



Left unmanaged, inventory returns can create issues that negatively impact your store's profitability.

In this course, you will learn how to manage and enforce all aspects of a documented Returns Policy.

We will also explore the Customer Returns Viewer, the use of POS Adders, the Price Exception report and some Defective Returns auditing tools.

The first step in managing returns at Point of Sale is having a documented and well-communicated Returns Policy.

To properly create such a program, ask yourself the following:

- Are we tracking returns?
- Are receipts required for returns?
- Do we offer Gift Cards or In-Store Vouchers?
- Is there a fee for returning certain types of merchandise?
- Is there a time limit to return merchandise at our store?
- Do we track credits from our vendors?

When you look at Best Practices for stores with successful returns policies, you will see that they have several things in common:

- Receipts are required, or there are specific guidelines in place for returns with no receipt.
  - A dedicated Returns desk is set up, or a Manager's approval is required for returns.
  - Customer information such as name and phone number must be provided before returns are approved.
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- Time limits on returns are in place and enforced.
- Policies spell out how to deal with special order returns and the use of restocking fees.

The Returns Validation feature is designed to help you enforce these Best Practices by validating returns against past purchases.

For more information on Returns Validation, carefully review the Training on Demand course called 'Merchandise Returns'.

You may also institute a Gift Card Program to provide a means for customers to receive store credit for returns without a receipt.

The course, 'In Store Gift Card Overview' is a good way to begin to research this option.

Use the information in this course along with the other classes previously mentioned to form your store's policy.

And remember, the most important step is to document the procedures and fully communicate them to staff and to customers.

Now we will take a look at the Customer Returns Viewer. This grid enables you to pinpoint issues within your inventory, Point of Sale, and even personnel.

Start by launching the Customer Returns Viewer from the Sales Review Menu on your Eagle Browser or by typing 'CRV' in the Launch bar.

The Customer Returns Viewer looks and works like other Eagle viewers. Typical viewer functionality is available, including sorting and filtering by column.

All the returns made in your store are displayed when the viewer opens.

The fields at the top of the screen, or header, allow you to view returns made by a specific customer, within a particular date range, or by a specific clerk.



Entering a customer's number here, for instance, and pressing 'Refresh' brings up all the returns for that customer.

Filtering by 'Clerk' allows you to compare returns made by your staff.

Remember to press 'Refresh' to see the results any time you enter new search criteria.

At any time, you can double-click a return to view the transaction document.

The option to view the original purchase as well as the return appears if you are using 'Returns Validation'.

Save your View as you would any other and customize the grid to your needs.

Another feature that is helpful in controlling returns costs are Point of Sale 'Adders'.

These are fees that can be added to any transaction total.

When used with returns, an Adder can function as a restocking fee.

Adders can be set up to be manually entered at the end of the transaction, to be a flat amount, calculate amounts for varying dollar ranges, or use a percentage by dollar range.

You can include or exclude Special Records in the calculation or assign Adders to particular customers.

Adders print in the sub-totals section of the customer's receipt or invoice.

Review the Eagle Online Help document titled, 'POS Adders Overview' and use the 'Related Topics' link to get step by step setup and use instructions.

The Price Exception Report can be used to analyze daily credit and defective returns.

You can launch it manually from the Point of Sale 'Reports' menu or by typing RPE in the launch bar.



However, this is not necessary as it will be run each day as part of your automated report queue.

In the Spooler, the report with Option X lists only Defective Returns.

The copy with Option C lists all items returned for credit at a price that was different than the system price.

Each should be opened and reviewed.

Let's open the one with Option X.

Note that the summarized information can be used as an auditing tool.

Having a designated spot for all defective items allows you to easily verify that the items on this report are in fact defective and to determine if they are eligible for vendor credit.

Tracking Defective Returns and then verifying that you receive the corresponding vendor credit is another Best Practice when managing your business.

To create these Purchase Orders automatically, you must have the electronic catalog for this vendor on your Eagle system

Review the Online Help document titled 'Generating POs for Defectives with RDI' for the required set up.

The Daily Inventory Update Report, or RDI, runs during your normal end-of-day processing and places SKUS on a defective PO if they have a return type of 'D' for Defective or 'X' for Exchange for Defective.

Using Option 'C', Create Defective POs, searches the purchase order file and looks for an existing Defective Purchase Order for the vendor of the item in question.

If it finds one that has not been transmitted, it adds the SKU to the PO.



If the SKU is already on the PO, the system adds the quantities together so that only one line item is listed.

If you are a True Value or Do It Best member, you can electronically transmit defective purchase orders.

Defective POs created for any other vendor can be sent via fax or email.

To complete the process check your vendor statement to be sure you receive the correct credit amount.

Eagle offers you several ways to track and manage your returns.

By creating a well-documented returns policy that incorporates proven Best Practices, you can create real impact on your profit margin.

Analyzing activity in the Customer Returns viewer, making use of Adders, along with the RPE and RDI reports allows you to easily pinpoint trouble areas before they have a negative influence on your business.

