27-10-2014

(\*24 – RMA Portal Case Status Page)

## 2.4.1 RMA Approval Pending

The RMA with pending approval will appear on the list without RMA number and with the status “1. RMA Requested Submitted” (\*3), you can review the content of each submitted RMA by clicking on the “Request ID”.

Menu: [Index Page](#) | [Return Policy](#) | [Submit a Request for RMA](#) | [Check RMA Requests/Cases Status](#)

Find  in: RMA No.

Request ID	RMA No.	RMA Date	Status	Items	Quantity	Requested On
40			1. RMA Request Submitted	1	1	25-10-2014
49			1. RMA Request Submitted	1	1	27-10-2014
48	RMA00043	27-10-2014	2. RMA Case Opened	1	1	27-10-2014

(\*25 – RMA Porta Login Page)

## 2.4.2 RMA Approved

After receiving an email confirmation with the RMA approval you can verify it on the RMA Case Status page (\*26) that the approved RMA has now a RMA number and the status as exchanged to “2. RMA Case Opened”, and you are authorized to send the material to the repair centre.

Pressing on the RMA number it will open a RMA Detail page (\*27) and it's possible to confirm all the information, as this RMA is already approved the status is “2. RMA Case Opened” and the Remarks “Awaiting for Customer to Ship Items”.

To proceed with shipment there's available on bottom of the RMA Detail Page (\*27) the Packing List and Shipping Label for printing, for that just click over each option and it will open a new pop-up screen with the RMA Packing List (\*28) and the Shipping Label (\*29), on the left top corner of each pop-up screen there's a printing button. For shipping the material put the Packing List (mandatory) and the Shipping Label on the materials box.

Menu: [Index Page](#) | [Return Policy](#) | [Submit a Request for RMA](#) | [Check RMA Requests/Cases Status](#)

Find  in: RMA No.

Request ID	RMA No.	RMA Date	Status	Items	Quantity	Requested On
40			1. RMA Request Submitted	1	1	25-10-2014
49			1. RMA Request Submitted	1	1	27-10-2014
48	RMA00043	27-10-2014	2. RMA Case Opened	1	1	27-10-2014

(\*26 – RMA Portal Case Status Page)

Menu: [Index Page](#) | [Return Policy](#) | [Submit a Request for RMA](#) | [Check RMA Requests/Cases Status](#)


**RMA List**

RMA No.: RMA00043	RMA Date: 27-10-2014	Status: 2. RMA Case Opened	Last updated on: 27-10-2014
Request ID: 48	Requested On: 27-10-2014	Remarks: Awaiting for Customer to Ship Items	Updated By: 9600.enrives@petrotec.pt

Product Code	Serial No.	Description	Warranty Status	Findings	Insulation
200200	65655	EDDOR PTF 25-90 PET			

(\*27 – RMA Portal RMA Detail Page)

rma.petrotec.eu/rmapackingslip.aspx?rmano=RMA000043

Print 

<b>PETROTEC - Inovação e Indústria SA</b> Parque Industrial da Ponte Pav. C2 - S. João de Ponte 4805-661 S. João de Ponte Guimarães PT Tel. (+351) 253 479 300 Fax: (+351) 253 479 318		<b>Return Merchandise Authorization</b> RMA No.: RMA000043 RMA Date: 27-10-2014			
Account No.: 123456	Email Address: demo@demo.com	Phone:	Fax:		
<b>SENDER</b> Petroleum Inc. Parque Industrial 9999-999 Guimarães Guimarães		<b>SHIP TO</b> Petrotec - Inovação e Indústria SA Departamento de Qualidade Parque Industrial da Ponte Pav. C2 4805-661 S. João de Ponte Guimarães - Portugal			
Product Code	Description	Quantity	Serial No.	Reason For Returning	Detailed Problem Description
200201H81	0-MEDIDOR PTF 25-80 PET	1	555555	1. Defective	Medidor faz barulho metálico.

(\*28 – RMA Portal Paking List Page)

rma.petrotec.eu/rmashippinglabel.aspx?rmano=RMA000043

Print 

Petroleum Inc.  
Parque Industrial  
9999-999 Guimarães Guimarães

Petrotec - Inovação e Indústria SA  
Departamento de Qualidade  
Parque Industrial da Ponte  
Pav. C2  
4805-661 S. João de Ponte Guimarães - Portugal

(\*29 – RMA Portal Shipping Label Page)

### 2.4.3 Review RMA Case Open Status

To review all your RMA cases and verify the status of each one, go to the RMA Case List Page (\*30) and check the Status for each RMA, the available status list is:

- ◆ "1. RMA Request Submitted" – Customer submitted a RMA request (awaiting for approval);
- ◆ "2. RMA Case Opened" – RMA submitted case is approved and awaiting for material shipment;
- ◆ "3. RMA Request Denied" – RMA case denied, justification will appear on the denied details;
- ◆ "4. RMA Receiving in Progress" – RMA was received on the specified repair centre;
- ◆ "5. RMA Receiving Completed" – RMA received/confirmation completed with no issues;
- ◆ "6. Reception Complete (Non-Compliance)" – RMA reception completed with faults (see remarks for details);
- ◆ "7. RMA Inspection In Progress" – Quality department initialized the inspection;
- ◆ "8. RMA Inspection Completed" – Quality department inspection completed;
- ◆ "9. RMA Repairing In Progress" – Initialized the repairing process;
- ◆ "10. RMA Repairing Completed" – Repairing process completed;
- ◆ "11. RMA Ready for Shipment" – Items are packed and ready for shipment;
- ◆ "12. RMA Shipped" – RMA items sent to customer;
- ◆ "13. RMA Rejected" – RMA case rejected, justification will appear on the rejected details;
- ◆ "14. RMA Cancelled" – RMA case cancelled, justification will appear on the cancelled details;

◆ "15. RMA Completed" – RMA case concluded;

On each RMA it's possible to see the details of each inserted item, go to the RMA List Page (\*30) and select an Open Case (\*3). In the RMA Detail Page (\*31) it's possible to review all the inserted items and the inspection attachments (\*33) if available. Clicking on an item inside a RMA Case you will enter the Item Detail Page (\*32) in this page is possible to review the initial request information and also verify the several available status (Warranty/Findings/Resolution). The available status lists are:

◆ Warranty Status

- Under Warranty Period
- Out of Warranty Period
- Out of Warranty Conditions
- Not Applicable

◆ Findings Status

- No Issues Found
- Damaged in Shipping
- Missing Item
- Wrong item
- Wrong Quantity
- Wrong Serial Number
- Item with Damages

◆ Resolution Status

- Irreparable
- Repaired under Warranty
- Replaced under Warranty
- Repaired out of the Warranty Conditions
- Out of Warranty
- Cancelled by the Customer

Menu: [Index Page](#) / [Return Policy](#) / [Submit a Request for RMA](#) / [Check RMA Requests/Cases Status](#)

Find:  in:  RMA No.

Request ID	RMA No.	RMA Date	Status	Items	Quantity	Requested On
50			1. RMA Request Submitted	1	1	26-10-2014
49			1. RMA Request Submitted	1	1	27-10-2014
48	RMA000043	27-10-2014	12. RMA Shipped	1	1	27-10-2014

(\*30 – RMA Portal RMA Case List Page)

[RMA List](#)

RMA No.: RMA000043	RMA Date: 27-10-2014	Status: 12. RMA Shipped	Last updated on: 26-10-2014
Request ID: 48	Requested On: 27-10-2014	Remarks:	Updated By: deco.esquivel@petrotec.pt

Product Code	Serial No.	Description	Warranty Status	Findings	Resolution
200201401	006655	DABEODOR PTF 25-60 PET	1. Under Warranty Period	0. No Issues Found	2. Repaired under Warranty

[Print RMA Packing Slip](#) | [Print Generic Shipping Label](#) | [View Inspection Attachments](#)

(\*31 – RMA Portal RMA Detail Page)



Menu: [Index Page](#) | [Return Policy](#) | [Submit a Request for RMA](#) | [Check RMA Requests/Cases Status](#)

**RMA List**

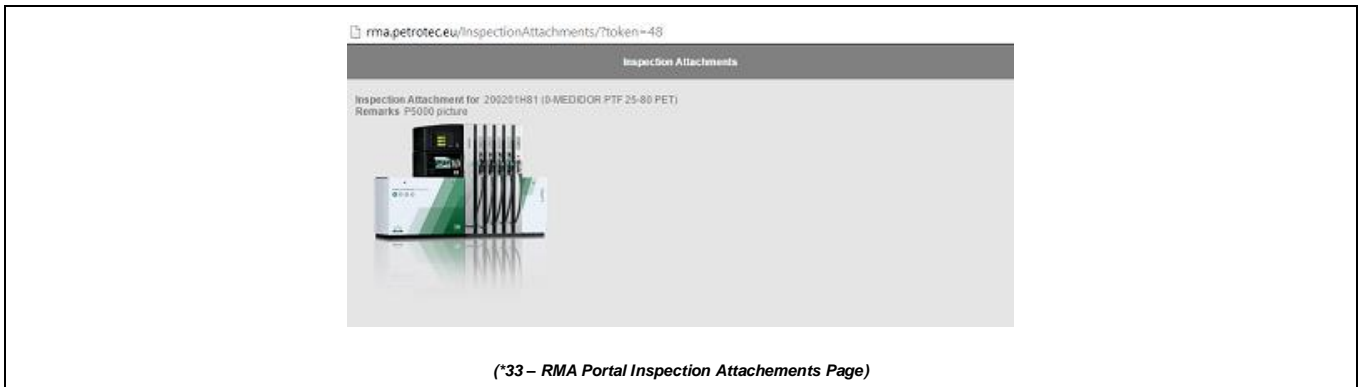
RMA No.: RMA020042	RMA Date: 27-10-2014	Status: 12 RMA Shipped	Last updated on: 28-10-2014
Request ID: 48	Requested On: 27-10-2014	Remarks:	Updated By: delio.ecceves@petrotec.pt

