

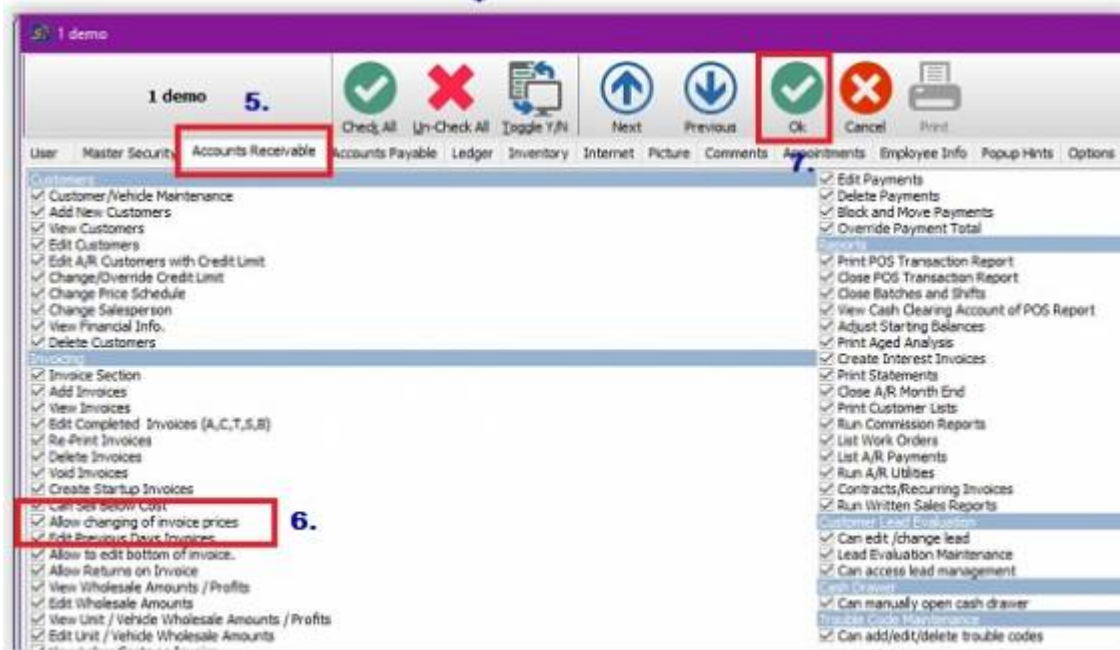
Handling Inventory Returns in System Five

In a business industry, sometimes it happens that customer comes in and returns one or more items. The reason for the return may vary such as the customer dislikes the item, the item is damaged, etc. In the event of a return, the customer may ask for a replacement, refund, or just credit to be reflected in their account. System Five provides a simple way of handling your return.

Requirements

System Five User should have the ability to return an item in an invoice. Hence a specific box needs to be checked. (Likewise, the user should have the ability to edit or create sale)

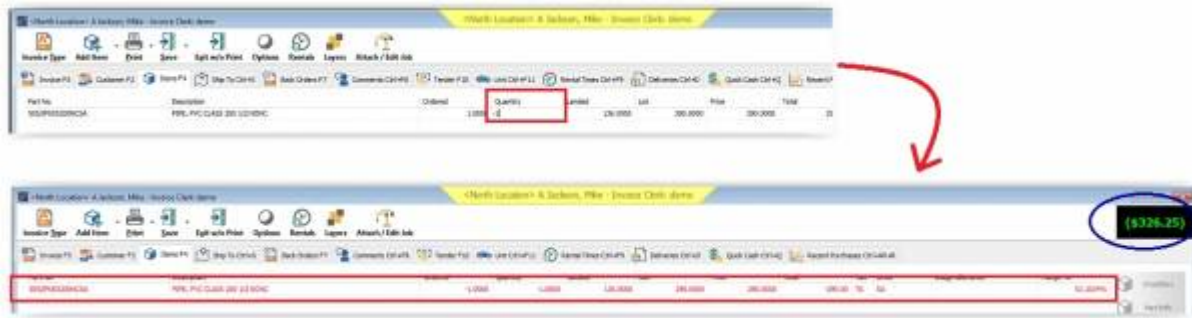
1. [Setup Wizard](#) > [Users and Security](#) > [Names and Passwords](#)
2. Select a User.
3. Click '**Edit User**'.
4. Go to '**Inventory**' tab.
5. Check the following boxes provided in the screenshot below.



