

PALADIN DATA CORPORATION™

# Biz Coach Webinars



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## Best Practices: Customer Returns

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- How to return items without a receipt
- How to return items with a receipt
- How to return a defective item
- Additional return settings
- Learn more



## Returns with no receipt



In the **Invoice/Quote** module:

1. In the **Customer** box, enter the customer's name or account number, if the customer is known.
2. Click **Advanced Lookup** or press **F1**.
3. Click the **History** tab.
4. Select **Part**.
5. Scan the part UPC code or enter the part number.
6. Select the correct item by verifying the **Price Sold** and **Date Sold** values.
7. In the **Qty** box, enter **-1**, and then press **Enter**.
8. Click **Add Items to Invoice** or press **F8**.
9. Complete the transaction.



## Returns with a receipt



In the **Invoice/Quote** module:

1. In the **Customer** box, enter the customer's name or account number, if the customer is known.
2. Click **Advanced Lookup** or press **F1**.
3. Click the **History** tab.
4. Scan the receipt barcode, or enter the invoice number.
5. Select the returned item.
6. In the **Qty** box, enter **-1**, and then press **Enter**.
7. Click **Add items to Invoice** or press **F8**.
8. Complete the transaction.



### Process a defective item that is returned by a customer

The screenshot displays a software interface for processing a return. At the top, there are tabs for 'Invoice / Quote' and 'Checkout'. Below these are fields for 'Rewards', 'Credit', 'Customer', and 'Address 1'. A table lists items with columns for 'Tax', 'Def', 'Net', and 'Part Number'. The first item is 'PS21-21A POCKET DRIVER 12V 2' with a quantity of 1 and a price of 7.25. The 'Def' checkbox is checked. A blue arrow points from this 'Def' checkbox to the 'Defective:' field in the 'Inventory module' summary at the bottom. The 'Inventory module' shows 'On Order: 2', 'Defective: 1', 'On Hold: 2', and 'Stock On Hand: 5'. A blue box labeled 'Advanced Lookup' is positioned near the table, and another blue box labeled 'Inventory module' is positioned near the summary.

Tax	Def	Net	Part Number	Quantity	Price
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	000183	1	7.25
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0001...	2	

Advanced Lookup

Inventory module

On Order: 2    Defective: 1    On Hold: 2    Stock On Hand: 5

- When a customer returns a defective item, select the **Def** checkbox and then, add the item to the return invoice. When you process the return, the item will be added to your defective inventory, and the inventory item stock on hand (SOH) will not be updated.
- Learn more: [Webinar: Return to sender – defective items](#)



## Additional return settings



During checkout, Paladin Point of Sale can prompt for a required signature before allowing a return.

1. On the **File** menu, click **Setup**.
2. Click the **Invoice (Store)** tab.
3. In the **Invoice** pane, select **Require Signature for Returns**.
4. Click **Save**, and then click **Close**.



## Additional return settings



Prevent a return from occurring without a manager's password.

1. On the **File** menu, click **Setup**.
2. Click the **Company** tab.
3. In the **Manager Approval Required** pane, select **Returns Require Manager Approval**.

**Note:** To allow returns that do not require manager approval, in the **Require Manager Approval for Returns Over** box, enter the maximum amount.

4. Click **Save**, and then click **Close**.



## Additional return settings



Require your staff to verify the purchase and add the original invoice number to the return invoice.

1. On the **File** menu, click **Setup**.
2. Click the **Invoice (Store)** tab.
3. In the **Invoice** pane, select **Capture Return Item Invoice Number**.
4. Click **Save**, and then click **Close**.





## Learn more

To learn more about this topic, see the following resources in our [Help Portal](#):

- [About returns](#)
- [About defective items](#)
- [Webinar: Return to sender – defective items](#)

A recording of this webinar will be available at [portal.paladinpos.com/webinars](http://portal.paladinpos.com/webinars).

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