

# How-To Guide Configuring Return Reasons

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# Introduction

The purpose of this guide is to provide a foundational understanding of the options and capabilities available when configuring Return Reasons. Return Reasons mainly consist of Item Return, Receipt Return, Item Exchange, MMG Return, and Non-Merchandise Return. Reasons are configured based on a Reason Type and are associated with a Region in which they are applicable.

The properties of a Reason configuration too depend on the Reason Type. Return Reasons are Reasons for which either a particular item or Receipt is enabled return following checkout. This guide provides the basic step-by-step configurations required to set up the necessary Return Reasons.

## Overview

This guide will cover the configuration for the following:

- **Item Return** – Allows return of a particular item in a transaction.
- **Receipt Return** – Allows return of the entire receipt.
- **Item Exchange** – Allows exchange of a particular item in a transaction.
- **MMG Return** – Allows return of an item from a department sale.
- **Non-Merchandise Return** – Allows return of a non-merchandise item.

## Prior Training / Experience

You should be familiar with the following:

- Estate Manager Configuration
- Data Broadcasting

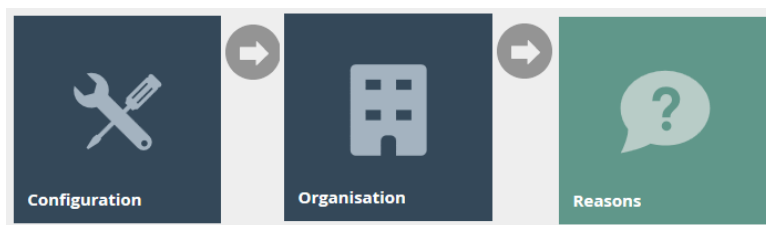
# Configuration Steps

Reasons are created based on a pre-defined **Reason Type** and associated with a Region in which they are applicable. Each Reason Type is known to a specific function of the application, that is required to capture reasons of the specific type. Many of the Reason Types relate to Application-Specific built-in functionality.

## Item Return

Item Return Reason allows setting the option to return a particular item in a transaction. This governs how manual returns (also referred to as Non-receipt Returns) are handled at the POS. Generally, an Item Return Reason can directly impact Tenders and Inventory.

The reason maintenance application can be accessed through:  
Configuration -> Organisation -> Reasons



Reason Maintenance

Region:  Reason Type:  Reason ID:

Apply Filters Reset Filters

	Reason ID	Reason Type	Region	Reason Start Date	Reason End Date	Description
	IR-UK-01	Item Return	United Kingdom			Damaged / Faulty
	IR-US-01	Item Return	United States			Damaged / Faulty
	IR-UK-04	Item Return	United Kingdom			Damaged / Faulty - witness capture
	IR-US-03	Item Return	United States			Managers Discretion
	IR-UK-03	Item Return	United Kingdom			Managers Discretion
	IR-US-02	Item Return	United States			Not Wanted (10 Days) (Credit Note)

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[+ Create a new Reason](#)

To create a new Reason, select **Create a New Reason** on the Reason Maintenance page.

Select the appropriate Region from the **Region** drop-down.

Select **Item Return** from the **Reason Type** drop-down.

Enter a unique **Reason ID** for the new Item Discount Reason. The ID can be alphanumeric and contain a maximum of 20 characters.

## Reason Maintenance

You are adding a new Reason, please select the Region and Reason Type and enter an ID:

Region	United Kingdom
Reason Type	Item Return
Reason ID	IR-001

[← Back](#) [+ Create](#)

You will be presented with the following options to complete creating the new Item Return Reason:

### Reason – General Tab

The General tab has all the basic information that captures the identity of the Item Return Reason.

## Reason Maintenance

[Save](#) [Cancel](#)

You are editing Item Return Reason ID: 'IR-UK-01' for region 'United Kingdom'

General	Return	Return Price	Applicable Tenders	Transaction Types	Witness
---------	--------	--------------	--------------------	-------------------	---------

Description*	Damaged / Faulty	English (UK)
Function Authorisation Code	-	
Capture Reference Number?	<input type="checkbox"/>	
Capture Customer Name and Address?	<input type="checkbox"/>	
Parent Reason ID	-	
Reason Start Date		
Reason End Date		

\* Denotes Mandatory

Set the appropriate values on the **General** tab as follows:

Configuration	Description
Description	Enter a user-friendly, meaningful description for the Reason that can be alphanumeric with a maximum of 50 characters.
	Select the locale from the dropdown list of all configured Locales.
Function Authorisation Code	Select the applicable Function Authorisation Code from the drop-down list. These are defined and configured in Role Maintenance and applicable only if the reason selection requires authorisation.

Capture Reference Number	Select check box, if the User should be prompted to enter a reference number when using this Reason.
Capture Customer Name and Address	Select check box, if the User should be prompted to capture the Customer's Name and Address when using this Reason.
Parent Reason ID	If the reason requires a parent reason, select the relevant parent reason from the drop-down list of all configured Reasons of the same Reason Type.
Reason Start Date	Enter a Reason Start Date
Reason End Date	Enter a Reason End Date

## Reason – Return Tab

The Return tab provides a comprehensive list of properties available for configuration of the specific Item Return Reason that define permissible options and handling of Returns.

Reason Maintenance

Save
Cancel

You are editing Item Return Reason ID: 'IR-UK-01' for region 'United Kingdom'

General
Return
Return Price
Applicable Tenders
Transaction Types
Witness

Effect on Inventory\*
Damaged

Capture Original Tender?
☐

Capture Original Tax Region?
☐

Requires Witness?
☐

Return within Days Limit
0
(Zero means unlimited)

Capture Return Information?
☐

Raise Alert?
☐

Print Signature Slip?
☒

Number of Copy Receipts
1

Offer Return Slip
☐

\* Denotes Mandatory

Set the appropriate values on the **Return** tab as follows:



Configuration	Description
Effect On Inventory	Select an appropriate type from all configured Inventory Types that will determine the effect on inventory property when using this Reason.
Capture Original Tender?	Select the checkbox if the User must be prompted to capture the original tender details when using this Reason.
Capture Original Tax Region?	Select the checkbox if the User must be prompted to capture the original Tax Region when using this Reason.

Requires Witness?	Select the checkbox to indicate if the User must obtain a witness when using this Reason.
Return within Days Limit	Enter a numeric value ranging from 0-365 which will determine the period within which an item may be returned with this Reason. Setting the value to 0 determines, an unlimited number of days is applicable.
Capture Return Information?	Select the checkbox if the User must be prompted to capture any required return information when using this Reason.
Raise Alert?	Select the checkbox if an alert must be raised when this Reason is used.
Print Signature Slip?	Select the checkbox if a customer signature slip will be printed when this Reason is used.
Number of Copy Receipts	Enter a numeric value ranging from 0-5 which will determine the number of extra receipts to be printed when this Reason is used.
Offer Return Slip	Select the checkbox if the User must be prompted to offer a product return slip when using this Reason.

## Reason – Return Price Tab

The Return Price tab provides properties that capture components relating to the return price of the Item Return Reason.

