PALADIN DATA CORPORATIONTM

# Biz Coach Webinars

FREE ADVANCED TRAINING



## Return to vender

Chad Klein



**TECHNICAL LEVEL:** 

**EASY** 

**INTERMEDIATE** 

**ADVANCED** 





## What we'll cover

- Returning items with a receipt
- Returning items without a receipt
- Returning defective items
- Item return settings



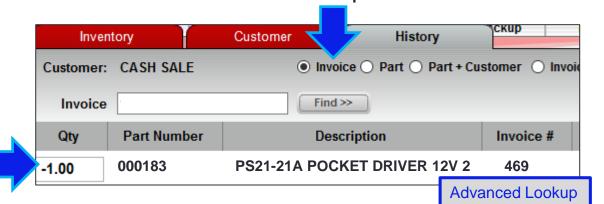
## Coach Webinars

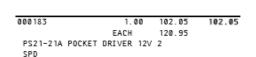


#### Return to vender

# Returning items with a receipt

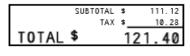
- 1. In Paladin Point of Sale, on the top ribbon, click the **Inventory/Quote** module or press Alt + 1.
- 2. On the bottom ribbon, click **Advanced Lookup** or press F1.
- 3. Click the **History** tab.
- 4. Scan the barcode on the customer's receipt to display the sold items.
- 5. For each returned item, in the **Qty** box, enter the number of returned items as a negative quantity, and then click **Add Items to Invoice** or press F8.
- 6. Finish the transaction to complete the return.





Coupon 1.00 0.00 0.00 EACH NONTAX

Rewards Coupon for \$5.00



CASH 121.40

EMPLOYEE	TERM	INV#	TIME	DATE
1	2	469	10:07	20-Jan-17

Your receipt guarantees your no-hassle-return.

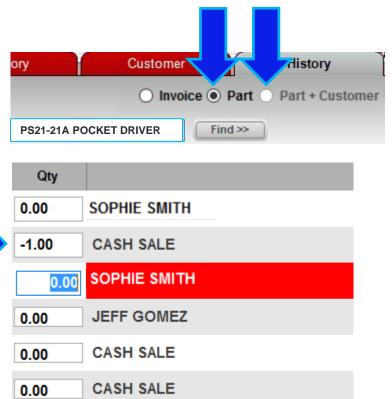
We're your source for seasonal supplies and all your hardware needs.







## Returning items without a receipt



**Advanced Lookup** 

**CASH SALE** 

0.00

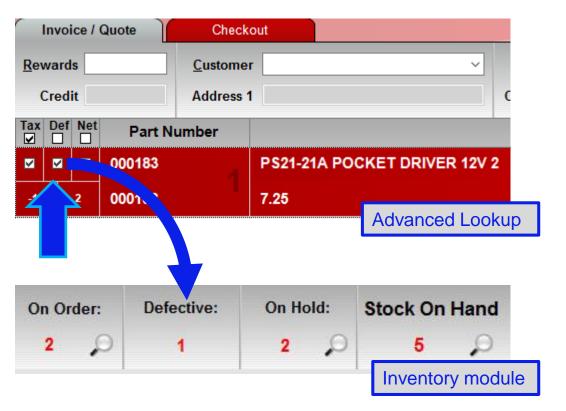
- 1. In Paladin Point of Sale, on the top ribbon, click the **Inventory/Quote** module or press Alt + 1.
- 2. [Optional] Select the **Customer**.
- 3. On the bottom ribbon, click **Advanced Lookup** or press F1.
- 4. Click the **History** tab.
- 5. If a customer is selected, select **Part + Customer** to display purchases by that customer. Otherwise, select **Part**.
- 6. Scan the returned item's barcode to display a list of sales.
- 7. To display the invoice for any sale, double-click the row.
- 8. When you identify the sale, in the **Qty** box, enter the returned item quantity as a negative number, and then click **Add Items** to **Invoice** or press F8.
- 9. Finish the transaction to complete the return.







## Returning defective items



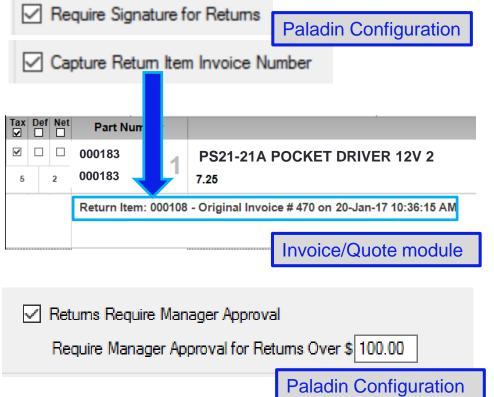
If the returned item is defective, after you add the item to the return invoice, select the **Def** checkbox. This places the item in your defective inventory and does not return it to your available stock on hand (SOH).

To learn more about defective items, watch the previous webinar <u>Return to sender</u> on our Help Portal (http://portal.paladinpos.com/webinars).





## Item return settings



The following options can be set in the **Paladin Configuration** window. To open this window, in Paladin Point of Sale, on the **File** menu, click **Setup**.

- Invoice(Store) tab options:
  - Require Signature for Returns: Require a signature from the customer that returns an item.
  - Capture Return Item Invoice Number: Add the original invoice number for a returned item to the return invoice.
- Company tab options:
  - Returns Require Manager Approval
     Require Manager Approval for Returns Over\$
     Require a manager password if the returned amount is over a specified dollar amount.



#### 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

A recording of this webinar will be available at <u>portal.paladinpos.com/webinars</u>.

PALADIN DATA CORPORATIONTM

# Biz Coach Webinars

FREE ADVANCED TRAINING



## Return To vender

Chad Klein



**TECHNICAL LEVEL:** 

**EASY** 

**INTERMEDIATE** 

**ADVANCED**