TACTICALPAY POS

Refunds, Restocking Fees & Store Credit

TacticalPay POS | Refunds

TacticalPay POS allows you to process full or partial refunds directly from the transaction record. Refunds can be returned to any payment method, reduced by a restocking fee, or issued as store credit in the form of a **Gift Certificate** — and items can optionally be restocked back into inventory. All refunds are logged against the original transaction for a complete audit trail.

Part 1 — Find the Transaction

Step 1 — Navigate to Sales > Transactions

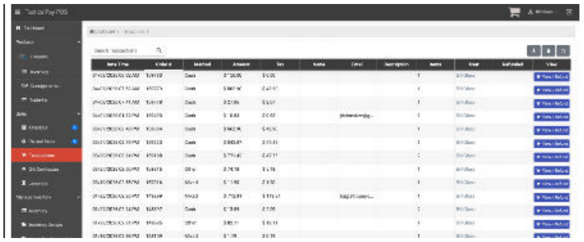

Fig. 1 — Transactions list: order history with method, amount, tax, and refund status.

Go to **Sales > Transactions** in the left navigation. The list shows all transactions sorted by date, with columns for order number, payment method, amount, tax, customer name, email, items, user, and refund status.

Use the **Search Transactions** bar to find a specific order by order number, customer name, or email. Transactions that have already been refunded show **Refunded** in the Refunded column.

Click **View** / **Refund** on the row you want to process.

Tip: You can also reach a transaction directly from the receipt — the order number on any printed or emailed receipt links back to the transaction record.

Part 2 — Process the Refund

Step 2 — Open the transaction and click Refund

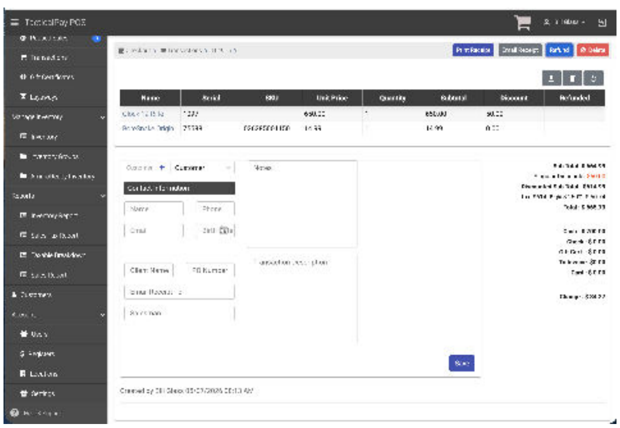

Fig. 2 — Transaction record: line items, totals, and action buttons.

The transaction record shows all line items with their serial number, SKU, unit price, quantity, subtotal, discount, and refund status. The right side displays the payment method breakdown.

Four action buttons appear at the top right:

- **Delete** — permanently removes the transaction record
- **Email Receipt** — resends the receipt to the customer
- **Print Receipt** — reprints the receipt
- **Refund** — opens the refund modal

Click **Refund** to proceed.

Important: Delete permanently removes the transaction record and cannot be undone. Use **Refund** — not Delete — when processing a return.

Step 3 — Complete the Refund modal

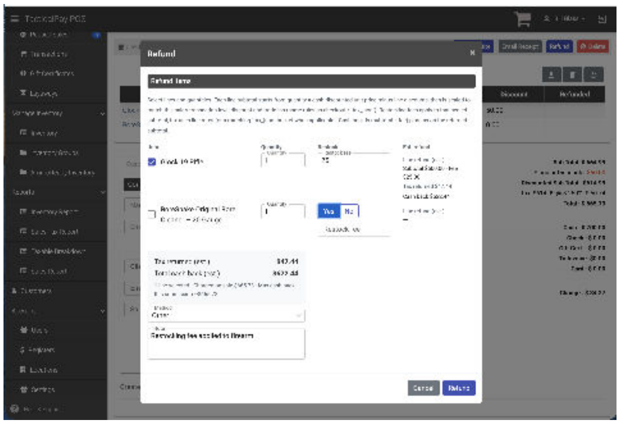

Fig. 3 — Refund modal: select items, set Restock and Restock fee, choose method, register, and note.

The Refund modal lists all refundable line items. Configure each field:

- **Item checkbox** — check items to include (uncheck for partial refunds)
- **Quantity** — number of units being refunded
- **Restock?** — Yes / No (non-firearm lines only; see Note)
- **Restock fee** — dollar amount deducted from cash back
- **Method** — Cash, Card, Other, etc.
- **Registers** — cash drawer when refunding cash
- **Note** — reason or approval, e.g., “Approved by Mgr. Jones”

Click **Refund** to process.

Note: Firearm line items no longer show the **Restock?** toggle — firearms are not returned to retail inventory through this modal. Use the **Restock fee** field to charge a fee on the firearm return, and update your bound book in **FFL Boss** separately to reflect the firearm coming back in.

