



Processing returns is a part of doing business.

You can use your Eagle system to provide reasonable customer credits while maintaining an accurate inventory count.

In this course we will go over the setup and options available with the Eagle Returns Validation feature.

We will take a look at Point of Sale Credit Memos and Line Item Credits.

All of this activity can be analyzed in the Customer Returns Viewer and finally we will explore the use of Store Vouchers and In Store Gift Cards.

There are many Options Configuration settings that relate to returns and the Eagle Returns Validation function.

These have been listed in the documentation located in the Course Materials section here, on your Training on Demand site.

Please print this document and review each Options ID to ensure that you are following Best Practices and creating a clear and concise 'Returns Procedure' for your store.

Eagle Release 25.1 and higher offers a Returns Validation enhancement.

The main intent for this feature is to alert the store of potential fraudulent patterns where a customer is attempting to return stolen merchandise

The report 'Customer Returns Eligibility Report' or RCEM, should be added to a daily queue.

This will tally the number of times within a given number of days that a Driver's License was required for a return that did not accompany a receipt. RCEM will also generate an alert for each Driver's License it flags as 'Not eligible for returns'.

The related Options Configuration and Security settings are clearly outlined in the attached documentation located in the Course Materials.



Credit Memos are used when a customer is only returning merchandise and not purchasing anything else.

Let's start on the posting screen, just as you would for a regular sales transaction.

Press the 'Credit' button 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.

The 'Returns Validation' window displays and you can view prior purchases.

Highlight the correct sold item.

If an 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.

Select the 'Type' of return.

If a customer returns an item in good condition, and 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 item to 'Defective Shrinkage', while the new item is pulled out of inventory.

Best Practice is to require your clerks to always select one of the reason codes that you have created.

Enter the correct quantity and press Enter or click 'OK'.

The 'Codes' column displays the Return Code that was chosen.



If this return was an Exchange, you would see an extended price of \$0.00 in the posting grid.

A Comment Line is added to the transaction displaying the Original Invoice Number and the Original Invoice Date.

Total the transaction as you normally would.

Best Practice will require the clerk to obtain at least the Cash customer's 'Name' and 'Phone Number'.

Additionally, on Eagle Software Release 25.1 and higher you can mandate Driver's License information be entered when items are returned without a receipt.

Users of 'Flexible Consumer Collection' can even require additional input. Review the course with the same name for more details.

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'.

Eagle Software Release 25.1 and higher offers the ability to direct clerks to only apply refunds to the original tender type.

Check with your supervisor to confirm your store's return policy or as a manager, be sure your policy is clear and well communicated.

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' button on the ribbon bar 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, follow your store's policy to tender that amount.

Obtain payment as usual for any amount due.

If you need to return to the Posting screen, you may do so by pressing 'Escape' or the Post button before you complete the transaction.

Returns Validation provides data to the Customer Returns Viewer.

This can be accessed through the Eagle browser under the 'Sale Review Menu' or in the POS header screen within the miscellaneous menu.

Here you can see all Regular, Defective, and Exchange for Defective returns for a specific Customer, a Range of Dates, or a specific Clerk.

With Eagle Software Release 25.1 and higher, the 'Customer Returns Viewer' provides a new option under the 'Miscellaneous Menu'.

Choose number 6, 'Driver's License Maintenance'.

Here you can manually change a Customers Drivers License 'Eligible for Returns?' flag.

Release 25.1 and higher also provides the new lookup 'Driver's License Number' used to see the list of returns where the customer submitted their Driver's License information.



Several columns have been added to this viewer including, 'DL Eligibility for No Receipt Returns', 'Driver's License Date Added', and 'Driver's License Last Updated'.

Store Vouchers are another tool to use when transactions qualify as exceptions to your store's return policies.

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

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

Store vouchers can be found in the Alternate Tender section of the ribbon menu on the POS Totals screen.

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

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

Eagle does not keep track of outstanding voucher balances so you will want to retain a printed copy of each.

When a customer wants to remit 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.

In addition to Store Vouchers, you may offer Gift Cards for customers who do not present their original receipts.

If your Options Configuration settings are directed to issue gift cards for returns without receipts, the activation window automatically displays when you total the return.



You can get more information on gift card set up and activation by watching the Training on Demand Agenda titled, 'In Store Gift Cards'.

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

Creating a standardized, well communicated store procedure for Credit Memos and Line Item Credits will ensure a great shopping experience for your customers and offer solid guidance to your employees.

Using Eagle features like Returns Validation, Store Vouchers and In Store Credit Cards can help you enforce your policies and maintain the proper flow of merchandise in and out of the store.

