



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.

The screenshot shows the 'Maintenance' window in FasTrax Director v1.386.21. The window has a navigation menu on the left with icons for Dashboard, Pricebook, Inventory, Reports, Queue, Maintenance (selected), Loyalty, and Schedules. The main area is titled 'Return Customers' and contains a table with the following data:

First Name	Last Name	License #	City	State	Zip	Phone	Added	Last Activity	Last Store	Last Reg
JOHN	DOE	999999	Madison	AL	99999	999-999-9999	9/10/2018 1:29:38 PM	9/10/2018 1:30:46 PM	1	1
JANE	DOE	111111	Madison	AL	11111	111-111-1111	9/10/2018 1:47:08 PM	9/10/2018 1:47:34 PM	1	1

At the bottom of the table, there are buttons for 'Add', 'View', and 'Print', along with a 'Show:' dropdown menu set to 'All Customers' and a 'Filter' button. The status bar at the bottom indicates '2 Stores Selected To Receive Changes/For Reporting' and 'Corporate Mode Settings'.



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"

Settings

Settings Integrations Maintenance

Change Password

Existing Password: New Password: Verify New Password: Change

FasTrax Settings

Corporate Mode Invoices - Default Auto Apply To Store Use Average Cost

Support Mode Invoices - Default Accept Cost Changes Disable Adjustment Average Cost

Show Custom Reports Tab Invoices - Allow Items Without Vendor Part Queue Discount Items With Discounts

Show Custom Summary Report Allow Zero Cost Show Retail On Order Header

Show Custom Recap Report Reset Store Number When Creating New Invoice Receive Buydown Messages

Automatically Send Message To Store On Price Changes Prompt On Large Date Ranges In Intensive Reports Show New Message Notification (Check Every 5 Minutes)

Prompt On Orders Not Meeting Consistent Requirements Disable Queue History Show Only Active Items

Update Subunit Cost Based On Purchase Unit Cost Disable Deleting Invoices Append Store # To Invoice # When Creating Invoices

Disable Clear QOH Disable Editing And Deleting Applied Invoices Retail After Buy Down

Use Accounting Format In Timeclock Expand 8 Digit UPCs Lottery Base is 0

Enable Gift Cards Show Old Cost On Invoices Enable Price Level Change Log

Enable PMB Disable PO Qty In Item Details Use New EDI Settings

Enable Return Forms Loyalty Coupons Can Report As Discounts

Use Extd Description On Reports

Default Search By: UPC Number Check for news every 720 Minutes

Week Begins On: Monday Queue Chunk Size: 10000 New Item Days

Queue Path: C:\Fastrax\TempXML\ ...

EDI Reorder Path: C:\Fastrax\Reorder\ ...

EDI Receiving Path: C:\Fastrax\Receiving\ ...

Report Header 1: Report Header 2:

Report Header 3: Report Header 4:

UPC Creation Prefix: 00001 Next UPC #: 1 Show Header Info On Invoices Refresh Store Tax Rates Save

3. Choose the "Save" button



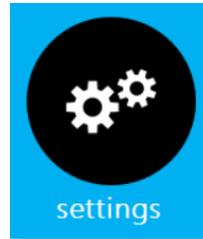


Enabling Return Forms in POS

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"

FasTraxPOS



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:

License #	First Name	Last Name	Phone	City
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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:

The screenshot shows a mobile application interface for adding a customer. The title bar at the top reads "management | CUSTOMER DETAILS" and includes a small gear icon on the right. The form contains the following fields and controls:

- 1. first name: [text input]
- 2. last name: [text input]
- 3. phone #: [text input]
- deny returns: [checkbox]
- 4. address: [text input]
- 5. address line 2: [text input]
- 6. city: [text input]
- 7. state: [dropdown menu]
- 8. zip: [text input]
- 9. license #: [text input]
- 10. Keyboard icon (virtual keyboard)
- 11. cancel button
- 12. save button

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.

!	@	#	\$	%		&	*	()	-	:	?
Q	W	E	R	T	Y	U	I	O	P	1	2	3
A	S	D	F	G	H	J	K	L	\	4	5	6
Z	X	C	V	B	N	M	,	Clear	7	8	9	
+	BACK	SPACE		"	TAB	'	0	.				

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

FastTrax POS

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

pos | RETURN

scan item/receipt to return
or choose option below

manually enter
receipt #

manual item
return

cancel



Return Forms in Director

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

FasTrax Director v1.386.21

Maintenance

Stores | Departments | Dept Groups | Tenders | POS Flags | POS Accounts | Employees | Vendors | House Accounts | Negative Check | Logins | Pricebook

Return Customers | Transactions

Return Customers

First Name	Last Name	License #	City	State	Zip	Phone	Added	Last Activity	Last Store	Last Reg #
NEW	CUSTOMER	2222222				222-222-2222	9/10/2018 3:14:12 PM	9/10/2018 3:14:30 PM	1	1
JOHN	DOE	999999	Madison	AL	99999	999-999-9999	9/10/2018 1:29:38 PM	9/10/2018 3:13:47 PM	1	1
JANE	DOE	111111	Madison	AL	11111	111-111-1111	9/10/2018 1:47:08 PM	9/10/2018 1:47:34 PM	1	1

1 Add 2 View 3 Print 4 Show: All Customers 5 Filter 6 Filter

2 Stores Selected To Receive Changes/For Reporting Corporate Mode Settings

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:

Return Customer Details x

Customer Details

First Name: Address:
Last Name: City: State: Zip:
License #: Phone:
License State: Returns

Information

Added Date: Added At:
Added By:
Last Activity: Store #: Reg #: Receipt #: Amount:
Lifetime Activity: # Returns: Value:

Transaction History

Date	Store #	Reg #	Rcpt #	Amount	Notes
9/10/2018 1:47 PM	1	1	6	\$9.03	Didn't like

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.

Maintenance

Negative Check | Logins | Pricebook Zones | Carton Counts | POS Settings | Gift Cards | Sales Restrictions | Return Forms

Return Customers | Transactions

Return Transactions

Date	Store #	Reg #	Rcpt #	Amount	First Name	Last Name	Employee	Notes
9/10/2018 3:14:30 PM	1	1	8	\$9.03	NEW	CUSTOMER	Cashier	Didn't like product
9/10/2018 3:13:47 PM	1	1	7	\$45.99	JOHN	DOE	Cashier	Damaged product
9/10/2018 1:47:34 PM	1	1	6	\$9.03	JANE	DOE	Cashier	Didn't like
9/10/2018 1:30:46 PM	1	1	5	\$10.00	JOHN	DOE	Cashier	Item never worked

1 View 2 Print 3 Filter

2 Stores Selected To Receive Changes/For Reporting Corporate Mode Settings

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