CUSTOMER RETURN DASHBOARD – INFORMATION SHEET

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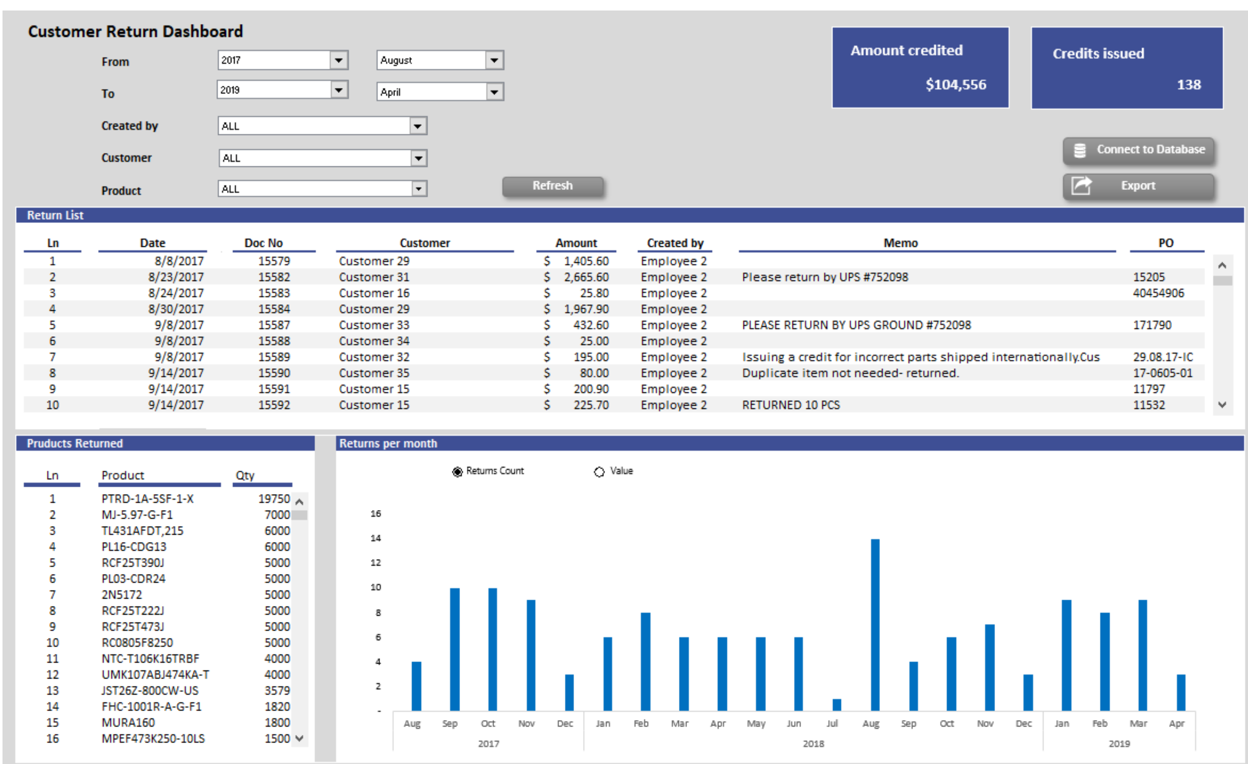
WHAT IS IT?

Customer Return Dashboard is an excel macro-enabled workbook that helps you to display and easily analyze customer returns for your business. It enables displaying data for particular period for your entire business or filter it by user, particular customer or product. It summarizes number of returns, their dollar amount and quantity of each product returned. The dashboard can process manually added data or can be connected directly to you server and display data in real time which makes it very powerful tool!



KnowYour Numbers

WHY DO I NEED IT?

Customer Return Dashboard is a control tool used to track returns processed by sales department. It enables management to see and analyze customer return trends and return reasons. This knowledge is very useful as it helps to detect issues like product flaws or employees' mistakes. It also enables you to generate reports that can be used in meetings with your staff and customers.

If your company tracks and analyzes returns, this tool will bring you a lot of time savings. There is no need to manually extract data and prepare the report from scratch every time! This makes your reporting faster, more stadarized and consistent. If your business carries physical products but you do not analyze returns, this might be a perfect addition that will help you gain valuable insights into your business.

WHAT DATA DO I NEED TO USE IT?

There is only 4 mandatory data fields that you will need from your accounting / CRM software:

- Transaction Number (Credit Memo/RMA number)
- Transaction Date
- Item Quantity
- Item Price (Unit Price x Quantity)

Note that the more data you add, the more insaigthful your analysis will be. Optional data include:

- User name
- Customer Name
- Item Name
- Customer PO#
- Memo/Notes

HOW DOES IT WORK?

Connect to data:

There are two ways of loading data into the tool:

1. Paste all mandatory data into 'Data' tab. Note that column headers need to stay the same!
2. Establish connection to your server which will enable you to display live data.

Report generation:

1. Click ***Connect to Database*** button in order to refersh connection to your server and capture new data. If you add data manually, click this button every time you add or alter data in ***Data*** tab.
2. Use drop down filters to display data that you need. Click ***Refresh*** button.
3. Data has been displayed for chosen selection!
4. Click **Export** button and chose your option (Excel / PDF) to export your report.

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CONTACT

More questions? Contact us: contact@kynaccounting.com