Reason Maintenance

 Save
  Cancel

You are editing Item Return Reason ID: 'IR-UK-01' for region 'United Kingdom'

General	Return	<b>Return Price</b>	Applicable Tenders	Transaction Types	Witness
---------	--------	---------------------	--------------------	-------------------	---------

Force price entry ☐

Enable Lowest Return Price Lookup ☐

Set the appropriate values on the **Return Price** tab as follows:

Configuration	Description
Force Price Entry	Select the checkbox if the User is enabled to force a price entry that is different to the price shown when using this Reason.
Enable Lowest Return Price Lookup	Select the checkbox if the User is enabled to lookup the lowest Return price of a product when using this Reason.

## Reason – Applicable Tenders Tab

The Applicable Tenders Tab is available for Reason Types that contains a Tenders dependency when using the Reason. This Reason will be available for the operator to select only if the Tender of the Transaction permits.

Reason Maintenance

Save

Cancel

You are editing Item Return Reason ID: 'IR-UK-01' for region 'United Kingdom'

General

Return

Return Price

Applicable Tenders

Transaction Types

Witness

Please select the applicable Tenders:

Cards PDQ UK	United Kingdom	<input type="checkbox"/>
Cards UK	United Kingdom	<input type="checkbox"/>
Cash	All Regions	<input type="checkbox"/>
Cash UK	United Kingdom	<input type="checkbox"/>
Cheques UK	United Kingdom	<input type="checkbox"/>
Credit Note UK	United Kingdom	<input type="checkbox"/>
Customer Account UK	United Kingdom	<input type="checkbox"/>
Employee Account UK	United Kingdom	<input type="checkbox"/>
Gift Card UK UK	United Kingdom	<input type="checkbox"/>
Loyalty Account UK	United Kingdom	<input type="checkbox"/>
Voucher UK	United Kingdom	<input type="checkbox"/>

All Tenders that may be applicable to this Reason Type are listed with a Checkbox. Select the desired tender type(s) to indicate the operator the applicable tender type(s) when using this Reason.

## Reason – Transaction Types Tab

The Transaction Types tab is available for Reasons which are only valid for certain transaction types (Eg: Restaurant sale transaction). All Transaction Types for this Reason can be selected here and if no transaction types are selected, it is assumed that the Reason is valid for all.

Reason Maintenance

Save

Cancel

You are editing Item Return Reason ID: 'IR-UK-01' for region 'United Kingdom'

General

Return

Return Price

Applicable Tenders

Transaction Types

Witness

Please select the applicable Transactions types:

Airport Sale Transaction	<input type="checkbox"/>
Employee Retail Sale Transaction	<input type="checkbox"/>
Normal Retail Sale Transaction	<input type="checkbox"/>
Restaurant Employee Sale Transaction	<input type="checkbox"/>
Restaurant Sale Transaction	<input type="checkbox"/>



## Reason – Witness Tab

The Witness tab is available for Reasons which require the User to obtain a witness when using this Reason. If checked, the user will be prompted for a witness whenever the Reason is selected.

The screenshot shows the 'Reason Maintenance' interface. At the top, there's a green header bar with the title 'Reason Maintenance'. Below it, there are 'Save' and 'Cancel' buttons. A message states: 'You are editing Item Return Reason ID: 'IR-UK-01' for region 'United Kingdom''. Below this is a tabbed interface with tabs for 'General', 'Return', 'Return Price', 'Applicable Tenders', 'Transaction Types', and 'Witness'. The 'Witness' tab is selected and highlighted with a red box. Inside the 'Witness' tab, there are four configuration fields: 'Capture Witness' with a checked checkbox, 'Witness User Function Authorisation Code' with a dropdown menu showing '-', 'Witness Skip Function Authorisation Code' with a dropdown menu showing '-', and 'Capture Witness Rate' with a text input field containing '100%'.

If checked, additional configuration options will appear. Set appropriate values on the fields as follows:

Configuration	Description
Witness User Function Authorisation Code	Select from the drop-down list to determine this as a <b>Manager Authorised Functions</b> .
Witness Skip Function Authorisation Code	Select from the drop-down list to determine this as a <b>Manager Authorised Functions</b> .
Capture Witness Rate	Enter a numeric value to define a percentage for the capture witness rate. (Indicates the percentage that the user should be prompted to capture witness; against the number of times this reason is used)

Select **Save** to complete creating the Item Return Reason.

\* Multiple Reasons can be created for the Item Return Reason Type as required. These Reasons will be presented to the operator to select from when performing an Item Return.

## Receipt Return

Receipt Return Reason allows setting the option to return one or more items in a transaction. Both Item Return and Receipt Return Reason Types capture the same properties in the same set of Tabs of their Reason Maintenance pages except for the differences in the properties captured in the Return Tab. Receipt Return Reason can also directly impact Tenders and Inventory.

To create a new Reason, select **Create a New Reason** on the Reason Maintenance page.

Select the Region from the **Region** drop-down.

Select **Receipt Return** from the **Reason Type** drop-down.

Enter a unique **Reason ID** for the new Item Discount Reason. The ID can be alphanumeric and contain a maximum of 20 characters.

**Reason Maintenance**

You are adding a new Reason, please select the Region and Reason Type and enter an ID:

<b>Region</b>	All Regions
<b>Reason Type</b>	Receipt Return
<b>Reason ID</b>	RR-001

[← Back](#) [+ Create](#)

You will be presented with the following options to complete creating the new Receipt Return Reason:

**Reason Maintenance**

[Save](#) [Cancel](#)

You are editing Receipt Return Reason ID: 'RR-UK-01' for region 'United Kingdom'

<b>General</b>	Return	Return Price	Applicable Tenders	Transaction Types	Witness
----------------	--------	--------------	--------------------	-------------------	---------

**Description\*** Damaged / Faulty (30 Days) English (UK)

**Function Authorisation Code** -

**Capture Reference Number?** ☐

**Capture Customer Name and Address?** ☐

**Parent Reason ID** -

**Reason Start Date**

**Reason End Date**

\* Denotes Mandatory

## Reason – General Tab

The General tab has all the basic information that captures the identity of the Receipt Return Reason.

Set the appropriate values on the **General Tab** as per the sample on configuring Item Return reason.

## Reason – Applicable Tenders Tab

The Applicable Tenders Tab is available for Reason Types that contains a Tenders dependency when using the Reason. This Reason will be available for the operator to select only if the Tender of the Transaction permits.

Set the appropriate values on the **Applicable Tenders Tab** as per the sample on configuring Item Return reason.

## Reason – Transaction Types Tab

The Transaction Types tab is available for Reasons which are only valid for certain transaction. All Transaction Types for this Reason can be selected here and if no transaction types are selected, it is assumed that the Reason is valid for all.

## Reason – Witness Tab

The Witness tab is available for Reasons which require the User to obtain a witness when using this Reason. If checked, this option is made active for this Reason.

Set the appropriate values on the **Witness Tab** as per the sample on configuring Item Return reason.

## Reason – Return Tab

The Return tab provides a comprehensive list of properties available for configuration of the specific Receipt Return Reason that define permissible options and handling of Returns.

Reason Maintenance

Save

Cancel

You are editing Receipt Return Reason ID: 'RR-UK-01' for region 'United Kingdom'

General

Return

Return Price

Applicable Tenders

Transaction Types

Witness

Effect on Inventory\*

Damaged

Requires Witness?

☐

Return within Days Limit

30

(Zero means unlimited)

Minimum Return Days Limit

0

(Zero means unlimited)

Capture Return Information?

