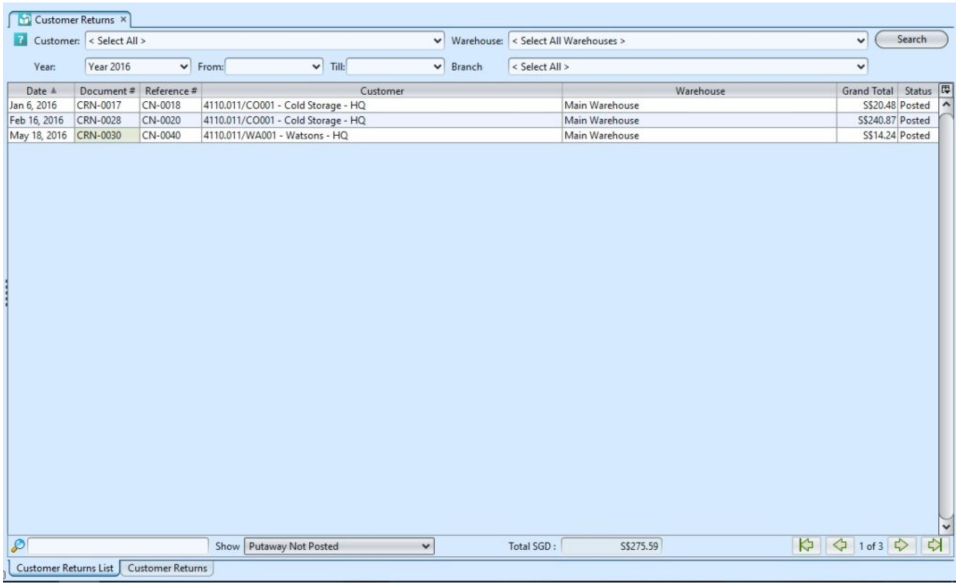
Customer Returns

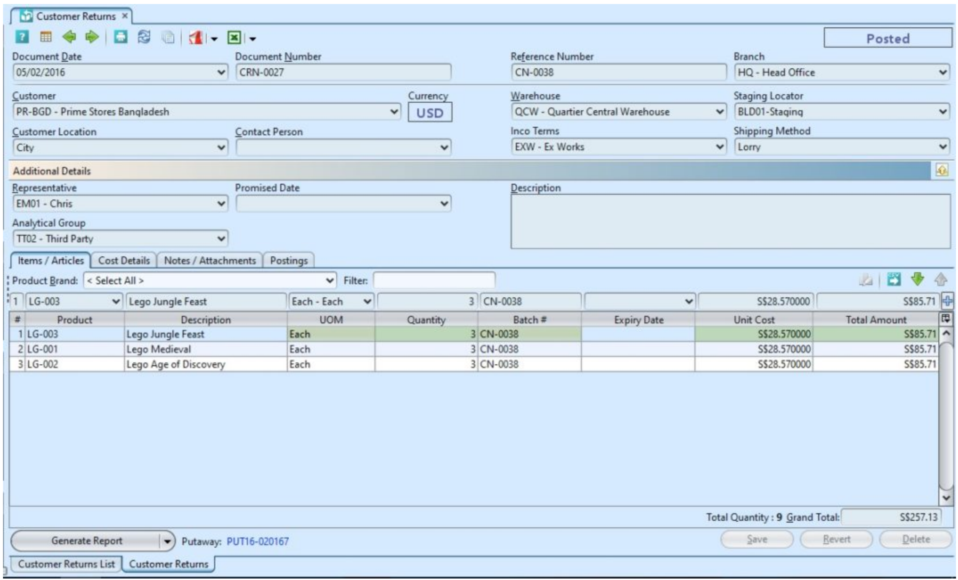
The Customer Returns view allows the user to view and inquiry any returns from the customers. The user is also allowed to drill down from any selected transaction to the details of the returns.

