Merchandise returns and restocking fees

A workflow playbook for AIM POS

This playbook covers taking merchandise back from a customer and putting the money back in their hands. It walks the return screen from invoice lookup to refund, and shows how to set the restocking fee so AIM calculates it for you on every return afterward. Every step comes from the AIM training video linked below.

> **What this playbook covers.** The video this playbook is drawn from demonstrates a merchandise return. It does not demonstrate returning a firearm. If you need to return a firearm, contact the AIM technical support team rather than assuming these steps apply.

Before you start

- Have the invoice number if you can. You can go straight to an invoice by number, or leave the box blank and search for the customer instead.
- Set your restocking fee first if you want AIM to calculate it. The fee comes from a system variable, and once it is set, AIM applies it to the next return you do.
- Know whether the customer still owes money on the invoice. That changes whether you use the auto reduce balance option described below.

Set your restocking fee

> **Watch:** Merchandise Return

This is a one-time setup. The video covers it at the end, but doing it first means your restocking fee is ready before you run a return.

1. Go to **Maintenance** > **General** > **System Variables**.
2. Type restock in the search. It is the only system variable that comes up.
3. Set the fee as either a flat amount per return or a percentage, whichever suits how you handle returns.
4. Click Save. The next return you do takes that restocking fee and calculates it automatically.

Run the return

> **Watch:** Merchandise Return

1. Go to **Modules** > **Returns** > **Merchandise Return**.
2. Enter an invoice number in the box that pops up to go directly to that invoice, or leave it blank and press Enter to do a customer search instead.
3. Set your options in the top left corner of the return window. You can search by SKU or invoice number, switch the location or tax authority if you need to, enter a reference number for the return, and backdate or forward-date the return.
4. Click Show All Items to display everything sold to that customer account, then select the items coming back.
5. Check your totals on the right. AIM shows the subtotal, the sales tax charged, the restock, tax and fee, and the total return amount.
6. Decide on the restocking fee. Leave Calculate Restocking Fee checked to apply it, or uncheck the box to waive it on this return.
7. Use auto reduce balance if the customer still has a balance on the invoice. Checking it returns only what has actually been paid to you.
8. Adjust an individual line if you need to. Right-click the line you are returning and enter a different return amount.
9. Click Save when the return is set up the way you want it.

> **Waiving the fee is a per-return decision.** Unchecking Calculate Restocking Fee affects only the return in front of you. The system variable stays as you set it, and the next return calculates the fee again.

Give the money back

> **Watch:** Merchandise Return

Saving the return takes you into the Point of Sale return screen, where you choose how the refund goes back to the customer.

1. Choose the refund method. Your options are Authorize Card to send it back to a card, a cash return, a company check return, or print company check if you are printing the check through the software.

2. Finalize the transaction.
3. Print or review the receipt on screen. That completes the return.

All videos in this playbook

Each section above links to its video. Here it is in one place.

Merchandise Return

When to call for help

Every step here comes from a dedicated video in the AIM library. To see any single step in full, watch the matching video. For hands-on help or training, contact the AIM technical support team.

This guide describes what AIM does on the screen. It does not replace your compliance responsibilities under ATF and state rules and is not legal advice.