

Sales Return Report

Sales Return Reports

This section covers reports related to the process of returns or the sending back of goods from customers.

Report Module Guide: Sales Return Report

Module Location

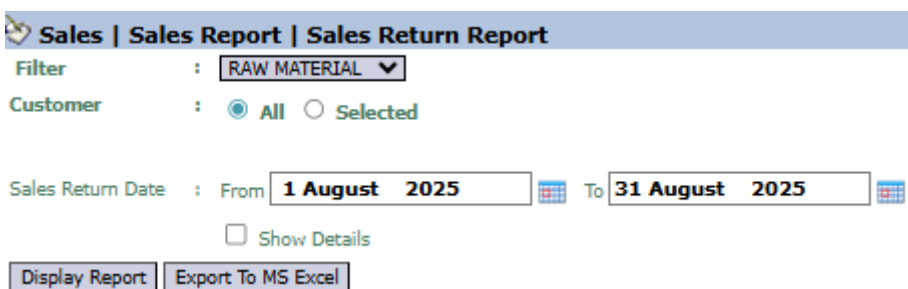
Sales > Reports > Return Reports > Sales Return Report

Module Objective

The **Sales Return Report** module is used to generate a detailed list of all return transactions or goods returns made by customers within a specific period. This report is used to monitor, summarize, and analyze sales return activities.

1. Report Parameters (Filter)

The main page of this module is a form containing various parameters to customize the report that will be generated.



The screenshot shows the top part of the report form. It has a breadcrumb trail: Sales | Sales Report | Sales Return Report. Below this, there are several filter options: a 'Filter' dropdown menu set to 'RAW MATERIAL', a 'Customer' section with radio buttons for 'All' (selected) and 'Selected', and a 'Sales Return Date' section with 'From' and 'To' date pickers set to '1 August 2025' and '31 August 2025' respectively. There is also a checkbox for 'Show Details' which is currently unchecked. At the bottom of the form are two buttons: 'Display Report' and 'Export To MS Excel'.

Here is an explanation for each parameter:

- **Filter:**

- Use this dropdown to filter the report by the category of the returned product (e.g., RAW MATERIAL).

- **Customer:**

- Select the customer scope for the report: **All** or **Selected** (Specific Customer).

- **Sales Return Date:**

- Specify the **From** and **To** date range to define the period of returns to be displayed (e.g., August 1, 2025, to August 31, 2025).

- **Show Details:**

- Check this box if you want to get a report with more complete details.

2. Steps to Generate the Report

Step 1: Set Report Parameters

Select all the parameters you need, especially defining the **Sales Return Date** range. 

Step 2: Generate the Report

After all parameters are set, click one of the two buttons in the bottom-left section of the page:

- **Display Report:** To preview the return report directly on your screen.

Display Report

- **Export To MS Excel:** To download the report data in an Excel file format.

Export To MS Excel

3. Example of the Report View

After you click, the system will generate a detailed report like the following, which details every return transaction.

Report Explanation: This report will display a list of all sales return documents.

Key Columns:

- **Sales Return Number:** The reference number of the return document.
- **Sales Return Date:** The date the return occurred.
- **Customer:** The name of the customer who made the return.
- **Shipment Note** and **Sales Order:** Reference document numbers from the original sales transaction.

Tips & Important Notes

- Use this report to **analyze return trends**, for example, to find out which products or customers have the most frequent returns.

- This report is a recapitulation of the data input in the **Sales Return** module. Ensure all return data has been recorded correctly.
- This report is useful for the **Quality Assurance, Sales, and Warehouse teams** for further investigation into the causes of returns and for process improvement.

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