☐

Raise Alert?

☐

Print Signature Slip?

☒

Number of Copy Receipts

1

Offer Return Slip

☒

Don't force original Tenders during return

☐

\* Denotes Mandatory



Set the appropriate values on the **Return** tab as follows:

Configuration	Description
Effect On Inventory	Select an appropriate type from all configured Inventory Types that will determine the effect on inventory property when using this Reason.
Requires Witness?	Select the checkbox to indicate if the User must obtain a witness when using this Reason.
Return within Days Limit	Enter a numeric value ranging from 0-365 which will determine the period within which an item may be returned with this Reason. Setting the value to 0 determines, an unlimited number of days is applicable.
Minimum Return Days Limit	Enter a numeric value ranging from 0-365 which will determine the minimum period within which an item may be returned with this Reason. Setting the value to 0 determines, an unlimited number of days is applicable.
Capture Return Information?	Select the checkbox if the User must be prompted to capture any required return information when using this Reason.
Raise Alert?	Select the checkbox if an alert must be raised when this Reason is used.
Print Signature Slip?	Select the checkbox if a customer signature slip will be printed when this Reason is used.
Number of Copy Receipts	Enter a numeric value ranging from 0-5 which will determine the number of extra receipts to be printed when this Reason is used.
Offer Return Slip	Select the checkbox if the User must be prompted to offer a product return slip when using this Reason.
Don't force original Tenders during return	Select the checkbox if the User must be prompted to force the original tender when using this Reason. (i.e. One of the applicable tenders selected in the Applicable Tenders Tab can be used in this instance)

## Reason – Return Price Tab

The Return Price tab only captures the **Force Price Entry** property when configuring Item Return Reason. Select the checkbox if the User is enabled to force a price entry that is different to the price shown when using this Reason.

Reason Maintenance

 Save
  Cancel

You are editing Receipt Return Reason ID: 'RR-UK-01' for region 'United Kingdom'

General
 Return
 **Return Price**
 Applicable Tenders
 Transaction Types
 Witness

Force price entry ☐

Select **Save**.

\* Multiple Reasons can be created for the Receipt Return Reason Type as required. These Reasons will be presented to the operator to select from when performing a Receipt Return.

## Item Exchange

Item Exchange Reason allows setting the option to exchange an item for another one of the same item type. Both Item Return and Item Exchange Reason Types capture the same properties in the same set of Tabs of their Reason Maintenance pages.

To create a new Reason, select **Create a New Reason** on the Reason Maintenance page.

Select the Region from the **Region** drop-down.

Select **Item Exchange** from the **Reason Type** drop-down.

Enter a unique **Reason ID** for the new Item Discount Reason. The ID can be alphanumeric and contain a maximum of 20 characters.

**Reason Maintenance**

You are adding a new Reason, please select the Region and Reason Type and enter an ID:

**Region**

All Regions

**Reason Type**

Item Exchange

**Reason ID**

IE-001

← Back

+ Create

You will be presented with the following options to complete creating the new Item Exchange Reason:

**Reason Maintenance**

Save

Cancel

You are editing Item Exchange Reason ID: 'IE-001' for region 'All Regions'

General

Return

Return Price

Applicable Tenders

Witness

**Description\***

Wrong Size

English (UK)

**Function Authorisation Code**

-

**Capture Reference Number?**

☐

**Capture Customer Name and Address?**

☐

**Parent Reason ID**

-

**Reason Start Date**

...

**Reason End Date**

...

\* Denotes Mandatory

### Reason – General Tab

The General tab has all the basic information that captures the identity of the Item Exchange Reason.

Set the appropriate values on the **General Tab** as per the sample on configuring Item Return reason.

### Reason – Return Tab

The Return tab provides a comprehensive list of properties available for configuration of the specific Item Exchange Reason that define permissible options and handling of Exchange Returns.

Set the appropriate values on the **Return Tab** as per the sample on configuring Item Return reason.

### Reason – Return Price Tab

The Return Price tab provides properties that capture components relating to the return price of the Item Exchange Reason.

Set the appropriate values on the **Return Price Tab** as per the sample on configuring Item Return reason.

### Reason – Applicable Tenders Tab

The Applicable Tenders Tab is available for Reason Types that contains a Tenders dependency when using the Reason. This Reason will be available for the operator to select only if the Tender of the Transaction permits.

Set the appropriate values on the **Applicable Tenders Tab** as per the sample on configuring Item Return reason.

### Reason – Witness Tab

The Witness tab is available for Reasons which require the User to obtain a witness when using this Reason. If checked, this option is made active for this Reason.

Set the appropriate values on the **Witness Tab** as per the sample on configuring Item Return reason.

Select **Save**.

\* Multiple Reasons can be created for the Item Exchange Reason Type as required. These Reasons will be presented to the operator to select from when performing a Receipt Return.

## MMG Return

MMG Return Reason allows setting the option to make a department return of an item. A department return occurs when the operator is unable to locate the return item in the POS. Through MMG Return Reason, the operator is enabled to register a price against a department to proceed with the return of the product that is not available in the POS at the time of return.

MMG Return captures the same properties as Item Return in the same set of Tabs of the Reason Maintenance page.

To create a new Reason, select **Create a New Reason** on the Reason Maintenance page.

Select the Region from the **Region** drop-down.

Select **MMG Return** from the **Reason Type** drop-down.

Enter a unique **Reason ID** for the new Item Discount Reason. The ID can be alphanumeric and contain a maximum of 20 characters.

**Reason Maintenance**

You are adding a new Reason, please select the Region and Reason Type and enter an ID:

Region	All Regions
Reason Type	MMG Return
Reason ID	MMGR-001

[← Back](#) [+ Create](#)

You will be presented with the following options to complete creating the new MMG Return Reason:

**Reason Maintenance**

[Save](#) [Cancel](#)

You are editing MMG Return Reason ID: 'MMGR-001' for region 'All Regions'

General	Return	Return Price	Applicable Tenders	Transaction Types	Witness
Description*		Item Faulty		English (UK)	
Function Authorisation Code		-			
Capture Reference Number?		<input type="checkbox"/>			
Capture Customer Name and Address?		<input type="checkbox"/>			
Parent Reason ID		-			
Reason Start Date		<input type="text"/> <input type="text"/> <input type="text"/>			
Reason End Date		<input type="text"/> <input type="text"/> <input type="text"/>			

\* Denotes Mandatory

### Reason – General Tab

The General tab has all the basic information that captures the identity of the Item Exchange Reason.

Set the appropriate values on the **General Tab** as per the sample on configuring Item Return reason.

### Reason – Return Tab

The Return tab provides a comprehensive list of properties available for configuration of the specific Item Exchange Reason that define permissible options and handling of Exchange Returns.

Set the appropriate values on the **Return Tab** as per the sample on configuring Item Return reason.

### Reason – Return Price Tab

The Return Price tab provides properties that capture components relating to the return price of the Item Exchange Reason.

Set the appropriate values on the **Return Price Tab** as per the sample on configuring Item Return reason.

### Reason – Applicable Tenders Tab

The Applicable Tenders Tab is available for Reason Types that contains a Tenders dependency when using the Reason. This Reason will be available for the operator to select only if the Tender of the Transaction permits.

Set the appropriate values on the **Applicable Tenders Tab** as per the sample on configuring Item Return reason.

