Utilizing Return Forms

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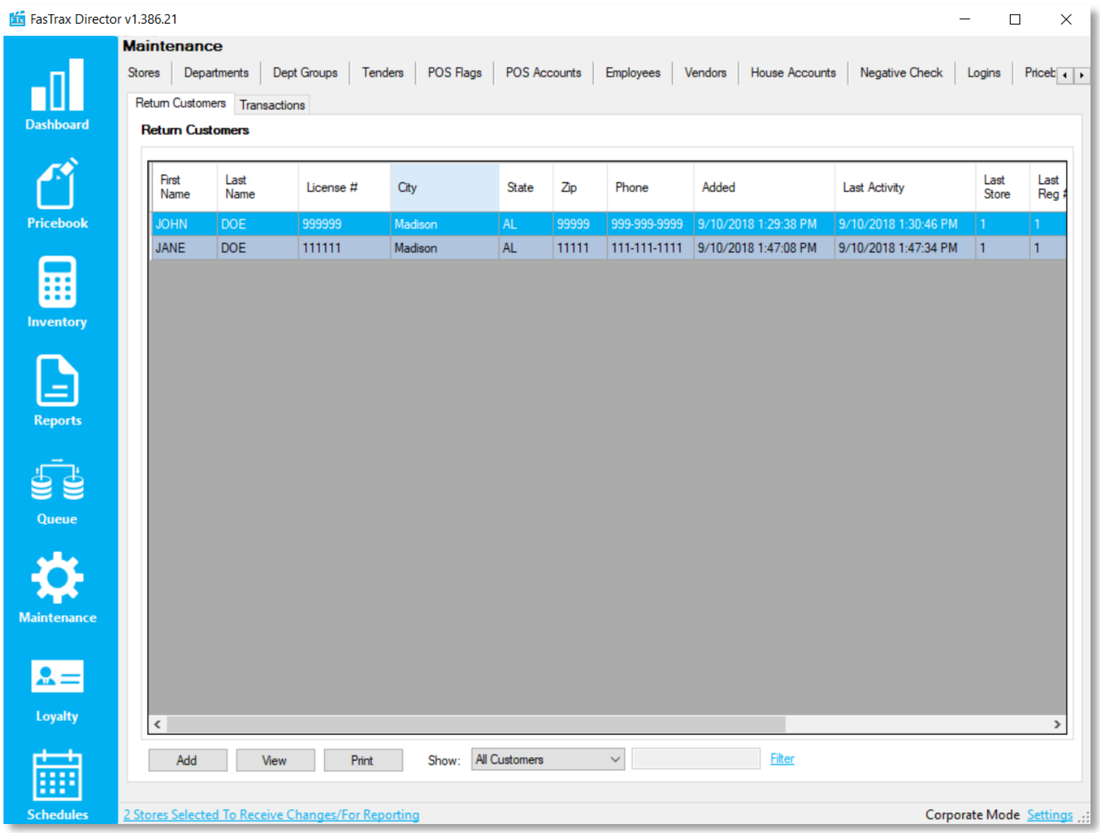
Overview of Return Forms