Part 3 — Apply a Restocking Fee

Restocking fees recover costs associated with processing a return — inspection, repackaging, lost shelf time, or merchant-services costs on the original card sale. Enter the fee in the **Restock fee** field on the refund line. Sales tax is recalculated on the post-fee subtotal, so the customer is not refunded tax on the portion of the sale you’re keeping as a fee.

When to charge a fee

- **Firearms** — the primary use case, since firearms aren’t auto-restocked through the modal
- **Opened or used product** — covers re-inspection or markdown to clearance
- **Special orders** — items ordered for the customer that may not resell at full price
- **Card-original refunds** — partial recovery of card-processing costs the merchant absorbs even on a refund

Tip: Document who approved the fee in the **Note** field. The note appears on the refunded transaction record and on any reprinted receipt, which supports the customer-service conversation if the fee is later disputed.

Important: A restocking fee is **not** a separate charge — it is a reduction of the refund. Do not also create a fee line on a new sale. If the customer disputes the fee later, void the refund and reprocess rather than issuing an additional charge.

Part 4 — Refund as Store Credit

Store-credit refunds return the value of the item to the customer as a **Gift Certificate** rather than to cash or card. The transaction is still marked refunded — no money leaves the drawer — and the refunded amount is then issued as a certificate the customer can redeem at a future checkout.

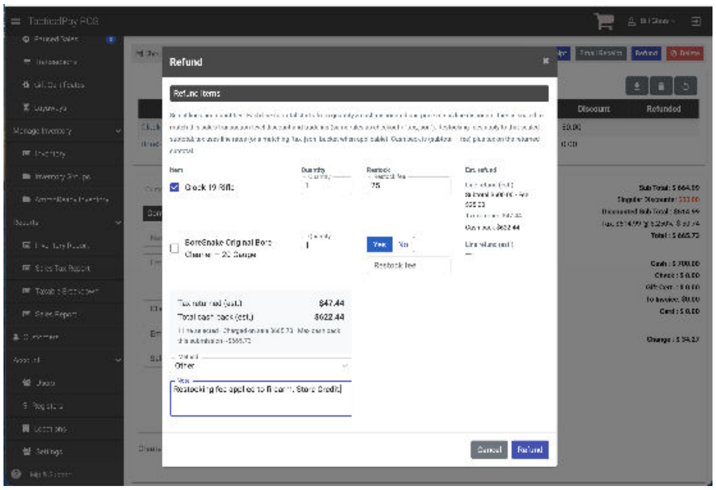

Fig. 4 — Refund modal: Method = Other, Store Credit added to Note.

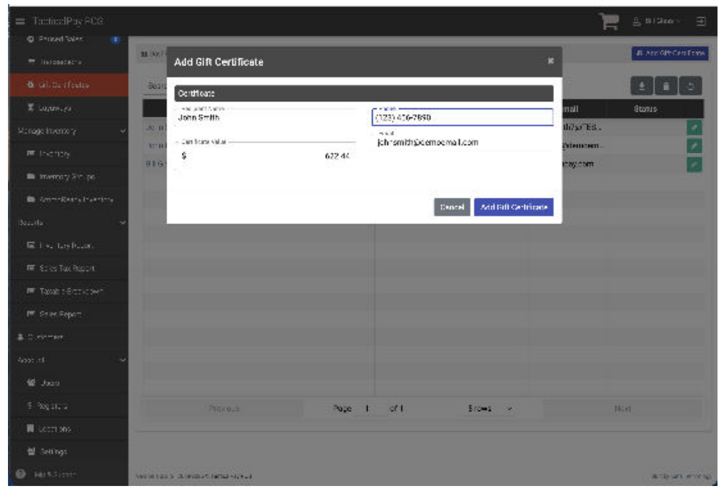

Fig. 5 — Add Gift Certificate modal: value matches Total refunded.

Step 1 — Process the refund with a Store Credit note

Configure the refund modal as for a normal refund, with two changes:

- **Method** — set to **Other** so the refund is not returned to cash or card
- **Note** — append **Store Credit** (e.g., “Restocking fee applied to firearm. Store Credit.”) so the audit trail records the intent

Click **Refund**. The **Total refunded** amount on the transaction record is the value to issue as store credit in the next step.

Step 2 — Issue the credit as a Gift Certificate

Navigate to **Gift Certificates** in the left navigation and click **Add Gift Certificate**. Fill in:

- **Recipient Name** — the customer’s name
- **Phone** / **Email** — from the customer record
- **Certificate Value** — the **Total refunded** amount

Click **Add Gift Certificate**. The system generates a unique **Code** the customer redeems at checkout. The new certificate appears in the **Gift Certificates** list with its code, the recipient’s contact info, and the remaining balance.

Tip: Email the certificate **Code** to the customer or write it on a printed receipt — it is the only thing they need at checkout to redeem the balance.