### Reason – Transaction Types Tab

The Transaction Types tab is available for Reasons which are only valid for certain transaction. All Transaction Types for this Reason can be selected here and if no transaction types are selected, it is assumed that the Reason is valid for all.

### Reason – Witness Tab

The Witness tab is available for Reasons which require the User to obtain a witness when using this Reason. If checked, this option is made active for this Reason.

Set the appropriate values on the **Witness Tab** as per the sample on configuring Item Return reason.

Select **Save**.

\* Multiple Reasons can be created for the MMG Return Reason Type as required. These Reasons will be presented to the operator to select from when performing a MMG Return.



## Non Merchandise Return

Non Merchandise are products or other materials utilized in the process but are not offered for sale by the store. Non Merchandise Return Reason allows setting the option to return such items that have typically been used with priced products but are not sold such as carrier bags, hangers, equipment etc.

Non Merchandise Return captures the same properties as Item Return in the General and Transaction Types Tabs of the Reason Maintenance page.

To create a new Reason, select **Create a New Reason** on the Reason Maintenance page.

Select the Region from the **Region** drop-down.

Select **Non Merchandise Return** from the **Reason Type** drop-down.

Enter a unique **Reason ID** for the new Item Discount Reason. The ID can be alphanumeric and contain a maximum of 20 characters.

**Reason Maintenance**

You are adding a new Reason, please select the Region and Reason Type and enter an ID:

**Region**

All Regions ▼

**Reason Type**

Non Merchandise Return ▼

**Reason ID**

NMR-001

← Back

+ Create

You will be presented with the following options to complete creating the new Non Merchandise Return Reason:

**Reason Maintenance**

Save

Cancel

You are editing Non Merchandise Return Reason ID: 'NMR-001' for region 'All Regions'

General

Transaction Types

**Description\***

Not Required

English (UK) ▼

**Function Authorisation Code**

- ▼

**Capture Reference Number?**

☐

**Capture Customer Name and Address?**

☐

**Parent Reason ID**

- ▼

**Reason Start Date**

▼

...

**Reason End Date**

▼

...

\* Denotes Mandatory

## Reason – General Tab

The General tab has all the basic information that captures the identity of the Non Merchandise Return Reason.

Set the appropriate values on the **General Tab** as per the sample on configuring Item Return reason.

## Reason – Transaction Types Tab

The Transaction Types tab is available for Reasons which are only valid for certain transaction. All Transaction Types for this Reason can be selected here and if no transaction types are selected, it is assumed that the Reason is valid for all.

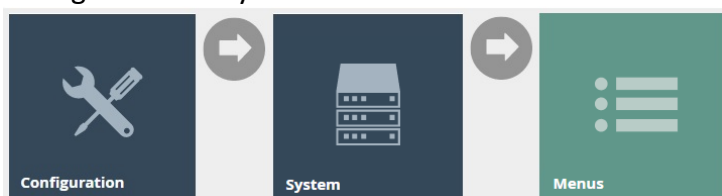
Select **Save**.

\* Multiple Reasons can be created for the Non Merchandise Return Reason Type as required. These Reasons will be presented to the operator to select from when performing a Non-Merchandise Return.

## Menus

To enable the use of the above reasons, appropriate Menus, Role and Tender privileges should be configured separately.

The menu maintenance application can be accessed through:  
Configuration -> System -> Menus



The **Sale Menu** contains most of the functions that will be required by a retailer. Most of the customization work will involve restructuring the hierarchy of the menu, removing unnecessary items, or potentially adding a new item.

A screenshot of the 'Menu Maintenance' application window. The title bar is green with the text 'Menu Maintenance' and window control icons. Below the title bar is a green header bar with 'Save' and 'Cancel' buttons. The main content area has a light gray background. At the top, it says 'You are editing menu ID SALE for menu set POS, role Sales Assistant, menu group Default Standard POS, locale English (UK)'. Below this are three form fields: 'Name' with the value 'SALE', 'Menu Type' with a dropdown menu showing 'Tree', and 'Menu Category' with a dropdown menu showing 'Retail'. Below these fields is a tree view showing the menu hierarchy. The root is 'SALE', which has several sub-items: '1 - Sales', '2 - Dept Sale', '3 - Voids', '4 - Returns', '5 - Discount / Overrides', '6 - Management', and '7 - SignOff'. At the bottom of the tree view, there are two buttons: 'Add a new Button Folder' and 'Add a new Button', both of which are highlighted with a red rectangular box.

Following are the events that can be configured for this reason menu:

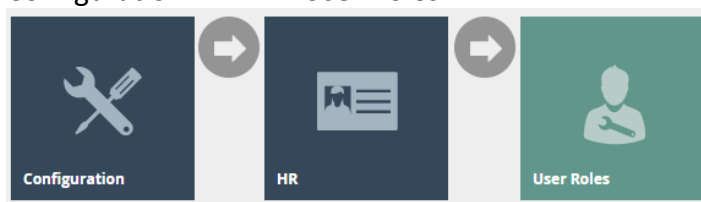
Reason Type	Event Name	Event ID
Item Return	Item Return	ItemReturn
Receipt Return	Return From Receipt	ReturnFromReceipt
Item Exchange	Item Exchange	ItemExchange
MMG Return	Return Unknown Product	ReturnUnknownProduct

\*Configuring Menus is further described in a separate How-to Guide.

## Roles

The configuration interface used to specify User Roles facilitates the selection of required permissions by applying a discovery process to the Package resources of the Enactor Retail Software itself. Named Privileges are associated with individual Functions, which assert their requirement. The required Permissions implicitly correspond to these Privileges and provide the building blocks used to construct User Roles.

The user role maintenance application can be accessed through:  
Configuration -> HR -> User Roles



Authorisation to run the specific functionality documented here are controlled with privileges maintained in roles.

Select the appropriate role you wish to edit, the example here is using SALES\_ASSISTANT.

 The screenshot shows the 'User Role Maintenance' application. At the top, it says 'You are editing user role ID: 'SALES\_ASSISTANT' for region 'All Regions''. Below this are tabs for 'General', 'Authorised Functions', 'Special Functions', and 'Report Functions'. The 'General' tab is active, showing fields for 'Application Package' (Enactor POS), 'Process' (# Return Item), 'Function ID' (Starts With), and 'Function Name' (Starts With). Below these fields are 'Apply Filters' and 'Reset Filters' buttons. A table lists functions with columns for 'Package', 'Process', 'Function ID', and 'Function Name'. The first row is 'enactor.pos.AuthorisesReturnitem' with 'Authorises Return Item'. The second row is 'enactor.pos.ReturnitemAllowed' with 'Return Item Allowed'. At the bottom, there are checkboxes for 'Enable All Displayed Functions' and 'Disable All Displayed Functions', and a footer showing 'Page 1 of 1' and 'Page Size: 10'.

Select the enactor POS package and configure the privileges as required.

