

Returns Management

Customer Services

Sparkstone Technology Ltd



Introduction

This document outlines the workflow for configuring returns management and advising how it can be used within the Sparkstone Retail EPOS System. These notes are designed to complement the training that you will have received on the Sparkstone Retail EPOS from a Sparkstone training consultant or system administrator. They are not intended to be a complete overview of the software but are designed to assist you at a later stage when you are away from the training session.

These notes have been compiled to reflect the configuration of the Sparkstone EPOS system at your site and as such may only contain information pertinent to the operations that you require. If additional modules are purchased at a later date, training notes will be provided as appropriate on completion of the associated training course.

Objectives

To provide an overview of the involved in configuring returns management.

Conventions Used

Menu paths will be indicated throughout this training manual in bold.

For example:

Back Office | Product file | Stock Records

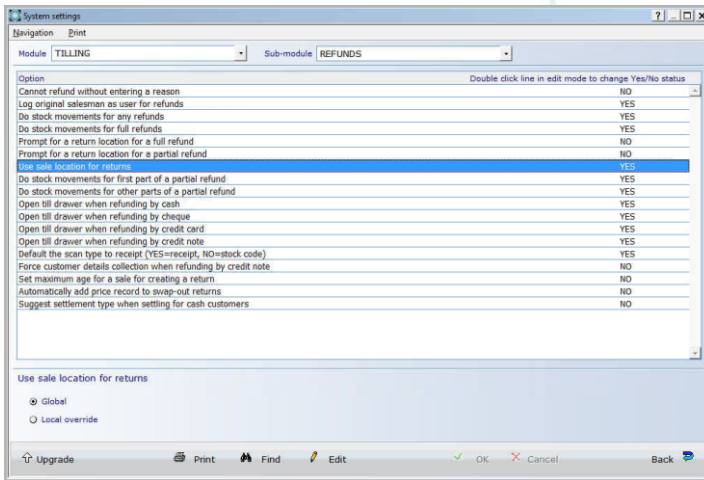
Indicates that you should access Stock Records window from the Back Office using the Product File on the drop down navigation menu.

Configuring Returns Management

To start with, there needs to be a returns location setup. One of consultants will need to set this up for you.

Additionally, the global settings need to be configured accordingly:

Go to **System Control | System Configuration | Global Settings | Find** and type in 'sale location' and select from the list 'Use sale location for returns'. This will be defaulted to YES.

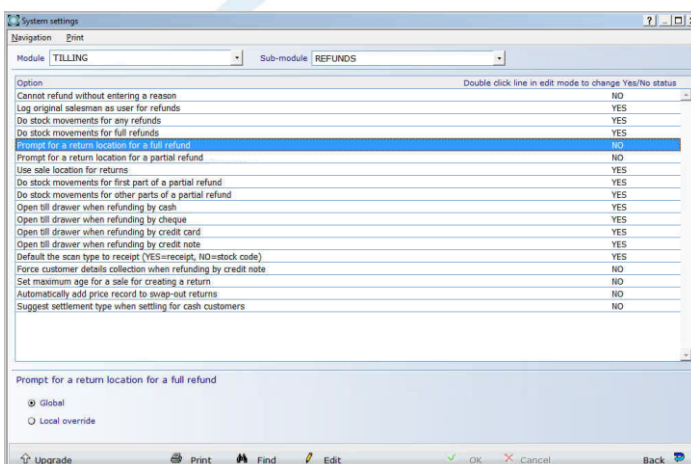


Press 'edit' and double click the line on selected and the YES on the right will change to NO.

Then select 'OK' to save down the change. This will change the location for returns to be set to the one that has been configured in the site window, rather than the sales location.

An additional global setting can be configured so that a prompt is displayed when a return is processed in the tilling screen, and a location can be chosen at that point of where the stock can be sent back to.

Go to Find and type in 'return location' and select from the list 'Prompt for a return location for a full refund'. This will be defaulted to NO.



