

Direct Sales Return

Module Guide: Direct Selling Sales Return

Module Location

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Module Objective

The **Direct Selling Sales Return** module is used to record and manage the process of goods returns that originate from the direct selling channel. The document created here becomes the basis for the process of adjusting the inventory stock that returns from the field and for issuing related financial documents (such as a Credit Note).

1. Main View (Return List)

The main page of this module displays a list of all Direct Selling Sales Return documents that have been created.

The screenshot shows the main view of the Direct Selling Sales Return module. The interface includes a header with the breadcrumb 'Direct Selling | Sales Return | Sales Return'. Below the header, there are search and filter options: 'Sales Return Number' with a dropdown menu set to 'NONE', a 'Search' button, and a 'Show All' button. There are also filters for 'Item Category' (set to 'FINISHED GOOD'), 'Date From' (set to '1 August 2025'), and 'Date To' (set to '31 August 2025'). On the right side, there are 'Document Filter Status' and 'Approval Filter Status' sections. Below these filters, there is a table with the following columns: 'No.', 'Sales Return Number', 'Customer', 'Sales Order Number', 'Delivery Order Number', 'Sales Return Date', 'Sales Return Status', and 'Approval'. The table currently displays '...: No Record Found :...'. At the bottom of the interface, there are three buttons: 'New Sales Return', 'Return Note', and 'Delete'.

View Explanation & Filters

This page is for viewing and managing all return transactions from direct sales.

- **Filters:** You can search for a specific return by **Sales Return Number**, **Item Category**, or a date range (**Date From / Date To**).
- **Return List:** The table below will display all returns that match the filters, with columns such as **Sales Return Number**, **Customer**, **Sales Order Number**, and **Sales Return Status**.

Button Functions

- **New Sales Return:** The primary button to create a new Direct Selling Sales Return record.
- **Return Note:** Likely for printing a return note.
- **Delete:** To delete a return document.

2. Steps to Record a Direct Selling Sales Return

Step 1: Create a New Return Record


From the Main View, click the **New Sales Return** button to open the **Add Sales Return** form. 

Step 2: Fill in Header Information

On the form that appears, fill in the general information about the return:

- **Sales Return Date:** Enter the date the returned goods were received.

Sales Return Date *

: 

- **Customer:** Select the customer who is making the return.

Customer * :

- **Shipment Note Number: Important!** Select the original Delivery Order (Shipment Note) number from the direct selling transaction being returned. This will be the basis for validating the return.

Shipment Note Number * :

- **Warehouse:** Specify the destination warehouse where the returned goods will be received.

Warehouse * :

Step 3: Detail the Returned Items

In the detail table at the bottom, list the products that were returned:

- Enter the **Item** (Item Code) and **Qty** (Quantity) returned by the customer.
- Select a **Select Bin** location in the warehouse if required.

Step 4: Save and Confirm

After all data is filled in, use the buttons in the bottom-left section:

- **Save:** To save the return document as a draft.
- **Confirm:** To finalize the return document and send it into the approval workflow.
- **Cancel:** To cancel the entry.

Workflow & Integrated Business Process

- A Direct Selling Sales Return document that has been **Confirmed** will go to the **Direct Selling Sales Return Inbox** to be approved.
- After approval, this return becomes the basis for a stock adjustment and the creation of a **Credit Note**, if needed, to reduce the customer's bill.

Tips & Important Notes

- Always link a return with the original **Shipment Note Number** to ensure accurate history tracking.
- Use the **Notes** column to record the condition of the returned goods or the reason for the return as material for evaluation.

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