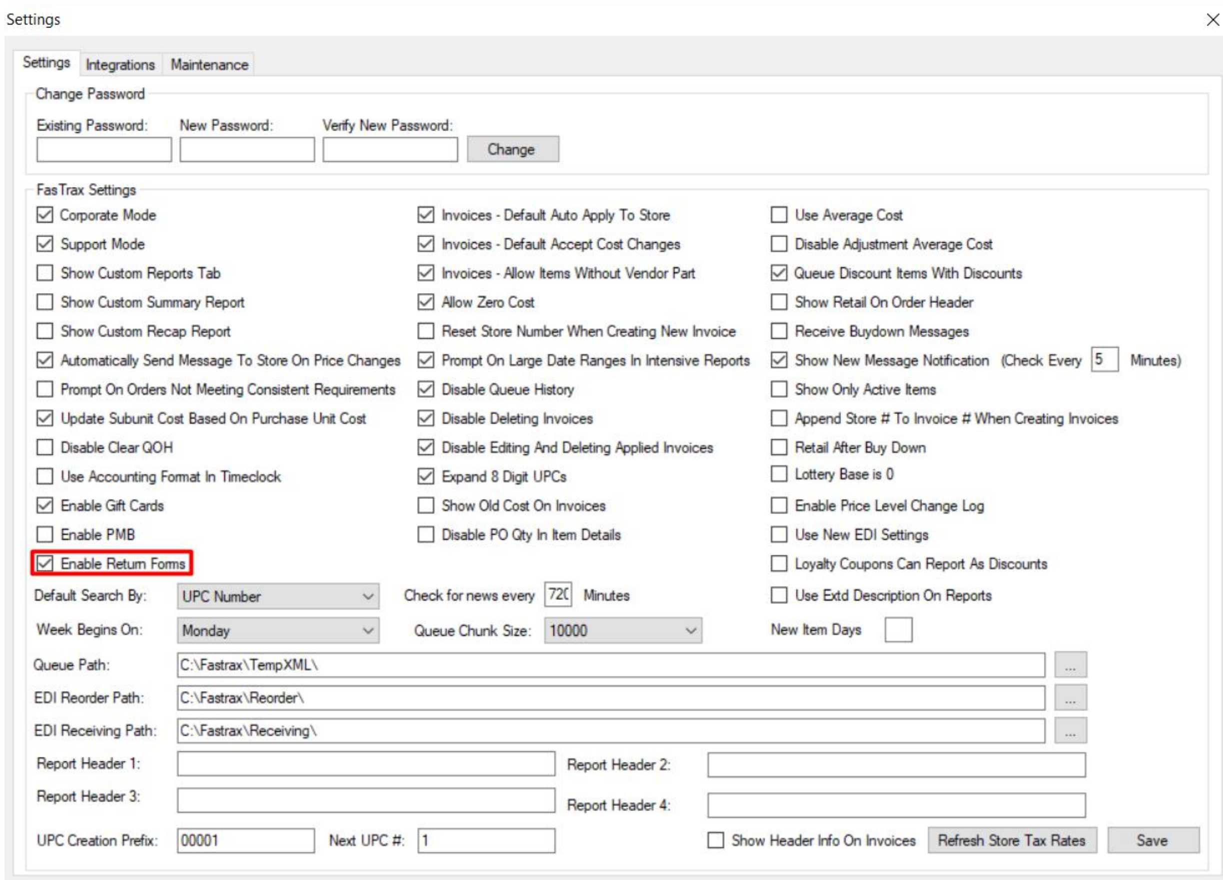
By using the option of return forms in both the POS and Director, keeping tabs of specific customer returns is no problem. All returns are recorded with detailed transactional and customer data: name, address, phone, license number, product(s) returned, dollars returned, location returned, and total lifetime returns.



Enabling Return Forms in Director

1. From within Director, choose the settings hyperlink in the bottom right corner

2. In the settings window, make sure the checkbox is checked to “Enable Return Forms”

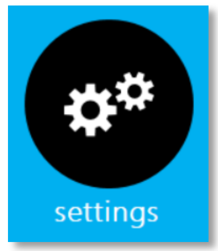


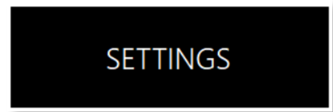
3. Choose the “Save” button

Enabling Return Forms in POS

1. From within the POS after logging in, choose the “Actions” button

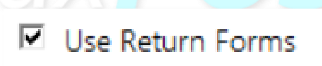
2. Then choose the “Settings” button, followed by the second “Settings” button