Product Code	Serial No.	Description	Warranty Status	Findings	Resolution
200201H81	66666	0-MEDIDOR PTF 25-80 PET	1. Under Warranty Period	0. No Issues Found	2. Repaired Under Warranty

**Item Information**

Product Code: 200201H81  
 Description: 0-MEDIDOR PTF 25-80 PET  
 Serial No.: 66666  
 Sales Doc. No.: 0T 12013  
 Dispenser Serial Number: 120120120  
 Quantity: 1  
 Reason For Retaining: 1. Defective  
 Detailed Problem Description: Medidor faz barulho nestillo.  
 Request Action: 1. Repair Under Warranty


(\*32 – RMA Portal Item Detail Page)



rma.petrotec.eu/InspectionAttachments/?token=48

**Inspection Attachments**

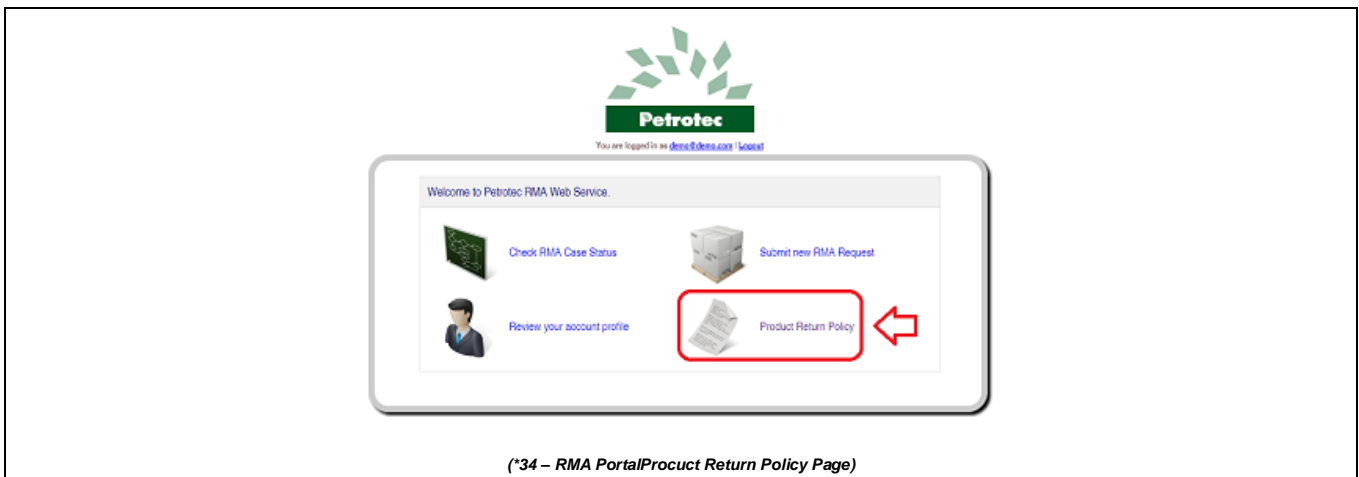
Inspection Attachment for: 200201H81 | 0-MEDIDOR PTF 25-80 PET  
 Remarks: F5030 picture



(\*33 – RMA Portal Inspection Attachments Page)

## 2.5 RMA Return Policy

To check our Return Policy press “*Product Return Policy*” (\*34) on the main page.



**Petrotec**  
You are logged in as [delio@delio.com](#) | [Logout](#)

Welcome to Petrotec RMA Web Service.

- [Check RMA Case Status](#)
- [Submit new RMA Request](#)
- [Review your account profile](#)
- [Product Return Policy](#)** ←

(\*34 – RMA Portal Product Return Policy Page)