You may refer to this training video [pos_returns.flv](#).

How to do a Return

Returning an item is possible, provided that your customer already purchased an item from you, and a previous sale invoice was already created. 1. Create a new invoice.
2. Attached the inventory item that the customer would like to return.
3. Under the 'Quantity' column, put in the quantity of the returned item
4. Press 'Enter'.



Common Results of a Return

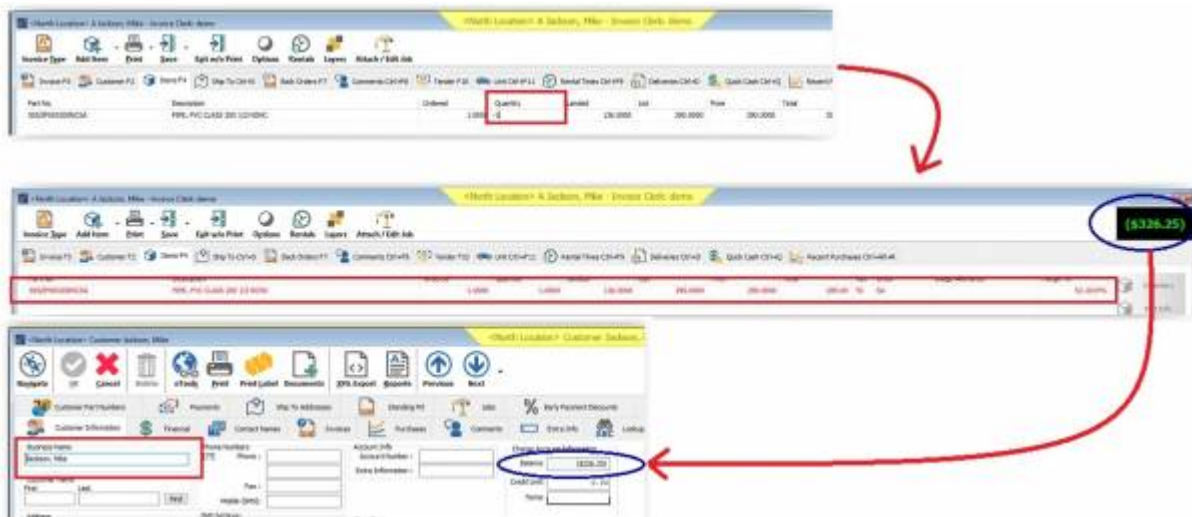
1. Refund

There are instances that after a customer made a return, instead of asking for a replacement, they will ask for a refund. A refund can be in the form of a [refund check](#), cash, and etc.

2. Credit on Account

If your customer does not like a refund and just want to reflect the said amount in their account, all you have to do is to do the following:

- Create a new invoice.
- Attached the item to be returned.
- Under the quantity column, put the of the returned item.
- Close and exit the invoice.



The said value may or may not automatically reflect as a credit in the customer's account balance. Customer balance will be dependent on the current total outstanding invoices and credit invoices.

3. Replacement

If in the event that the customer would instead ask for a replacement item, you all you have to do is the following:

- A. Create a new invoice.
- B. Attached the item to be returned.
- C. Under the quantity column, put the of the returned item.
- D. In the same invoice, attached the replacement item.
- E. Close and Exit the invoice.



Replacement items can be of the same item or a different one. If the customer would like to have a different item with a higher price value, the remaining balance can be paid for by the customer or depending on the agreement you and your customer have.

Other links

In order to further demonstrate on how to do about doing a refund in system five, you can check our video regarding [Different Process recording Returns of items, Refunds, Replacement or Credits](#)

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