

Merchandise Returns

Processing returns is a part of doing business. You can use your Eagle system to provide sensible customer credits, while also maintaining an accurate inventory count. By creating standardized store procedures you will ensure a great shopping experience for your customers and offer solid guidance to your employees.

Eagle Point of Sale provides two ways to return merchandise. Credit Memos are used when a customer is only returning items, while Line Item Credits are used if a customer is returning some items, while purchasing others. You'll learn the details for both methods of handling returns in this course. We'll also look at some tools that help ensure that the transaction is valid, and handled according to your store's policies.

Topics

- Set Up Returns
- Credit Memos
- Line Item Credits
- Store Vouchers
- Gift Cards

Set Up Returns

We will get started by examining the options and security settings related to returns validation.

Options ID 8305 can be set to take advantage of the tracking capabilities in Eagle.

When this option is set to Y, exchanges and returns are dependent on prior purchases, and you will have access to the Returns Viewer to further investigate trends and possible problems.

You will want to examine the other option ID's related to Return Validation.

Based on your business model, you can determine; how many months of history to view at POS if returns should be posted against the oldest or most recent sale and if the current or the original cost should be used.

You can set option ID 5494 to Yes so that contact information is captured when the cash customer account is selected during a return. Returns can be an area vulnerable to fraud.

You can require this information at POS and validate randomly selected returns with a simple phone call.

Options ID 8414 and 8416 will also be specific to your business.

By editing the return item reason code table, you can enter up to 12 specific descriptions to better track what is being returned.

Use the 'Search' field in Options Configuration to easily locate all options that reference Returns Validation.

There are several security bits that will need to be reviewed to use the Returns Validation function.

A full list, along with detailed descriptions of each, is available in the Eagle Help files under the title "Returns Validation: Options and Security".

Best Practice dictates that only upper level management should have access to override invalid returns.

Credit Memos

With returns validation configured, let's take a look at how to process a basic Credit Memo.

We'll start on the posting screen, just as you would for a regular sale transaction.

When a customer is only returning merchandise and not purchasing anything else, just press the 'Credit' key from the ribbon menu.

Notice that the Transaction Type changed from SALE to CREDIT MEMO.

Select the customer that is returning the item, then scan or enter the SKU for the first item.

The Returns Validation window displays and you can view the prior purchases of this item.

Highlight the correct sold item.

If an the item has never been purchased in your store by this particular customer, or if there is no outstanding available quantity to return against, the system can be set up to display a warning message by enabling the security bits mentioned earlier.

Select the Type of return.

If a customer returns an item in good condition, meaning it can be resold, choose code R.

If the item is defective, choose D so that a credit can be requested from your vendor.

You'll use the final code, E, if a customer brings in a damaged or defective item and would like to exchange it for the exact item.

This reports the original defective item to defective shrinkage, while the new item is pulled out of inventory.

For better tracking of your return activity, your clerks should also select one of the reason codes that you created.

Once you select the proper return code, the item is posted to the grid.

The Codes column shows the return code that you chose.

If this return is an Exchange, you'll see an extended cost of \$0.00 in the posting grid.

A comment line is added to the transaction displaying the original invoice number and original invoice date.

Total the transaction as you normally would.

If this was a return for a cash customer and you set option ID 5494 to yes, the clerk will be required to obtain a name and phone number.

Follow your documented store policy to tender the transaction for the customer.

Typically, the refund tender is the same as that used in the original sale.

For instance, if the original purchase was paid by cash, you would enter the amount being refunded in the box marked "Cash".

Check with your supervisor to confirm your store's policy for refund tenders.

Line Item Credits

When a customer is returning an item, but also making a purchase you can process this within the same transaction.

Begin the ticket as you normally would and scan or enter the sku they wish to return.

Enter the quantity being returned and then press the CREDIT key on the ribbon menu instead of pressing Enter.

Complete the information needed for Returns Validation and hit Enter.

The returned item's extended cost will display in red when it is posted to the grid.

Continue scanning any other returns and purchases.

Once all items have been posted, total the transaction as usual.

The Totals screen displays a refund total or an amount due, based on the items that were purchased and returned.

If the customer has a credit balance at the end of the transaction, you'll follow your store's policy in tendering that amount. Check with your supervisor to see if cash or credit card refunds are allowed.

Depending on your receipt policy or the type of item being returned, a store credit may be the correct option.

We will discuss vouchers and gift cards in a moment.

Returns validation also provides access to the Customer Returns Viewer.

This can be accessed through the main browser under the Sales Review Menu or in the POS header screen by opening the miscellaneous menu.

You must have security bit 802 "Access Customer returns viewer" to use this viewer.

Here you can view all regular, defective, and exchange for defective returns for a specific customer, range of dates, or specific clerk.

If you have questions or concerns about a clerks or customers return history, you can easily conduct further research in this grid.

Store Vouchers

Store Vouchers are another tool to use for returns that qualify as exceptions to your store's return policies.

Store vouchers are an alternate tender in POS and can be found in the Tender section of the ribbon menu.

You can also press F2 to trigger the pop-up menu.

You can specify a minimum amount so that cash customers with a refund less than the specified minimum would get cash rather than a voucher.

ID number 5488 in Options Configuration determines whether or not you want to force clerks to issue a voucher to cash customers in lieu of returning cash, when giving a refund.

Security bit 684 will need to be enabled to override any exceptions.

You can review the online help titled 'Setting Up Store Vouchers' for step by step instructions.

The cash customer's information prints on the customer's receipt and is automatically stored in Quick Recall.

The system does not keep track of outstanding voucher balances; therefore, you'll want to retain a copy of individual vouchers.

When a customer wants to use a store voucher toward a purchase, and the voucher's value is greater than the purchase, the system can "re-issue" a new voucher for the remaining amount.

During a re-issue, the clerk is prompted for name, phone number, and original transaction number, all of which will print on the re-issued store voucher.

Gift Cards

In addition to vouchers, your store may offer gift cards for customers who don't have their original receipts.

If your store is set up to issue gift cards for returns without receipts, the gift card activation window automatically displays when you total the return.

This reminds you to activate the gift card to complete the transaction.

You can get more information on gift card set up and activation by watching the Training on Demand courses listed under the In-Store Gift Cards category in the course catalog.

Every business needs to control the returns process to prevent fraudulent activity.

It's critical that you have a documented return procedure that managers, clerks, and customers are familiar with.

Using Eagle features like Returns Validation can help you enforce your policies and maintain the proper flow of merchandise in and out of the store.

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