Setting Up and Using Returns

Occasionally, a customer might want to return an item they have purchased in exchange for a refund, store credit, or a similar item.
Returns must be handled correctly to ensure accurate inventory values and customer history.

This course shows you how to configure return parameters to match your store's policy. We will also show you how to set up returns with and without receipts.

Objectives

- Setting Up Returns

- Accepting Returns With a Receipt

- Accepting Returns Without a Receipt

Setting Up Returns

From the main menu, select **Sales** and then **Setup.**
Select **Returns.**

In the GENERAL section, keep the *Allow Returns to Gift Card* toggle turned *on* if a customer can receive a gift card in the amount of the return.
If the toggle is switched *off*, the returns without a receipt will be refunded as cash.

In the *Return Reasons* section, you can add, edit or remove reasons *why* a customer can return the item.
Use the *plus* button to add a reason and the *minus* button to remove a reason.
You cannot *delete* a reason if you have already used it while creating a *sales* return in POS.

We have two tabs *here*: Return With Receipts and Return Without Receipts.

The *Return With Receipts* tab has two sections.

You can configure your return rules in the *Rules* section.
Set the number of days for the purchase amount and price to be validated.
The value marks the number of days a receipt history can be searched from the date of purchase.
Determine how long after a customer has purchased an item that a refund can be given to them.
The receipts after this time will be refunded according to the return *without* receipts rules.
Determine whether the POS clerk will be prompted to ask for customer information.
Use the *Capture Signature on Returns* toggle if you wish to capture signatures on returns at POS.
By default, the *Show Eligible return items on Quick Find* toggle is *on.*
It lets you view the list of eligible return items in the **Quick Find** panel at POS.
You can easily select the item your customer wants to return once you locate the original transaction.

From the *Price Honored* drop-down, choose which price will be honored if the item is found in multiple transactions.
Enter the maximum refund amount allowed *without* a manager override *here.*
Any amount above this will need a manager override.

In the **Tenders Allowed for Manager Override** section, identify which tenders can be given to the customer for a return with a manager override.
Use the *plus* button and then select the tender from the drop-down menu. Repeat the process to add multiple tenders.
You can select the *minus* button to delete tenders.

On the **Return Without Receipts** tab, you can see that many of the same options are given. Set these as well, based on your store policy.
Choose which price will be honored if the item is found in multiple transactions from the *Price Honored* drop-down.
Enter the number of days from the date of purchase that the history can be searched.
If the transaction is *not* found within the specified number of days, the *current* price will be honored for the return.
Use the *Prompt for Customer Information* and *Capture Signature on Returns* toggles to prompt the POS clerk to ask for customer information and capture signatures as needed.
Enter the *maximum* refund amount allowed without a manager override *here*.
Any amount above this will need a manager override.

If the **Allow Returns to Gift Card (Merchandise Card)** toggle is switched *on* in the GENERAL section, the refunds for returns without receipts will be processed to a gift card issued at POS.
If not, the refunds will be processed as cash.
You can also add tenders that can be made available for refund upon a manager's override at POS using the *plus* and *minus* buttons.

Finally, tap **Save** to save the details.

Accepting Returns With a Receipt

Let's take a look at how returns work when a customer returns purchased goods to the seller.

From the main menu, select **Sales > POS.**

The posting screen is displayed.

Switch on *this* toggle for Return mode.
Alternatively, you can press the F8 key on your keyboard to switch to Return mode.

You will be prompted to enter the customer's name or transaction number.
If the customer has a receipt, simply enter the transaction information *here*.
If not, choose **No Receipt.**

For instance, customer "Anne Beasleg" wishes to return an item purchased from your store.
Enter her name *here* and press the **Find** button.
The transactions that are eligible for returns are marked with a green tick.
Return All Eligible Item is disabled when multiple receipts are populated.
Tap **Done.**

Enter the details for items being returned *here*, or tap **Return Items** to view the list of items that are returnable for this customer.
If the item is not available on any receipt, you must locate the original transaction or use the 'No Receipt' process.

Now, select the item for return.

A prompt asking for the Return Type and Return Reason appears.
Remember that a type of return will increase your QOH and defective will have no effect on QOH.
Enter the details and tap **OK.**

Select Make Payment.

You can view the amount to return on this page.
Complete the transaction like you normally would.

You will be prompted with the return receipt alongside the return summary.
At any given point, if you wish to return to the posting screen, you can hit the **Esc** key on your keyboard.

Accepting Returns Without a Receipt

Sometimes a customer walks in and wishes to return items without receipts.
In that case, after enabling *Return* mode in POS, select **No Receipt** in the pop-up.

You will be prompted to enter the customer information for the return.
Enter the mandatory information and tap **OK.**

In the POS posting screen, search for the item or browse the Quick Find panel.

Once you add the item, the *SELECT RETURN TYPE AND REASON* pop-up displays.
Fill in the fields and tap **OK.**

The item list can be found on the posting screen.
Select Make Payment to continue with the return transaction.

You can see the Merchandise Credit on this page alongside the return receipt summary.

Recap

You can easily set up a few parameters to control how your business handles refunds and exchanges.

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For more information, refer to the help articles, videos, and guided learning.

In this course, we showed you how to set up and use point of sale returns.

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