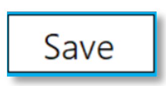


3. Next, choose the “Register Settings” tab

4. Choose the checkbox “Use Return Forms”

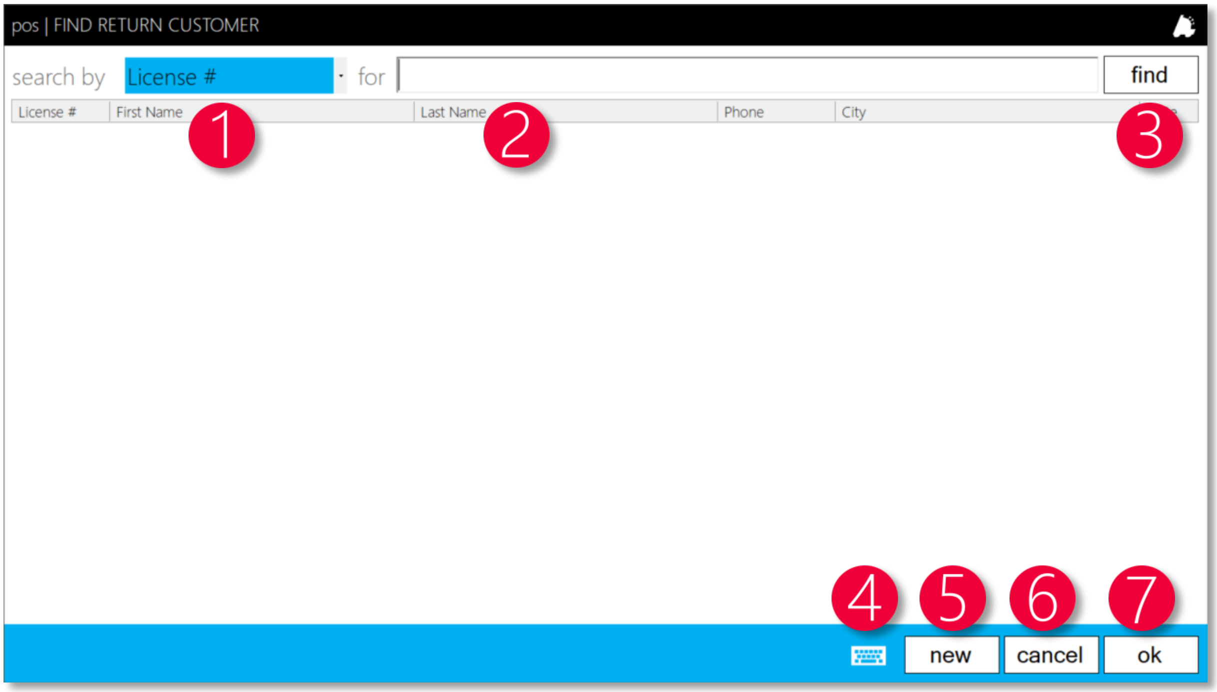


5. Finally, choose the “Save” button



Return Forms in POS

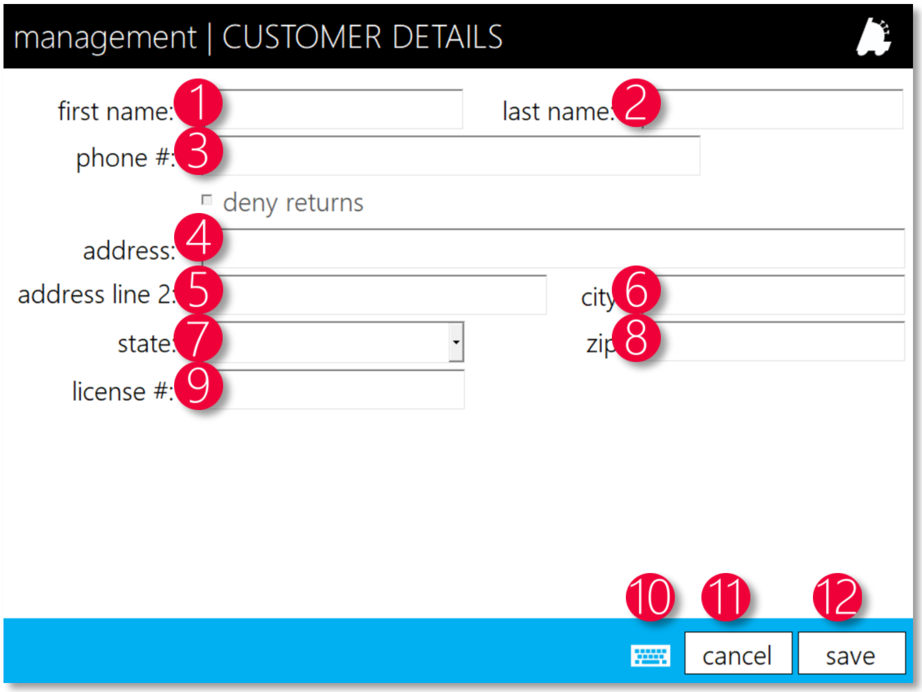
When performing a return in the POS with return forms enabled, you will receive the below screen:



This screen allows you to add a new return customer or find an existing one.

