

PaymentMate® Pharmacy Edition™ - how to return an item and refund a purchase

PaymentMate® Pharmacy Edition™ makes it easy to refund a credit, debit, flexible spending account, or other payment card. If your customer returns an item, all you have to do is scan the returned item, scan the card, and the software refunds the card. You can also refund on account or give the customer a cash refund.

Before you refund a customer

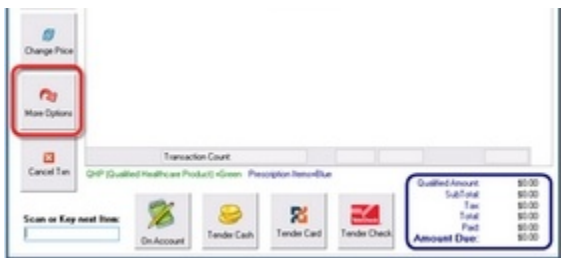
Before you refund a customer, you should first determine if you will *return* an item—such as an OTC (over-the-counter) or prescription—or if you will *void* a transaction. This document explains how to do a return and refund a card, or refund with cash, or refund on account.

NOTE: For instructions on refunding when voiding a transaction, see *PaymentMate Pharmacy Edition—how to void a transaction and refund a purchase*. Download it for free from www.TempusPayment.com/documents.

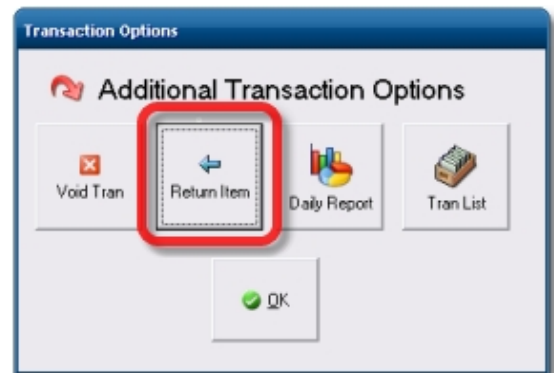
Doing a return and refunding a card, refunding with cash, or refunding on account

When your customer returns an item, PaymentMate Pharmacy Edition gives you the option of automatically refunding a card, or refunding with cash or on account. To accept a returned item and refund your customer:

- 1 On the **PaymentMate Transaction** window, select the **More Options** button. 



- 2 The **Additional Transaction Options** dialog box pops up; select the **Return Item** button. 



- 3 PaymentMate asks you to scan or key the item and press **ENTER**. Select **OK** and either scan the OTC or prescription item with the barcode scanner of your PaymentMate POS™, or type the UPC of the item in the **Scan or Key Next Item** box and press **ENTER** on the keyboard.



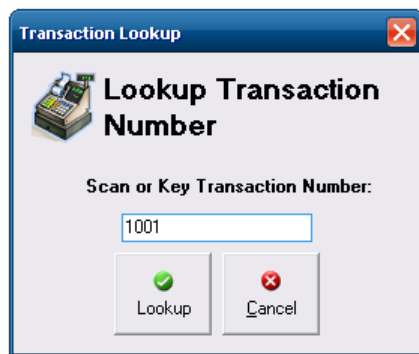
Note: Be careful to not delete the backslash (\) in front of the UPC you type. The backslash tells PaymentMate that you are returning the item, rather than selling it.

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4 If this is a return for an item you have not already added to the software's Manage Sales Items utility, the **Sales Item Editor** will pop up. Type the item's price in the **Retail Price** box, enter the other optional information (if desired), choose the returned item's options (if any), and select **OK** to save the returned item.



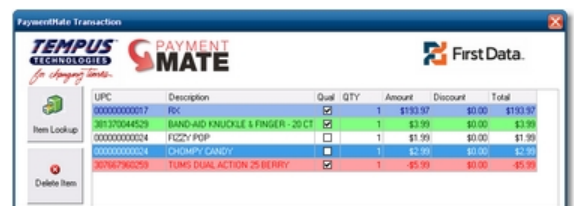
5 In the **Transaction Lookup Number** dialog box that pops up, type the ticket number on your customer's receipt—or type a zero (0) if he does not have a receipt—in the **Scan or Key Transaction Number** box and select **Lookup**.



Note: If PaymentMate could not find the ticket number, it displays a message saying, "Transaction not found; return anyway?" To return the item, select **Yes**.

6 In the **Enter Quantity to Return** dialog box, type the number of items to return and select **OK**.

7 PaymentMate adds the returned item(s) to the **PaymentMate Transaction** window with a negative amount. The returned item(s) has (or have) a red font and is (or are) highlighted in pink. If the customer is also purchasing other items, you may add these to the transaction, too.



8 If the amount due is *not* a negative number after adding all of the purchases and returns, complete the transaction normally.

Note: For instructions on adding purchased items to a transaction and processing a transaction, see the *PaymentMate Pharmacy Edition Reference Guide*. The 190+ page document is available to download and print for free at www.TempusPayment.com/documents.

9 If, after adding all returns and purchases to the **PaymentMate Transaction** window, the amount due is a negative amount and you want to give the customer a cash refund, then:

- Select the **Tender Cash** button on the bottom pane of the **Transaction** window
- PaymentMate opens the cash drawer of your PaymentMate POS, prints a receipt, and displays the change due. Give the receipt and correct cash to your customer


10 If the amount due is a negative amount and you want to give a refund on account, then:

- Select the **Tender On Account** button on the bottom pane of the **Transaction** window
- Give the receipt printed at the receipt printer of the PaymentMate POS to your customer

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If the amount due is a negative amount and you want to refund your customer's credit, debit, flexible spending account, or other card, then:

- Select the **Tender Card** button  on the bottom pane of the **Transaction** window
- PaymentMate asks you to swipe the card or select **Manual Key**. Either swipe the card through a card reader of your PaymentMate POS, or select the **Manual Key** button.
- In the **PaymentMate Credit Refund** dialog box, type the card number in the **Card Number** box
- Type the expiration date in the **Expiration** box (with two numbers for the month, a forward slash (/), and two numbers for the year)
- If desired, type an *optional* transaction identifier in the **Transaction Ident** box
- If desired, type an *optional* customer identifier in the **Customer Ident** box
- Add the refund to the software's current card batch by selecting **Process Now**



The screenshot shows a dialog box titled "Credit Refund" with the PaymentMate logo and "Credit Refund" text. The "Amount" is \$5.99. The "Card Number" field contains 371449635398431. The "Expiration (MM/YY)" field contains 12/12. The "Tran Ident / Ref" field contains RX-1234. The "Customer Ident / Ref" field contains JJ SCHMIDT. At the bottom, there are two buttons: "Process Now" with a green checkmark icon and "Cancel" with a red X icon. The First Data logo is also visible at the bottom left.

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PaymentMate prints a receipt at the receipt printer of your PaymentMate POS and displays a message saying, "Credit has been issued in the current batch." Select **OK** and give the receipt to your customer.

Note: Your customer's credit, debit, or other card account will not receive the refund *until after* you close the daily card batch. For instructions on closing the batch, see the document *Closing the daily credit and debit batch, and printing batch reports, with PaymentMate*. The document is available to download and print for free at www.TempusPayment.com/documents.