Following are the privileges that can be configured for this user role:

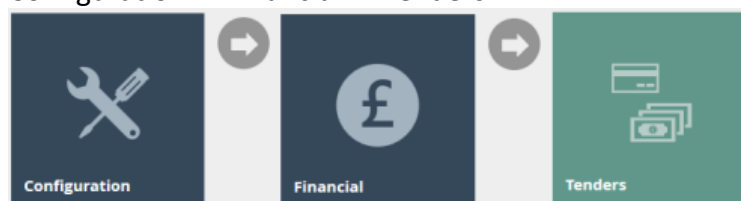
Reason Type	Package	Function ID
Item Return	Enactor POS	enactor.pos.AuthorisesReturnItem enactor.pos.ReturnItemAllowed
Receipt Return	Enactor POS	enactor.pos.AuthorisesReturnFromReceipt enactor.pos.ReturnFromReceiptAllowed
Item Exchange	Enactor POS	enactor.pos.ExchangeItemAllowed enactor.pos.AuthorisesExchangeItem
MMG Return	Enactor POS	enactor.pos.AllowUnknownProductReturn

\* Configuring User Roles is further described further in a separate How-to Guide.

## Tender

Tenders configuration provides the means to enable and control the conduct of payment options. Tender options are offered in a Menu and are associated with a specific type of tendering Process, to which they provide a specific Tenders configuration, which controls the conduct of that Process.

The user role maintenance application can be accessed through:  
Configuration -> Financial -> Tenders



Edit the appropriate tenders that should be included in the Return Reason configuration process, the example captured is using CASH\_UK tender.

## Tender – Restrictions 1 Tab

**Tender Maintenance**

Save Cancel

You are editing Tender ID 'CSH' for Region 'United Kingdom'

General Restrictions 1 Restrictions 2 Discount Restrictions Overlap Tenders User Limits Cash Management Change Surcharge Cash Tender Attributes

Debits Allowed ☒

Debit Tendering Restrictions

Debit Limit  (Zero means unlimited)

Aggregate Debit Limits ☐

Minimum Debit Amount

Credits Allowed ☒

Credit Tendering Restrictions

Credit Limit  (Zero means unlimited)

Aggregate Credit Limits ☐

Minimum Credit Amount

Force Amount Entered ☐

Prompt With Amount Due ☒

Force Use Amount Due ☐

Minimum Transaction Value

Transaction Tender Limit Check ☐

Enable Promotion Check in Tendering ☐

Conversion Rounding Rule (from base currency)

Minimum Accepted Denomination

Enforce Minimum Denomination ☐

Debit Rounding Rule

Credit Rounding Rule

Tax Refund Eligible ☐

Set the appropriate values on the **Restrictions 1** tab as follows:

Configuration	Description
Credits Allowed	Select the checkbox to indicate if the customer can receive return amount in the same tender.
Credits Tendering Restrictions	Select the applicable option from the drop down list that will set constraints on the amount to be paid (or part-paid) in the return using this Tender option. <b>Amount less than or equal balance</b> is generally applicable.
Credit Limit	Enter a numeric value that will determine the maximum amount that may be paid back using this Tender (0.00 indicates unlimited)
Aggregate Credit Limits	Select the checkbox to indicate, in a multi-part-payment accumulate the amounts paid with Tenders of this type to apply the Credit Limit restriction specified above.
Minimum Credit Amount	Enter a numeric value that will determine a threshold amount below which this Tender type cannot be used for full- or part return.
Credit Rounding Rule	Select the applicable option from the drop down list that will determine the minimum accepted denomination for credits.

## Tender – Restrictions 2 Tab

**Tender Maintenance** ? || x

Save Cancel

You are editing Tender ID 'CSH' for Region 'United Kingdom'

General Restrictions 1 Restrictions 2 Discount Restrictions Overlap Tenders User Limits Cash Management Change Surcharge Cash Tender Attributes

Prevent Post-Transaction Void ☐

Debit Tender Effect on Loyalty Points None

Credit Tender Effect on Loyalty Points None

Authorisation Code to Use Alternative Tender -

Authorisation Code to Return to Alternative Tender -

Return Tenders

Return Tenders	
-	-

+ Add Cards PDQ UK

Set the appropriate values on the **Restrictions 1** tab as follows:

Configuration	Description
Credit Tender Effect on Loyalty Points	Select from the drop down list, the effect a return or a refund will have on customers' Loyalty points. Either <b>None</b> or <b>Deduct Loyalty points</b> are generally applicable.
Return Tenders	Selected the applicable return tender type from the drop down list of all configured Tenders. This enables the User to define the allowed return tenders. Multiple options may be added against this property.

## Broadcasting

To deliver the configuration changes to the POS, broadcast the following entity.