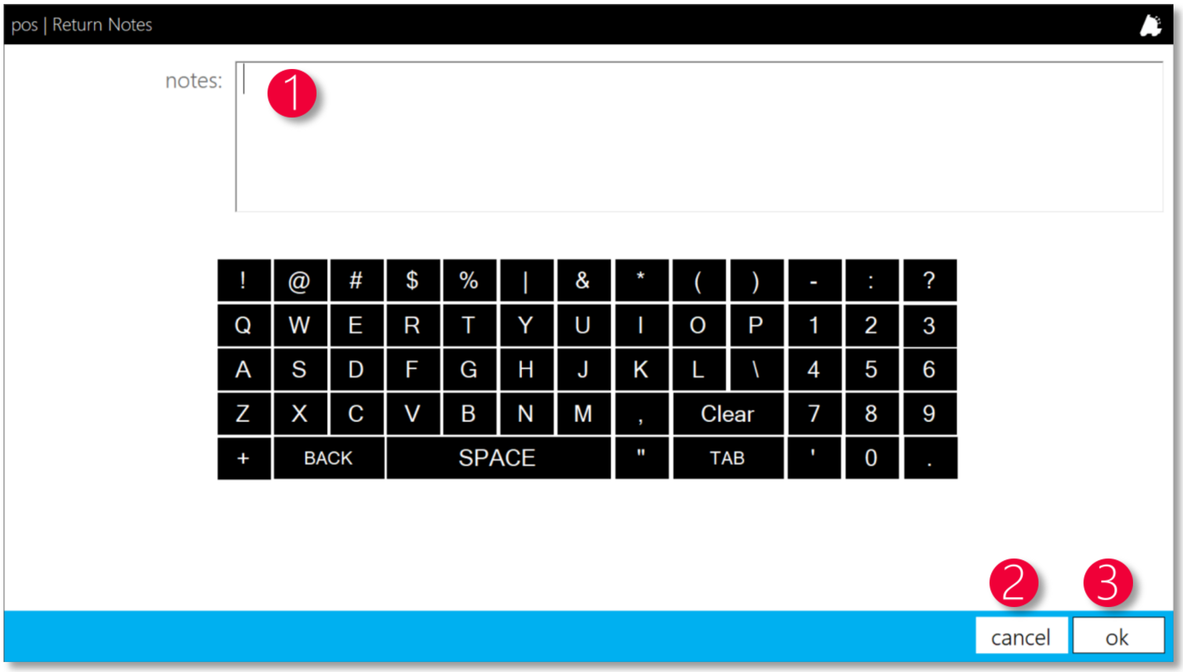
1. Search By – This dropdown allows you to search by license #, last name, or phone #
2. For – This is a text box where you input the value you want to search
3. Find – Press find to search for the value that was input in the "for text box field"
4. Keyboard – Brings up a touch friendly virtual keyboard
5. New – Allows you to input a new return customer
6. Cancel – Cancels the return process
7. Ok – After selecting the return customer, press ok to process with the return process

If pressing the "new" button to add a customer, you will be presented with the below screen:



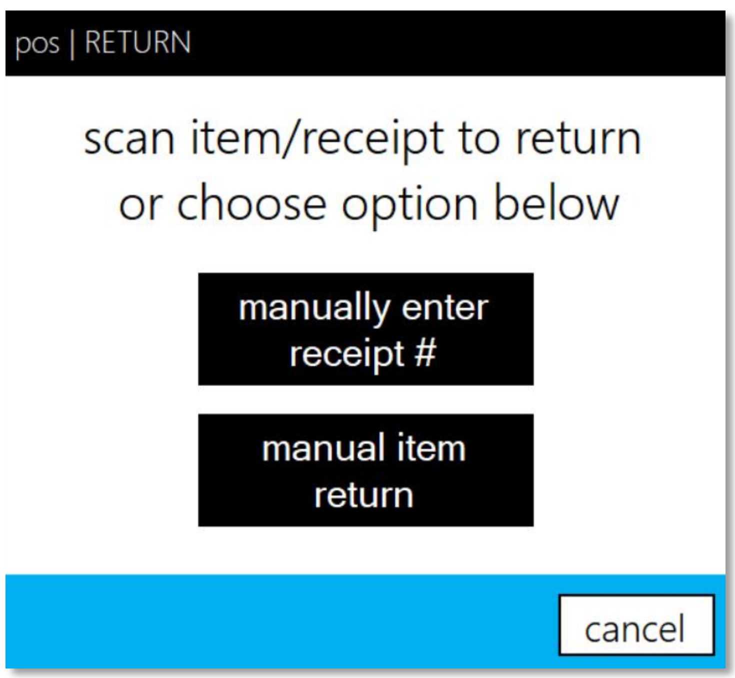
1. First Name – The customer's first name
2. Last Name - The customer's last name
3. Phone # - The customer's phone number
4. Address - The customer's address
5. Address Line 2 - The customer's address for line 2 if required
6. City - The customer's city
7. State - The customer's state
8. Zip - The customer's zip code
9. License # - The customer's driver's license number
10. Keyboard – Brings up a touch friendly virtual keyboard
11. Cancel – Cancels out of adding a new customer
12. Save – Saves the new customer

