9.02. Receiving goods back from a customer

It is important to be able to receive goods back from a customer without it being counted as goods coming from a supplier. If your customer issues the goods to you on a Customer Invoice, and you then receive it through a Supplier Invoice, then those goods will be counted as part of your store's 'supply' from suppliers, which is not correct. A Customer credit is the right way to receive goods back from a customer.

If you have accidentally confirmed (and finalised) a Customer Invoice, then you should be able to cancel it to bring the stock back in.

If one of your customers wishes to return goods to you, you should receive them back into your store using a customer credit transaction.

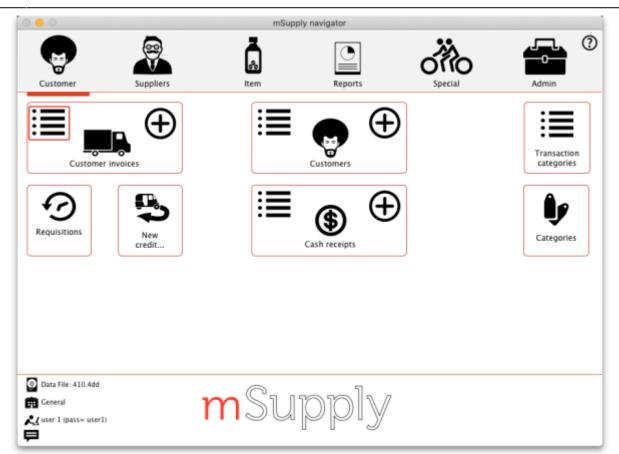
You can create a customer credit manually or it can be created automatically in your store if your customer is a store in mSupply and they create a supplier credit to return the goods to you - refer Return goods to a supplier.

Customer credits created automatically will have status = nw and placed on hold so that they do not affect stock in your store. When the goods physically arrive at your store, you can check them over, verify quantities, batches, condition, etc., make any necessary adjustments to the customer credit before taking it off hold and receiving the returned goods in to stock in mSupply.

Viewing and editing customer credits

Choose *Customer > Show invoices...* from the menu or click on the Show customer invoices icon on the Customers tab of the navigator:

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This will show you the search filter window:

Customer tran	sactions 📀
15 m	ost recent transactions, or:
nvoice Number 🗧 equals	•
Use list view	if one entry found
Complex Find	Cancel Find

Note that the drop down list at the top is set to Customer transactions. Edit the other filter selections as required (leave the top drop down list as it is) and click on the OK button to see a list of all customer transactions (invoices, credits etc.). The customer credits are the ones with "cc" in the Type column:

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Find	Sum	Order by	Export to Excel	Finalise	1	Juplicat	te (ancel	Filters	Custo	mise	Modify	Export to MYOB		
Types			Name					Confirmed	Invour		Total	Their ref	Pickslip pri	Comment	Expor
Customer in	rivaices	Test store			_			13/0020		2	-6				0
Supplier in	voices	Test store	01		ci	fn	13/002	13/0020		1	63.6				0
Inventory a	djustments														
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Customer o										_					
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Repacks										-	_				
Find															
By date															
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Double click on any transaction in the list to view or edit it.

Creating customer credits

Choose **Customer > New credit...** from the menu bar or click on the *New credit...* icon on the Customer tab of the navigator to open this window:

(Customer Cre	edit			-
Name	Confirm date	00/00/00		Colour :	Black
heir ref				Invoice : 0	
mment 📕	Category	None	•	Entry date : 30/03/20	015
				Goods receive ID : 0 Status : nw	
		-		Entered by : sussol	
line Delete line(s)		1		Store : General	
line Delete line(s) al Summary by Item Summary by Batch Transport details Log		History			
Summary by item Summary by Batch Iransport details Log					
Location Item Name Qu	an Pack Size	Batch Exp	date Sell Price	Price exten	
					^
👔 🛐 🚺 Other charges 🛛 🕅	tem:			Amount:	0.0
				Subtotal:	0.0
				0 % tax:	0.0
				Total:	0.0
á lize Export batch: 0		(DK & Next	Total: Delete OK	

Enter the name of the customer you are receiving the goods from in the *Name* field by typing the first

few characters of the name and pressing the Tab key on the keyboard to select it. Enter a reference and comment in the *Their ref* and *Comment* fields if required then click on the *New line* button to add a line to the credit:

	Add/edit supplier invoice line
0	Sent quantity 0
1	
0	_
	Location
00/00/00	Volume per pack m3 🛐
0.00	Adjusted local cost % Margin Sell price
0.00	
	Cancel OK OK & Next
	0 1 0 00/00/00 📰 0.00

Here you can enter the details of the first batch you are receiving. This is exactly the same as filling out the details for a supplier invoice line. Enter the name of the item first by typing the first few characters of the name or code then press the tab key to select the right item. Now enter the rest of the details as required, to match the stock being returned.

Note that on the customer credit you should enter items with zero margin. This is because *mSupply* uses the cost price entered to calculate the amount to credit the customer, so you must enter the amount you charged them as the cost price for each line. Presumably you want to sell the item again for the same price you sold it originally, hence the cost and selling price should be the same.

When you have finished entering this line's details, click on the *OK* button if you're finished or the *OK* & *Next* button to add another line. When you've finished adding lines you'll be back at the customer credit window:

							Cust	omer credit						
2	Name	Test cust	omer 01	[1	Confirm	date :	00/00/00				Colour		Black
Th	eir ref			testc01								Invoice :	3	
Cor	nment			6	1	Cate	egory	None		0		Entry date :	13/03/2020)
					-						Goods	received ID :	0	
-			_	_				-				Status :	πw	
÷	5		_					•				Entered by :	user 1 (pass	= user1)
New I	ine		Delete	line(s)				Histor	¥			Store :	General	
				General	Summa	ry by Item	Sur	mary by Batch	Transp	ort details	Lon			
Notar	Line	Location	Item code	General	Item		3011	mary by batch		Pack Size	Batch	Exp date	Sall Brice	Price exten
TRUCES	1	cocarron	PARSOOT	Paracetamol 500mg T		Tarre .			15			31/08/2021		-30.00
	2		AMO500T	Amoxycillin 500mg Ca					200	1	RTYU890	30/09/2022	1.40	-280.00
														_
	_													_
. (i 😬		Other cha	arges	Item:						An	ount:	0.00
												Sul	ototal:	-310.00
													% tax:	0.00
													Total:	-310.00
Hold										~~~	a Meet	Delete	0	
Final	ise		Export batch: 0							UK.	& Next	Cremente	0	

Click on the *OK* button to save the customer credit. This will automatically confirm it and put the items on it into your stock in mSupply.

There is no need to enter negative values for quantities or prices in mSupply. Even when you are entering returned goods from customers, or returning goods to suppliers, enter positive values. mSupply automatically converts the amounts to negative values as required to keep all the figures in correct balance.

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