

PALADIN DATA CORPORATION™

Biz Coach Webinars

FREE ADVANCED TRAINING



Return to vender

Chad Klein



TECHNICAL LEVEL:

EASY

INTERMEDIATE

ADVANCED



Return to vender

What we'll cover



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



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.

000183	1.00	102.05	102.05
	EACH	120.95	
PS21-21A POCKET DRIVER 12V 2			
SPD			

Coupon	1.00	0.00	0.00
	EACH		NONTAX
Rewards Coupon for \$5.00			

SUBTOTAL \$	111.12
TAX \$	10.28
TOTAL \$	121.40

CASH	121.40
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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.

INVOICE



Qty	Part Number	Description	Invoice #
-1.00	000183	PS21-21A POCKET DRIVER 12V 2	469

Advanced Lookup



Return to vender

Returning items without a receipt

Customer History

Invoice Part Part + Customer

PS21-21A POCKET DRIVER Find >>

Qty	
0.00	SOPHIE SMITH
-1.00	CASH SALE
0.00	SOPHIE SMITH
0.00	JEFF GOMEZ
0.00	CASH SALE
0.00	CASH SALE
0.00	CASH SALE

Advanced Lookup

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.



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Returning defective items

The screenshot shows a software interface for a return invoice. 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. The 'Def' checkbox is checked. A blue arrow points from the 'Def' checkbox to the 'Inventory module' section below. The 'Inventory module' shows 'On Order: 2', 'Defective: 1', 'On Hold: 2', and 'Stock On Hand: 5'. A blue box labeled 'Advanced Lookup' is also present.

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

Advanced Lookup

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

Inventory module

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 [Return to sender](http://portal.paladinpos.com/webinars) on our Help Portal (<http://portal.paladinpos.com/webinars>).



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Item return settings

 Require Signature for Returns

Paladin Configuration

 Capture Return Item Invoice Number

Tax	Def	Net	Part Num	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	000183	1 PS21-21A POCKET DRIVER 12V 2
5	2		000183	7.25

Return Item: 000108 - Original Invoice # 470 on 20-Jan-17 10:36:15 AM

Invoice/Quote module

 Returns Require Manager Approval

Require Manager Approval for Returns Over \$

Paladin Configuration

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.



Return to vender

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 portal.paladinpos.com/webinars.

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