After either adding a new return customer or selecting an existing one, you next have the screen which asks for return notes.



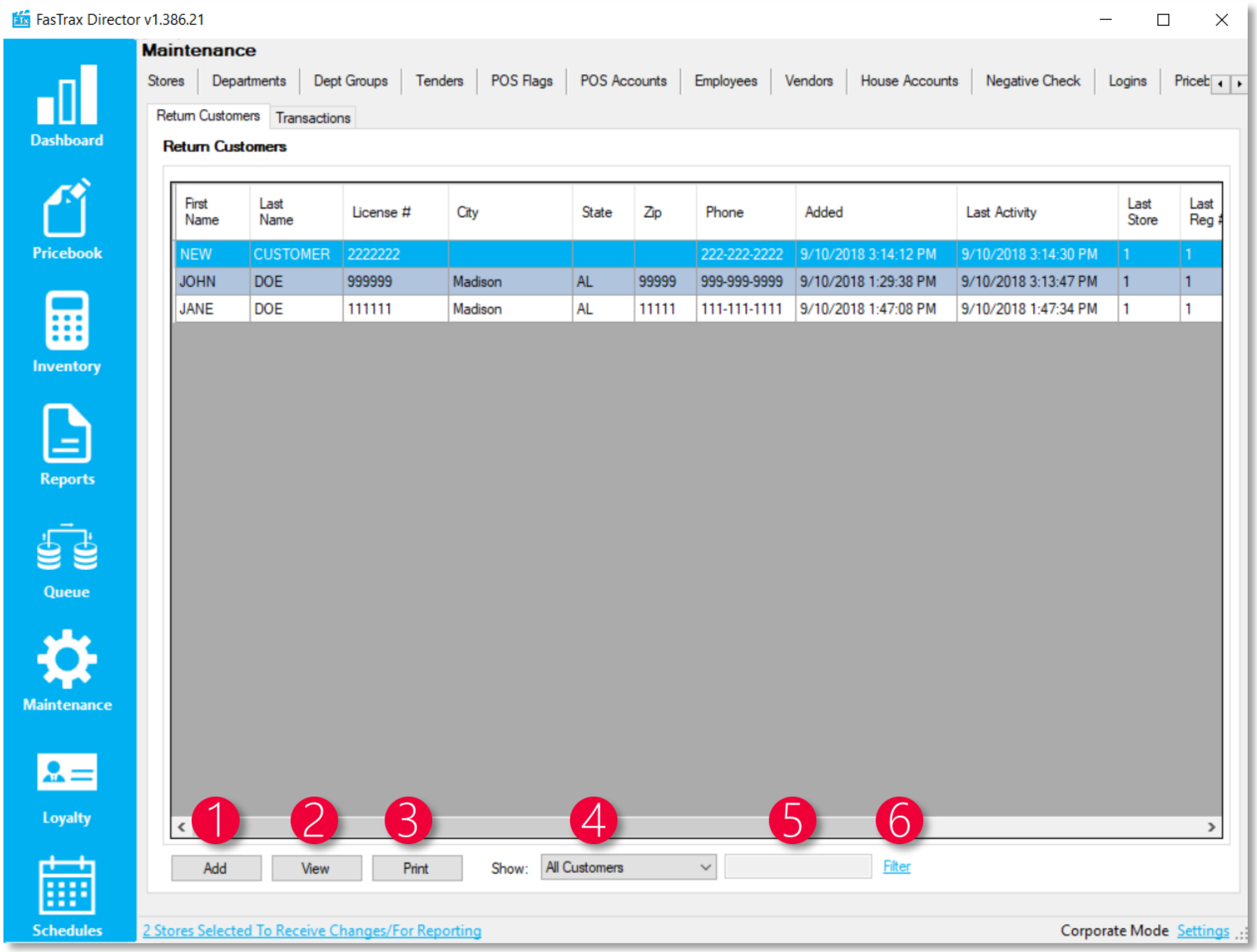
1. Notes – Enter in the reason for return
2. Cancel – Cancels the return process
3. Ok – After entering the reason for return, continues the return process