Below actions are available under ***"Customer Returns":***

Create new, edit and delete customer returns

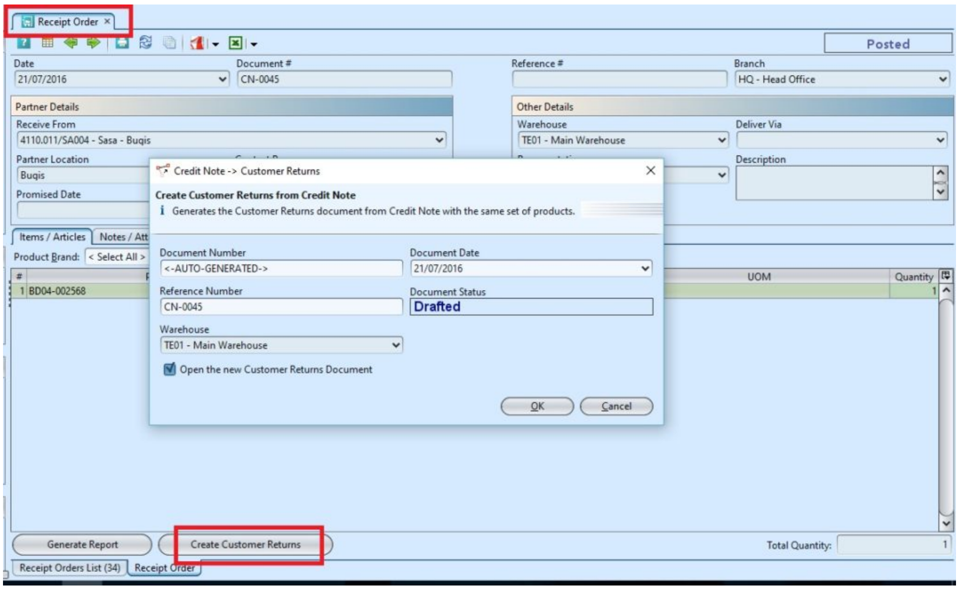
View and search customer returns



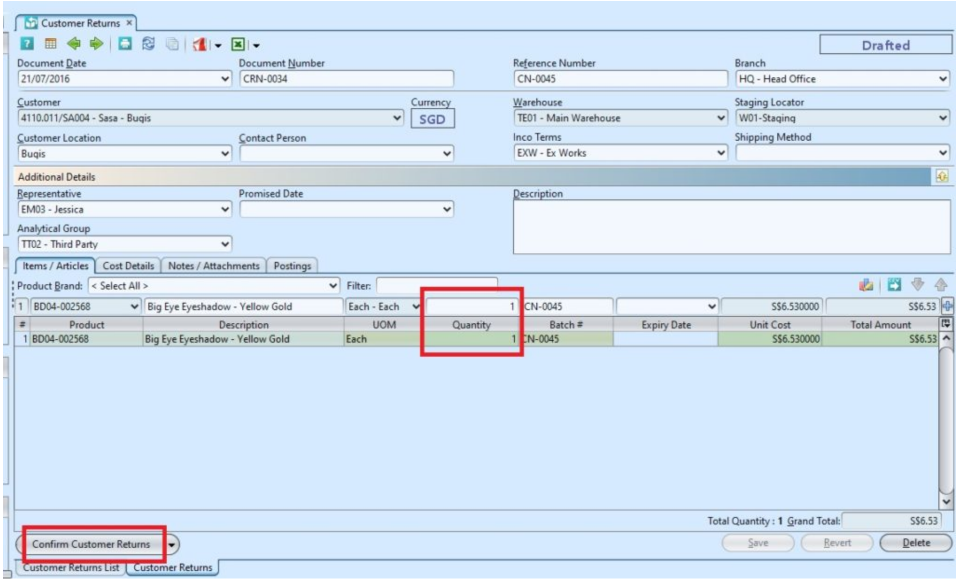


Generate Customer Returns

1. The customer return document is to be generated from receipt order document using ***"Inventory – (Inbound) Receipt Order"***. Open the receipt order document and click ***"Create Customer Returns"*** button at the bottom left of screen to generate a new customer return. A link to show the customer return will be created, replacing the button



2. User may edit the customer return's information, for example quantity to be return is different from the ordered quantity, and to enter reason for the return in the description, e.g. damaged items. Update the information and click ***"Save"*** to save the changes. Click ***"Enter"*** or  button if the user edited the products' information in "***Items/Articles***" tab.

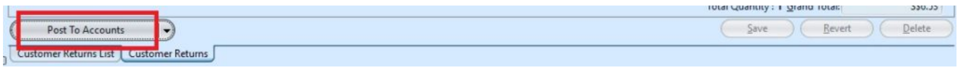


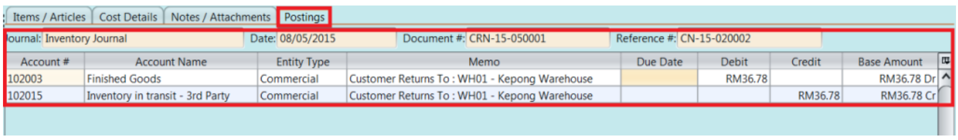
3. User may add “***Duty***” and/or “***Transport***” fees in “***Cost Details***” tab

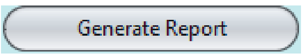
4. Click on ***“Notes / Attachments”*** tab at the middle of screen to add notes or files attachment for the customer return.

5. Click on ***“Confirm Customer Returns”*** button at the bottom of screen to confirm the customer return

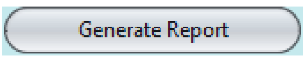
6. Click on ***“Post Customer Returns”*** button at the bottom of screen to post the customer return. After posting of the customer return, inventory journal entries will be automatically generated at the ***“Postings”*** tab.





