

Sales Return Inbox

Module Guide: Sales Return Inbox

Module Location

Sales > Sales Return > Sales Return Inbox

Module Objective

The **Sales Return Inbox** module serves as the approval center for all **Sales Return** documents that have been created and submitted. This module is used by a superior or manager who is authorized to conduct a review and provide approval before the return process can proceed to the next stage, such as the creation of a Credit Note.

1. Main View (Return List)

The main page of this module is an "inbox" that displays all Sales Return documents requiring your action.

The screenshot displays the 'Sales Return Inbox' interface. At the top, there is a breadcrumb trail: 'Sales | Sales Return | Sales Return Inbox'. Below this, there are several filter sections: 'Sales Return Number' with a dropdown menu set to 'Any Part of Field' and a search box; 'Item Category' with a dropdown menu set to 'FINISHED GOOD'; and 'Date From' and 'Date To' both set to '1 August 2025' and '31 August 2025' respectively, with a search button. On the right, there are two filter status boxes: 'Document Filter Status' and 'Approval Filter Status', each containing icons for different filter types. Below the filters, there is a table header with columns: 'No.', 'Sales Return Number', 'Customer', 'Sales Return Date', 'Sales Return Status', 'Approval', 'Approved Date', and 'R'. The table body is empty, and a message '...: No Record Found :...' is displayed. At the bottom left, there is an 'Approve' button. The page number 'Page : 0 Of 0' is shown at the bottom right.

View Explanation & Filters

This page provides a summary of all returns that are awaiting approval.

- **Filters:** You can search for a specific return by **Sales Return Number**, **Item Category**, or a **Date From** and **Date To** range.
- **Request List:** The table below will display all returns awaiting action. The table currently shows "...No Record Found...".

Column Explanation

- **Sales Return Number:** The unique number of the submitted Sales Return document.
- **Customer:** The name of the customer making the return.
- **Sales Return Date:** The date the return document was created.
- **Sales Return Status / Approval:** Icons that indicate the document's status and the approval process status.

Button Functions

- **Approve:** The main action button to approve one or more selected sales returns.

2. Approval Process Steps

The following is the standard workflow for an approver.

Step 1: Access the Inbox


Open the **Sales Return Inbox** module to see the list of returns that require approval.

Step 2: Review the Return Details

Click on one of the rows in the table to open its detail view. In the detail view, you can check all the information that has been input, such as the details of the returned products, the quantity, and the reason for the return.

Step 3: Provide Approval

After you have reviewed and are certain about the submitted return data:

1. Return to the main **Inbox** page.
2. Check the box in the leftmost column for one or more return rows you wish to approve.
3. Click the **Approve** button located in the bottom-left section of the page to process the approval. 

3. Workflow & Integrated Business Process

1. **Submission:** A user (e.g., a sales admin) creates a document in the **Sales Return** module and clicks **Confirm**.
2. **Entering the Queue:** The confirmed return automatically enters the queue in this **Sales Return Inbox** module.
3. **Review & Approval:** A manager or approver opens this module, reviews, and provides approval.
4. **Further Processing:** After approval, the return document becomes the valid basis for the **Accounting team to issue a Credit Note** and for the **Warehouse team to officially readjust the inventory stock**.

Updated 6 August 2025 09:11:11 by Muhammad Ali Akbar