

## 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!

**Customer Return Dashboard**

From: 2017 August

To: 2018 April

Created by: ALL

Customer: ALL

Product: ALL

[Refresh](#)

**Amount credited**  
\$104,556

**Credits issued**  
138

[Connect to Database](#)  
[Export](#)

**Return List**

Ln	Date	Doc No	Customer	Amount	Created by	Memo	PO
1	8/8/2017	15579	Customer 29	\$ 1,405.60	Employee 2		
2	8/23/2017	15582	Customer 31	\$ 2,665.60	Employee 2	Please return by UPS #752098	15205
3	8/24/2017	15583	Customer 16	\$ 25.80	Employee 2		40454906
4	8/30/2017	15584	Customer 29	\$ 1,967.90	Employee 2		
5	9/8/2017	15587	Customer 33	\$ 432.60	Employee 2	PLEASE RETURN BY UPS GROUND #752098	171790
6	9/8/2017	15588	Customer 34	\$ 25.00	Employee 2		
7	9/8/2017	15589	Customer 32	\$ 195.00	Employee 2	Issuing a credit for incorrect parts shipped internationally.Cus	29.08.17-IC
8	9/14/2017	15590	Customer 35	\$ 80.00	Employee 2	Duplicate item not needed- returned.	17-0605-01
9	9/14/2017	15591	Customer 15	\$ 200.90	Employee 2		11797
10	9/14/2017	15592	Customer 15	\$ 225.70	Employee 2	RETURNED 10 PCS	11532

**Products Returned**

Ln	Product	Qty
1	PTRD-1A-55F-1-X	19750
2	MJ-5.97-G-F1	7000
3	TL431AFDT,215	6000
4	PL16-CDG13	6000
5	RCF25T390J	5000
6	PL03-CDR24	5000
7	2N5172	5000
8	RCF25T222J	5000
9	RCF25T473J	5000
10	RC0805F8250	5000
11	NTC-T106K16TRBF	4000
12	UMK107ABJ474KA-T	4000
13	JST26Z-800CW-US	3579
14	FHC-1001R-A-G-F1	1820
15	MURA160	1800
16	MPEF473K250-10LS	1500

**Returns per month**

Legend: Returns Count (blue bars), Value (grey line)

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## 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 standardized 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 insightful 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 refresh 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 choose your option (Excel / PDF) to export your report.

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WATCH A VIDEO

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DEMO DOWNLOAD

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## CONTACT

More questions? Contact us: [contact@kynaccounting.com](mailto:contact@kynaccounting.com)