7. Click on 

button to generate report for the customer returns

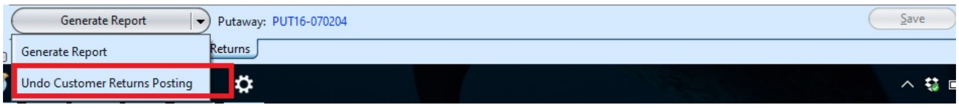
8. The putaway for the items will be automatically generate after posting of the customer returns. Click on the ***“Putaway”*** link beside the 

button to view the putaway document & process it.

Update Customer Returns

1. Click on ***"Customer Returns List"*** tab at the bottom of screen

2. Double click on customer return to be updated, it will bring up the details on ***"Customer Returns"*** tab for the selected document. If the customer returns's status is ***"Confirmed"*** or ***"Posted"***, click arrow on "***Generate Report***" button and select option ***"Undo/Reopen Customer Returns"*** at the bottom of screen and reopen / undo approval of the document first



3. Make change(s) on the customer return information

4. Click on ***"Save"*** button at the bottom right of screen when done

5. Click on ***"Revert"*** button at the bottom right of screen or refresh icon at the top of the screen to roll back the changes

6. Click on ***"Confirm Customer Returns"*** button at the bottom of screen to confirm the customer return

7. Click on ***"Post Customer Returns"*** button at the bottom of screen to post the customer return.

Delete Customer Returns

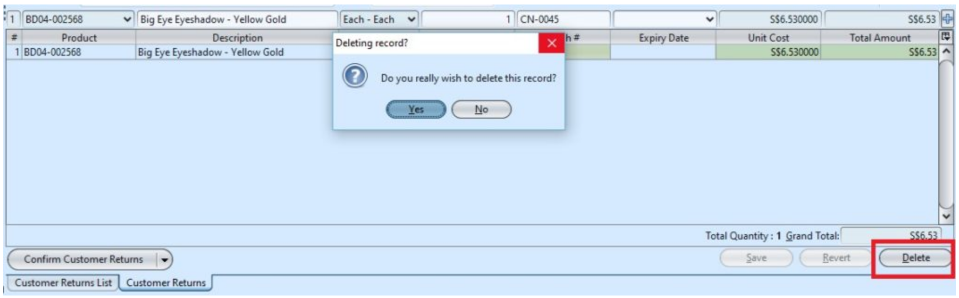
1. Click on ***"Customer Returns List"*** tab at the bottom of screen

2. Double click on customer return to be deleted, it

will bring up the details on ***“Customer Returns”*** tab for the selected document. If the customer return’s status is ***“Confirmed”*** or ***“posted”***, click arrow on “***Generate Report***” button and select option ***“Undo/Reopen Customer Returns”*** at the bottom of screen and reopen / undo approval of the document first

3. Click on ***“Delete”*** button at the bottom right side of screen

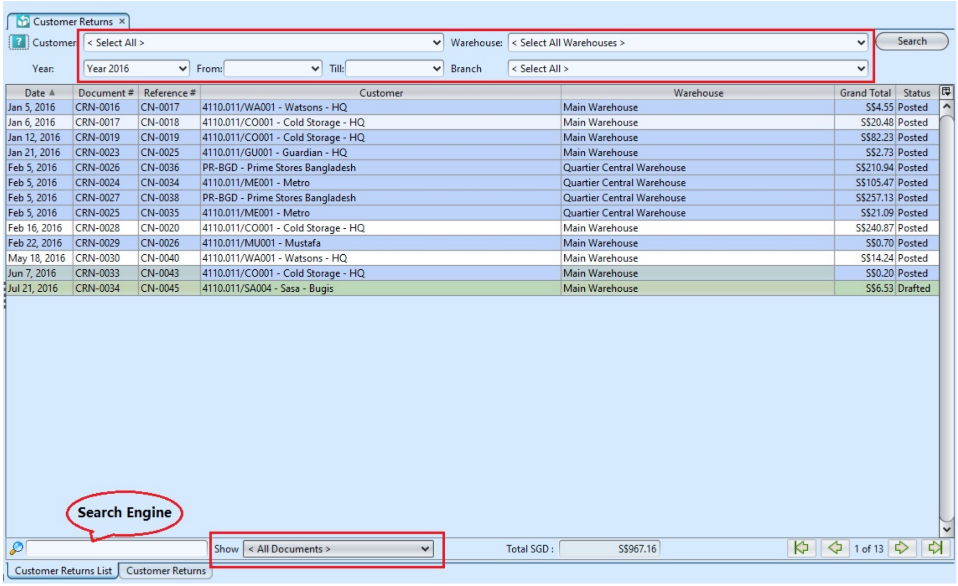
4. Click on ***“Yes”*** button on the pop-up window to confirm customer return deletion



View and Search for Customer Returns

1. Click on ***“Customer Returns List”*** tab at the bottom of screen

2. Enter search parameter to filter the result, i.e. type in which warehouse name to search for in the “Warehouse” text field box or select from drop-down list



3. Result can be sorted alphabetically by clicking the fields’ columns.

4. Double click on customer return to view full details of the document, it will bring up the details on ***“Customer Returns“*** tab for the selected document