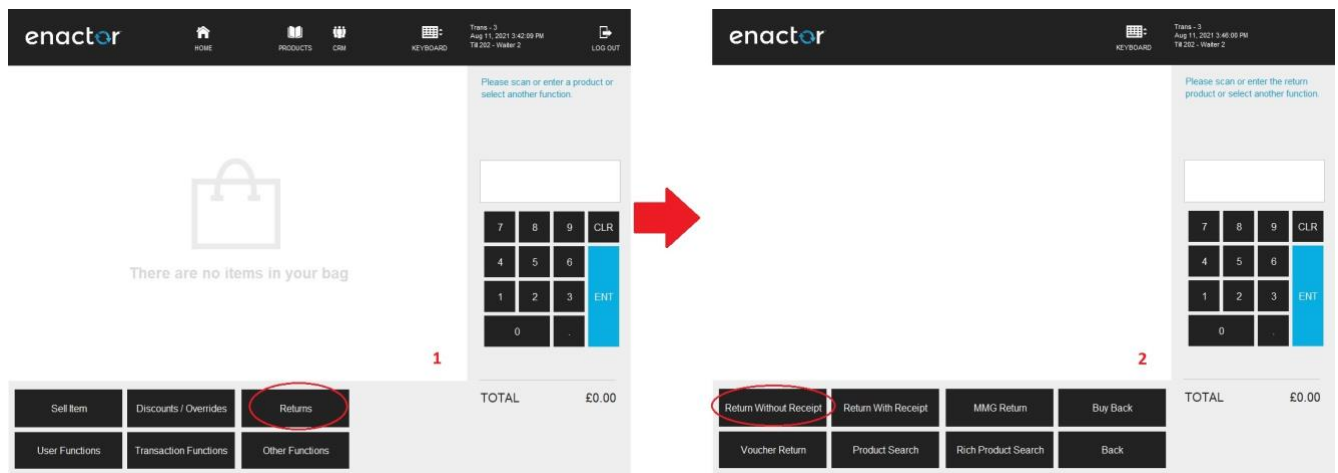
- Reason
- Menu
- Roles
- Tenders

# POS Functionality

## Item Return Reason Functionality

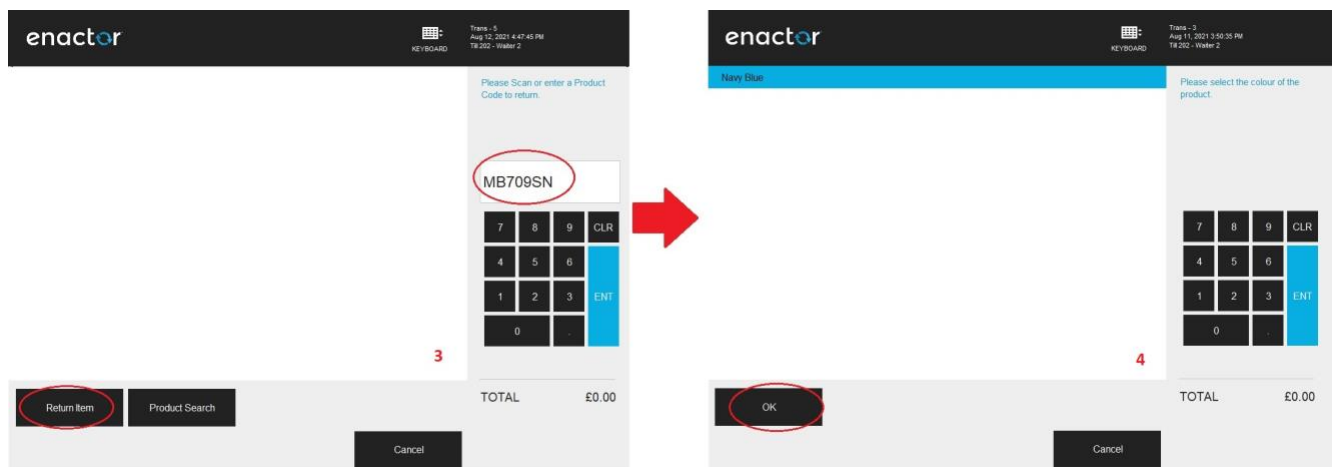
Select **Return** option as shown on screen 1.

Select **Return Without Receipt** as shown on screen 2, and the operator may either scan barcode if available, enter the product code or use product search to identify the product that requires returning.



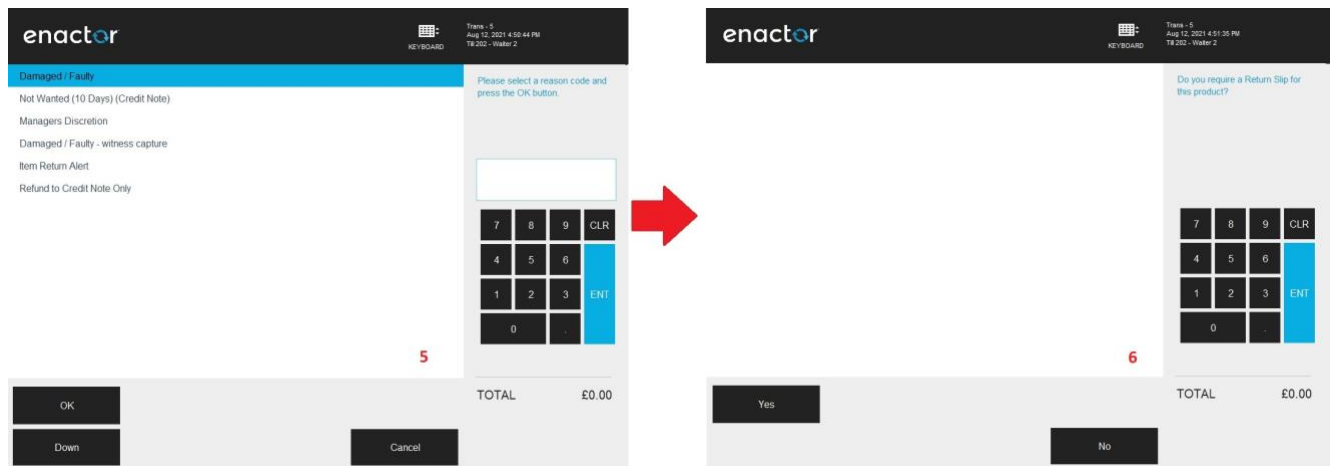
On entering the product code, the operator will be presented with the option to **Return Item** as shown on screen 3.

The operator will then be prompted to select product details (Size, Colour etc.) as shown on screen 4. On selection of accurate colour / size details, select **OK** to proceed.

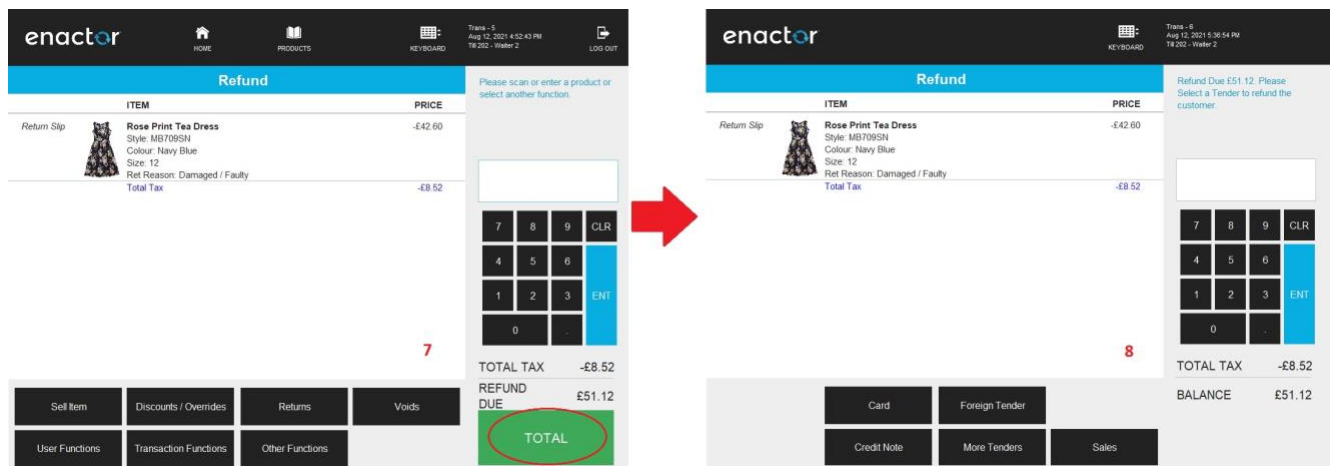


The operator can then select the applicable Reason and click **OK** to apply the Item Return function to the selected product.

As shown on screen 4 the operator will be promoted to select whether a return slip is required for this Item Return.



Select **Total** as shown on screen 7. On confirmation of the balance due, select the applicable tender as shown on screen 8 to refund the customer and complete the Item Return.