The next window is part of the standard return process: return against a receipt or manual item return



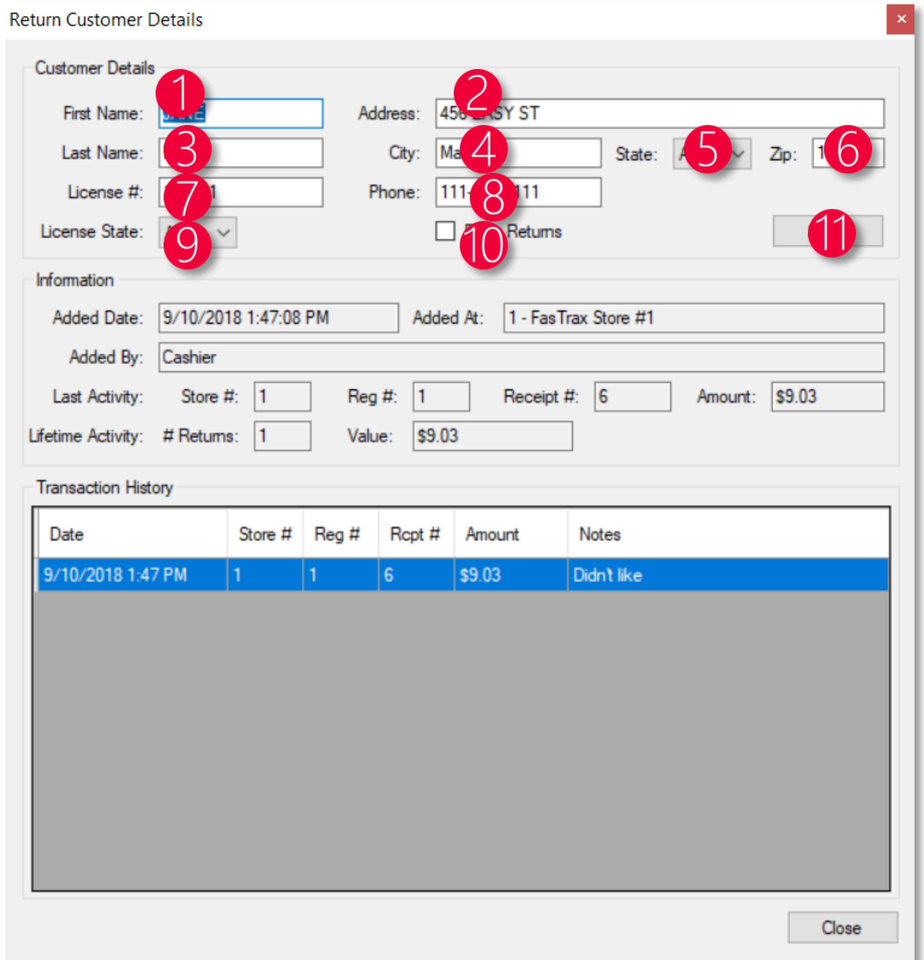
Return Forms in Director

When navigating to the return forms section in Director's maintenance module, you will be presented with the following screen:



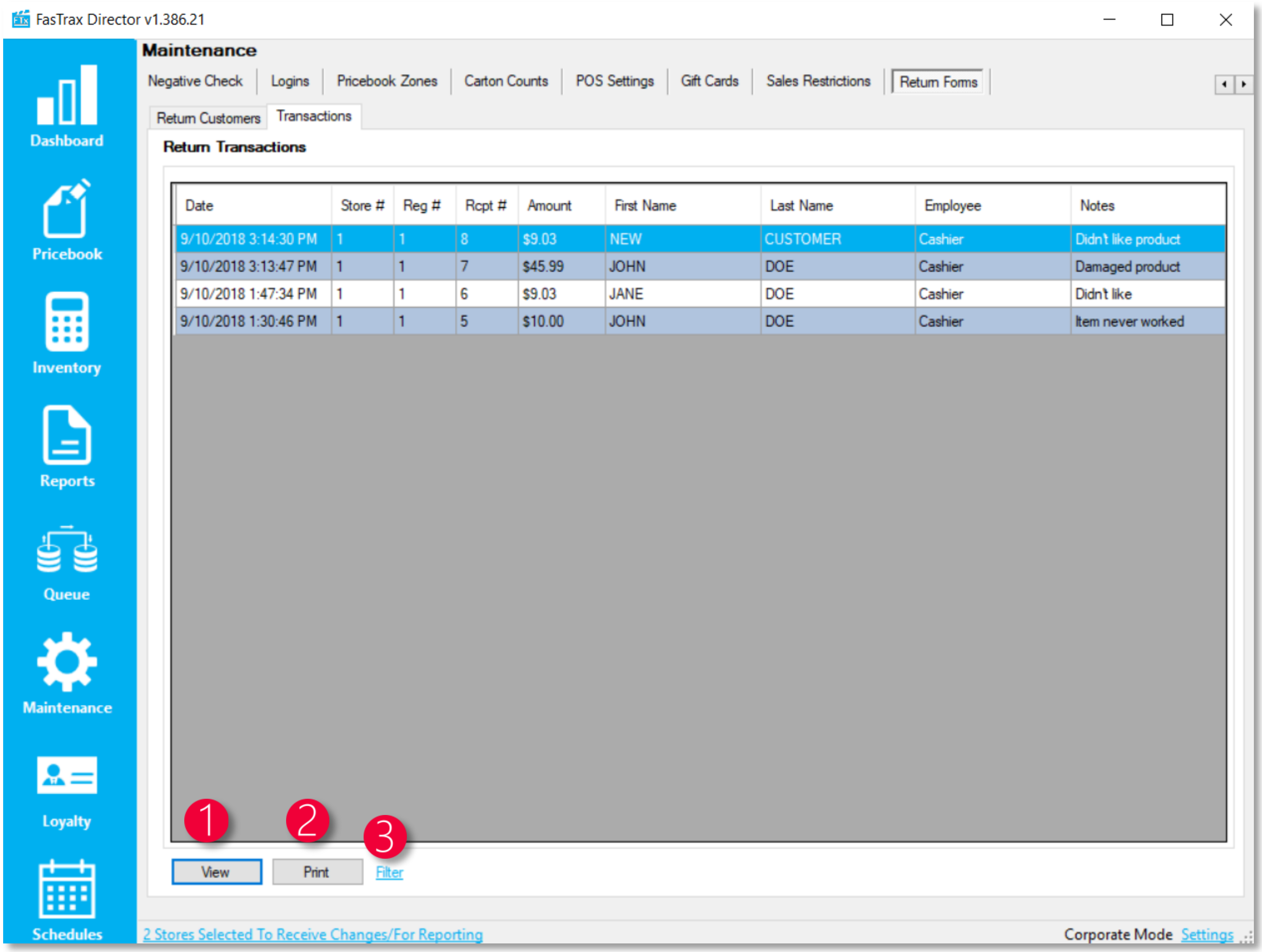
1. Add – Allows a new return customer to be added
2. View – Opens a new window to view data on a return customer that is selected in the above grid
3. Print – Prints a list of all return customers
4. Show – A filter with many options to filter specific return customers
5. Filter Text Box – Allows text to be input to filter against
6. Filter – Filters against the filter text box and show dropdown

When choosing the "Add" button or "View" button, you are presented the below window:



1. First Name – The customer's first name
2. Address – The customer's address
3. Last Name – The customer's last name
4. City – The customer's city
5. State – The customer's state
6. Zip – The customer's zip code
7. License # - The customer's driver's license
8. Phone – The customer's phone number
9. License State – The state of the driver's license
10. Deny Returns – When flagged, returns from the customer are now rejected
11. Save – Saves the customer details

When choosing the "Transactions" tab, you will see the below screen. This allows you to see return transactions, customers who made the return, and print out the list.



1. View – Creates a report for the highlighted row and shows details of the transaction
2. Print – Prints the entire grid of transactions
3. Filter – Allows you to filter the grid of specific transactions