

Processing Customer Refunds

Guidelines

Always attempt to refund back to the customer to the SAME form of payment that was taken on the original purchase. If this is not possible, follow instructions below to request a Corporate refund check through your Regional office.

Refunding customer purchase

Follow these steps to process a refund back to your customer in the POS:

Step	Action
1	Find the customer In the POS: 1. Click Invoice Sales 2. Click Customer Inquiry 3. Search for the customer's account
2	Find the invoice to refund: 1. Highlight the customer's account and click Customer History 2. Click the Invoices tab 3. Highlight the invoice to be refunded and click Select
3	Refund: 1. Click the Refund button 2. Enter Salesman number 3. If needed, modify the invoice to reflect any and all items being refunded 4. Click Next 5. Make sure the correct refund amount is entered next to the correct payment type in the Final Payment screen 6. Click Transaction Final

Refund Checks

Request a refund check **ONLY** when the store cannot refund the customer via the standard refund process. This may occur when:

- Customer paid with cash and the store doesn't have enough cash in the till to process the refund.
- Customer paid with a check and policy is to wait 14 days from original purchase to ensure that the check has cleared the bank prior to refunding the customer via Corporate check.
- Customer no longer has the original credit card that was used on the original purchase, so we can't refund the original form of payment. (rare)

The Corporate office issues refund checks to customers at the request of the Regional office. Proper paperwork is required before refund checks can be issued. Returned merchandise must be correctly entered back into stock to ensure the accuracy of store inventory.

There are three types of refunds: returned product, layaway refunds and customer satisfaction refunds.

Processing request for a Corporate refund

Follow these steps to process a request for Corporate refund for:

RETURNED PRODUCT

Upon receipt of returned merchandise:

Step	Action						
1	Update inventory as follows:						
	<table><tr><th>If ...</th><th>Then ...</th></tr><tr><td>The tires are coming back into inventory,</td><td><ol style="list-style-type: none">1. On the F3 Detail Items tab, include comment details (reason for return)2. On the F6 Payment tab, set Negative Invoice Payments to “CASH” and finalize the transaction to show the merchandise coming back into inventory at the refund value.3. Ensure the pricing matches what the customer paid.</td></tr><tr><td>The tires have been driven on,</td><td>Complete an Inventory Adjustment Form for your Regional office to remove product from your inventory.</td></tr></table>	If ...	Then ...	The tires are coming back into inventory,	<ol style="list-style-type: none">1. On the F3 Detail Items tab, include comment details (reason for return)2. On the F6 Payment tab, set Negative Invoice Payments to “CASH” and finalize the transaction to show the merchandise coming back into inventory at the refund value.3. Ensure the pricing matches what the customer paid.	The tires have been driven on,	Complete an Inventory Adjustment Form for your Regional office to remove product from your inventory.
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2	<ol style="list-style-type: none">1. Create a Cash Receipt Voucher – “Other” to offset the Cash going out of the store on the invoice.2. Add the following information on the comment line: Customer name, refund check from Corp.						
3	Fax a copy of the original invoice to the Regional office so a refund check can be requested.						

LAYAWAY REFUNDS

To request a refund of a layaway deposit:

Step	Action
1	<ol style="list-style-type: none"> Obtain the original invoice of deposit from the customer. Using the Layaway Balance list select the layaway and click Refund Layaway. Fill out the Payment screen and select Transaction Final.
2	Do a Layaway Refund NO SALE.
3	Create a CRV (Cash Receipt Voucher) for the amount of the refund check and add the following information on the comment line: Customer name, refund check from Corp.
4	Fax a copy of the original invoice to the Regional office so a refund check can be requested.

CUSTOMER SATISFACTION REFUNDS

To request a refund without returned merchandise:

Step	Action
1	Notify the Regional office that this is a Customer Satisfaction refund.
2	Fax a copy of the original invoice to the Regional office so a refund check can be requested.

Contact

Please contact your Regional office with any questions or concerns.