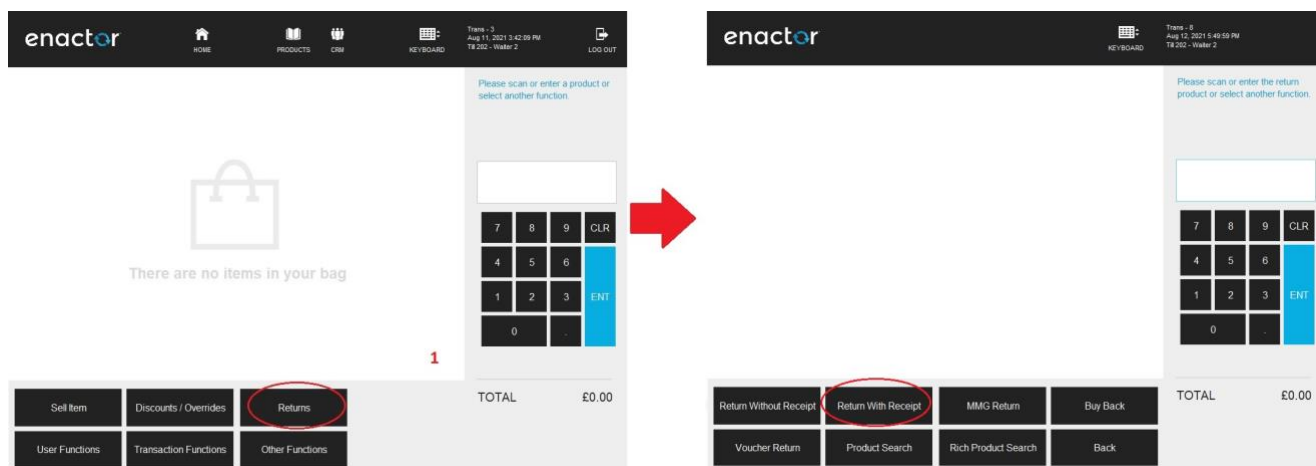




## Receipt Return Reason Functionality

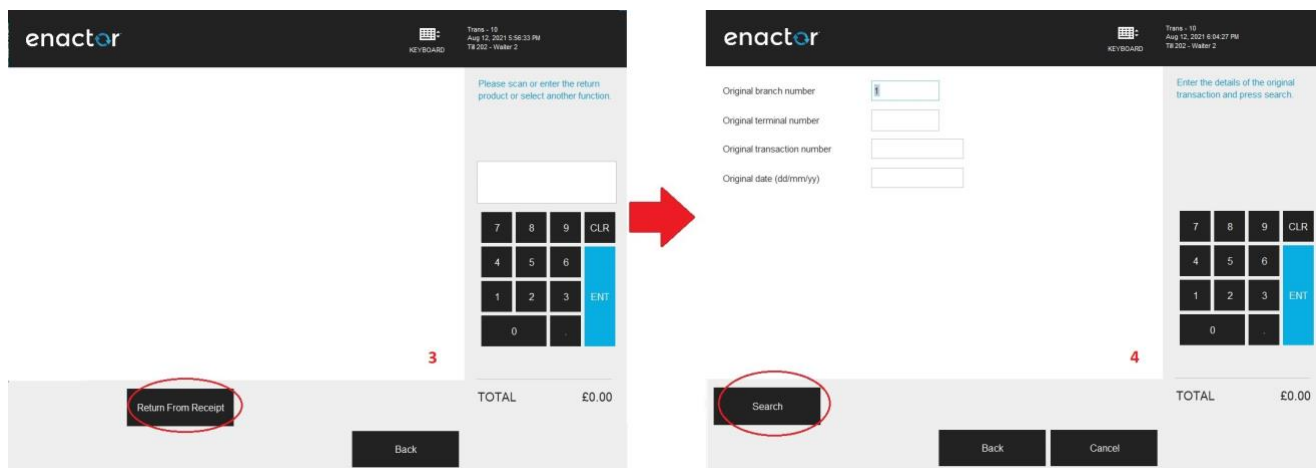
Select **Returns** option as shown on screen 1.

Select **Return With Receipt** as shown on screen 2.



The operator may either scan barcode, enter the product code if available or select **Return With Receipt** button as shown on screen 3 to search using the original transaction details.

Enter transaction details as shown on screen 4 and select **Search**.



Select the transaction from the list and select the **Select** button as shown on screen 5.

As shown on screen 6 all transaction details will be shown for the operator to select from. If there are multiple products, select an individual product to return and it will be highlighted in blue.

Or select **Return Entire Receipt** button to perform a return of the entire transaction.

Select **Finish** to proceed as shown on screen 6.

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Trans - 10  
Aug 12, 2021 6:05:35 PM  
TR 202 - Water 2

Branch	Term	Trans	Date	Time	Total
1	202	9	12/08/21	17:53	£48.72
1	202	8	12/08/21	17:48	£25.00
1	202	7	12/08/21	17:44	£28.80
1	201	2110	12/08/21	16:37	£0.00
1	8000	12	12/08/21	14:22	£10.00
1	8000	11	12/08/21	14:06	£20.00
1	201	2109	12/08/21	13:25	£18.00
1	201	2108	12/08/21	11:38	£18.00
1	501	600	12/08/21	11:00	£18.00
1	501	599	12/08/21	10:59	£10.00
1	501	598	12/08/21	10:59	£18.00
1	501	597	12/08/21	10:58	£0.00
1	501	596	12/08/21	10:57	£18.00

5

View Up Select Down Back Cancel

TOTAL £0.00

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Trans - 11  
Aug 12, 2021 6:14:32 PM  
TR 202 - Water 2

HD Complexation Starter Kit  
Style: 1379692  
Colour: Pink Porcelain  
Size: 2  
Return Quantity: 1.0  
HD Complexation Starter Kit  
Style: 1379692  
Colour: Pink Porcelain  
Size: 2  
Cash UK  
£10.00  
£10.00  
£20.00

6

Unselect Change Return Quantity Return Entire Receipt Down Finish Cancel

TOTAL £0.00

The operator can then select the applicable Reason and click **OK** as shown on screen 7 to apply the Receipt Return function to the selected product or Receipt.

Select **Total** as shown on screen 8 to confirm total refund amount due.

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Trans - 11  
Aug 12, 2021 6:15:27 PM  
TR 202 - Water 2

Damaged / Faulty (Over 30 Days)  
Damaged / Faulty (30 Days) all regions  
Damaged / Faulty (30 Days)  
Not Wanted (10 Days)  
Managers Discretion  
Return to Credit Note  
Return within (1-2 days)  
Damaged / Faulty (No date limit)  
Damaged / Faulty (Over 30 Days) - witness capture

7

OK Down Cancel

TOTAL £0.00

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Trans - 11  
Aug 12, 2021 6:15:44 PM  
TR 202 - Water 2

Refund

ITEM	PRICE
Return	
HD Complexation Starter Kit Style: 1379692 Colour: Pink Porcelain Size: 2 Ret Reason: Damaged / Faulty (Over 30 Days)	£10.00

8

Sell Item Discounts / Overrides Returns Voids User Functions Transaction Functions Other Functions

REFUND DUE £10.00

TOTAL

Select the applicable Tender type as shown on screen 9 and select OK to proceed. Based on the tender chosen the operator will be prompted to proceed with the receipt return.

\*If enabled the operator will be prompted to verify customer signature.

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Trans - 11  
Aug 12, 2021 6:16:12 PM  
TR 202 - Water 2

Cards PDQ  
Cards UK  
Cash  
Cash UK  
Cash Winning Lottery  
Cash Lottery  
Credit Note UK  
Customer Account  
Customer Account  
Employee Account  
Euro Cash UK  
Gift Card UK  
Loyalty Points UK  
PAYPAL  
Payment Service  
Swedish Krona UK  
United States Dollar UK

Original tender Cash UK £10.00  
Please select the return tender

9

OK Up Down Skip Tender Skip Original Tenders

REFUND DUE £10.00

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Trans - 11  
Aug 12, 2021 6:16:29 PM  
TR 202 - Water 2

Refund

ITEM	PRICE
Return	
HD Complexation Starter Kit Style: 1379692 Colour: Pink Porcelain Size: 2 Ret Reason: Damaged / Faulty (Over 30 Days)	£10.00