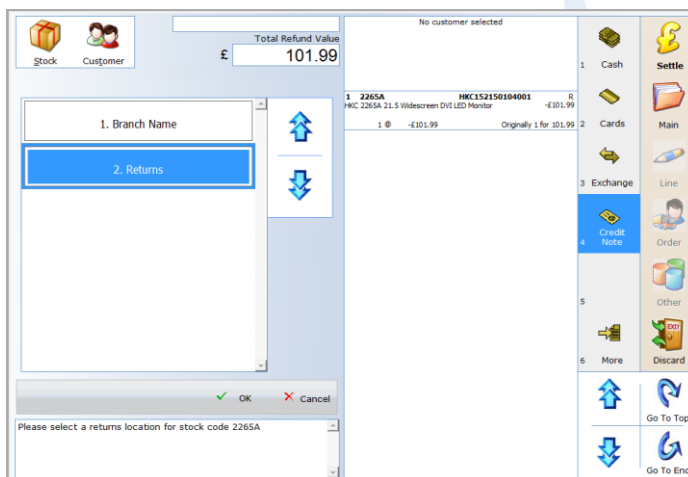
Press 'edit' and double click the line on selected and the NO on the right will change to YES. Select 'OK' to save down the change.

Processing Returns

Sign in to the front end tilling screen as normal, select 'Refunds' from the tilling menu on the right hand side, then toggle between 'scan receipts' or 'scan stock codes' to determine which option to input the refund.

To type in the stock code, select 'scan stock codes' and the flag will change to move to that selection. Type or scan the stock item to return at the bar at the top of the screen.

Then enter the reason for the refund on the left hand side. Choose the type of settlement for the refund by going to Settle > Select the mode of settlement e.g. credit note. At this point, the location can be chosen to determine where the stock goes back to:



In this case, I'm going to select 'Returns' which will put it into Returns Management. Then a prompt will be shown to remind you to give the credit note to the customer, after it has been printed out. Press OK to this.

After this, the stock can be processed in the Returns Management screen.

Go to the **Back Office | Stock Movements | Returns Management** and the following window will open:

The screenshot shows the 'Returns Management' window with a table containing one row of data:

Supplier Code	Stock Code	Matrix Code	Qty	Branch	Date	Description	Customer	Refund	Sales Order	Orig. Order	RMA #	Type
	2265A	(n/a)	1	HO	27 MAY 15 11:59	HKC 2265A 21.5 Widescreen		10004394				SR

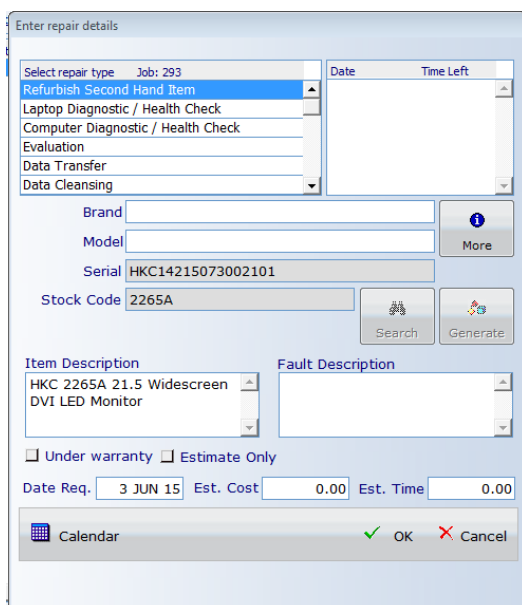
From here, there are several scenarios that exist to deal with returned goods.

It can be restocked- placing the item back into stock, if the goods are faulty then they can be returned to the supplier or the stock could be written off.

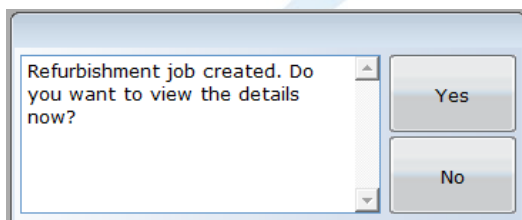
Selecting 'Restock' will move the entry from the 'returns location' to the 'sales location' and this adjusts the stock records by the amount returned at the branch that the stock item was returned to.

If 'Return to Supplier' is selected then a GRN will be printed. If 'Write Off' is selected then a stock adjustment report is printed.

Additionally, it can be sent to the workshop to be repaired, by clicking 'Send to Workshop' and the following window will be displayed:



Select the repair type and enter the details and press OK, this will create a new job in the workshop job window. The following prompt will be displayed:



Pressing 'YES' will open the Workshop management window. The repair job can then be processed as normal from here.