10

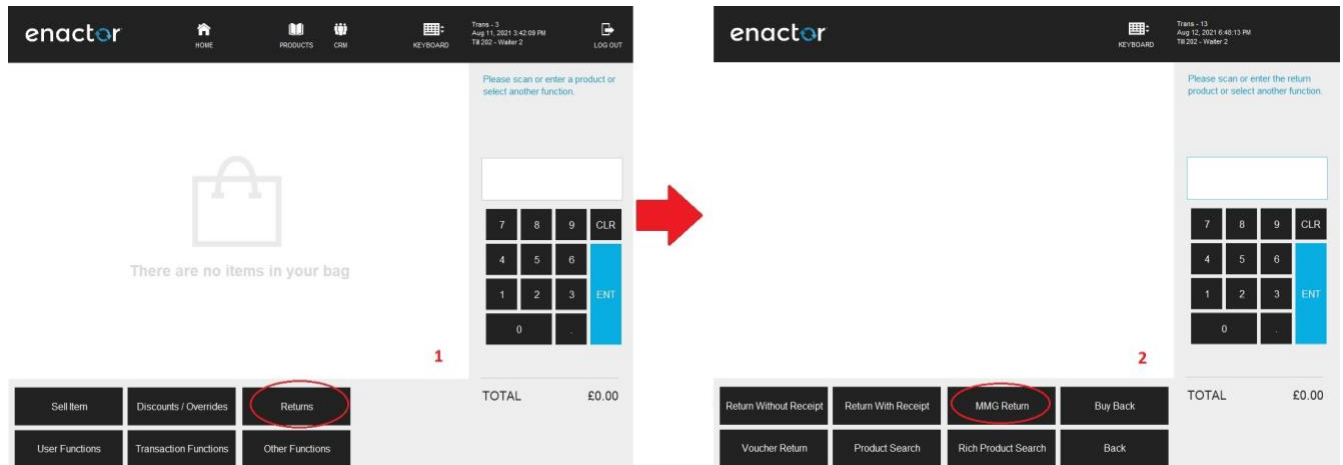
OK £10.00 Cancel

REFUND DUE £10.00

## MMG Return Reason Functionality

Select **Returns** option as shown on screen 1. Select

**MMG Return** as shown on screen 2.

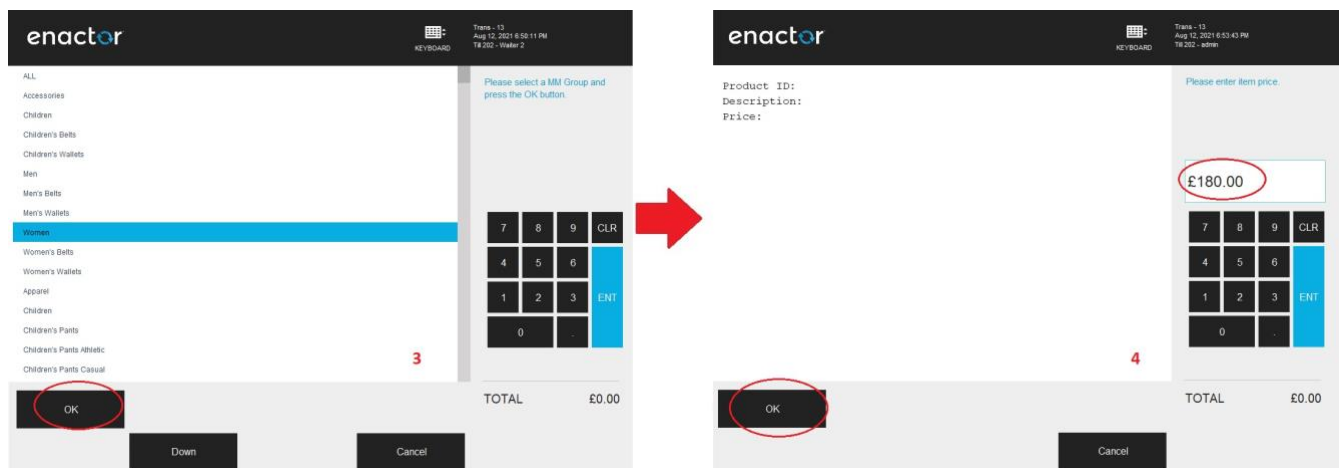


Select the MM Group as shown on screen 3 and select **OK**.

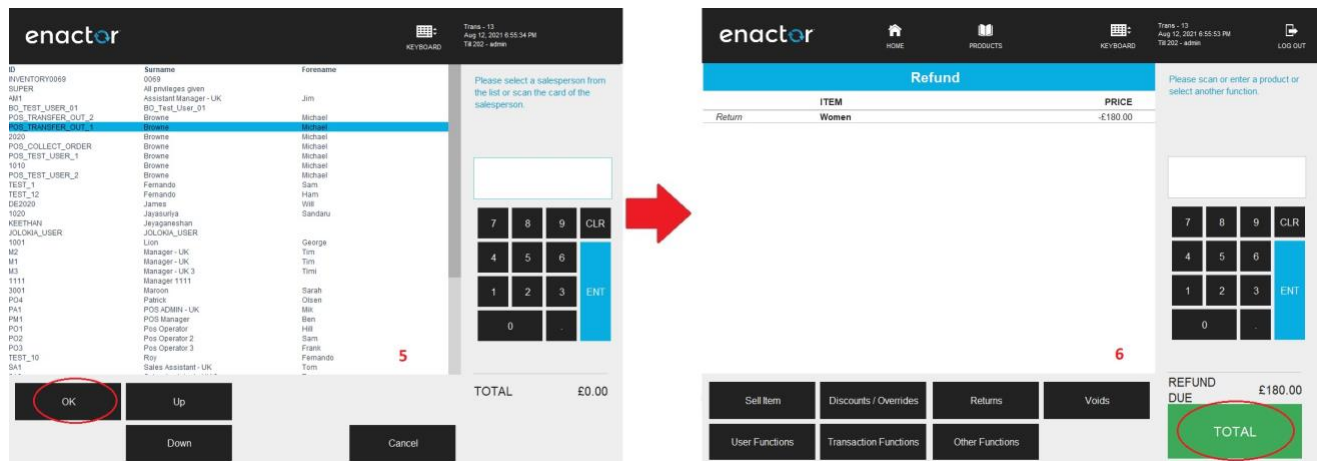
\*Only operators with required privileges can perform MMG Returns.

If the operator has the said privileges, as shown on screen 4 he / she will be prompted to enter a price against the product that the customer wishes to return.

Enter the product price and select **OK** to proceed.



Select a salesperson from the list as shown on screen 5 and select **OK** to proceed.



As shown on screen 6 complete the MMG Return and Refund the due amount to the customer after selecting the applicable tender type.

# About This Document

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The amendment history of this document can be found in the table below.

## Current Document Version information

Document Version 1.0

Product Version 2.6

## Document Context

This document is part of the Enactor Product Documentation Series. All Enactor products include a comprehensive documentation set designed to improve understanding of the product and facilitate ease of use.

## Document Inquiries

At Enactor we aspire to producing the highest quality documentation to reflect and enhance the quality of our product. If you find that the document is inaccurate or deficient in any way, please assist us in improving our standard by letting us know.

For matters of document quality or any other inquiries regarding this document please contact:

By Email: [documentation@enactor.co.uk](mailto:documentation@enactor.co.uk)

# Document History

The following versions of the document have been produced:

VERSION	STATUS	ISSUE DATE	AUTHOR	REASON FOR ISSUE
1.0	Initial Draft	12/08/21	Thilini Sayakkara	Initial version