

# Sage 200 Technical Tip

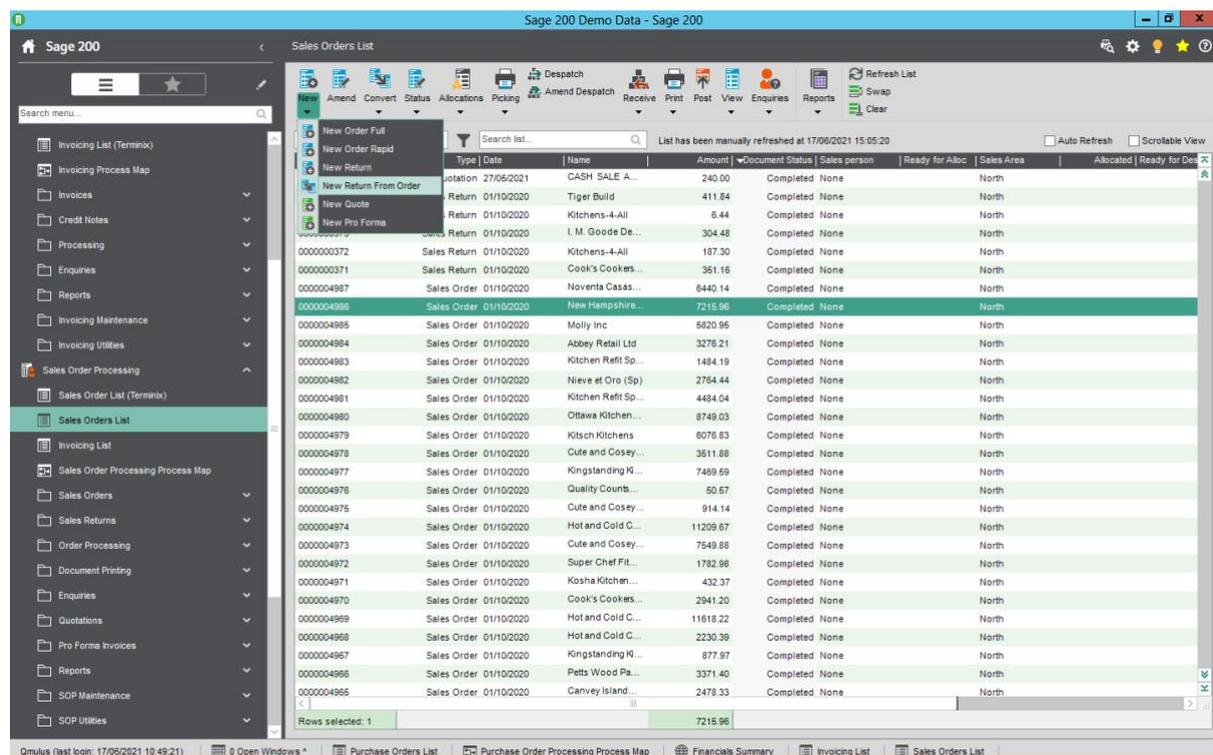
## Creating a Sales Return from a Sales Order

Following a structured Returns process is an important step for any business that sells products or services.

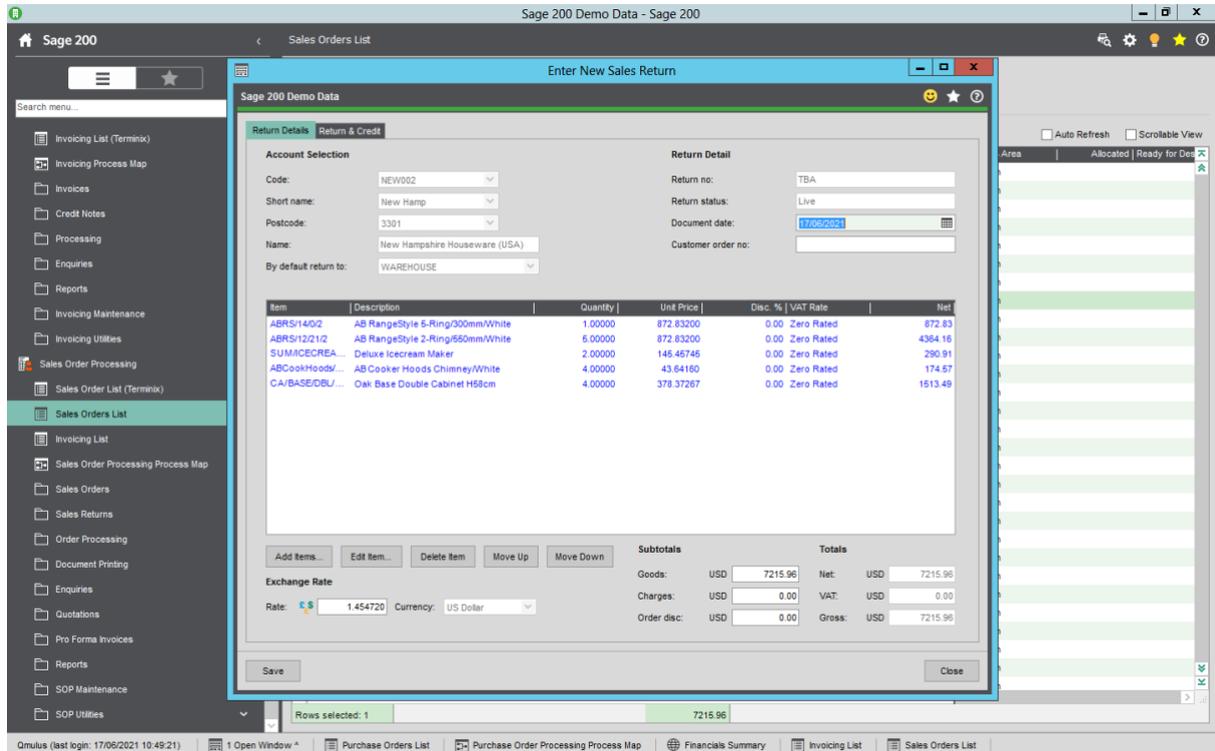
Sage 200 provides a Returns Note procedure that follows a process from New Return Note and Receiving the Returned Goods through to creating the Credit Note and allocating the returned products back into stock (ideally into a Returns or Quarantine warehouse).

You have always been able to create a New Returns Note and manually enter the products or services that need to be returned, but a function that is not widely used is to create a New Return from an existing Sales Order (almost like a copy facility).

From the Sales Order List, highlight the correct order and then choose New from the top menu and then choose New Return From Order:-

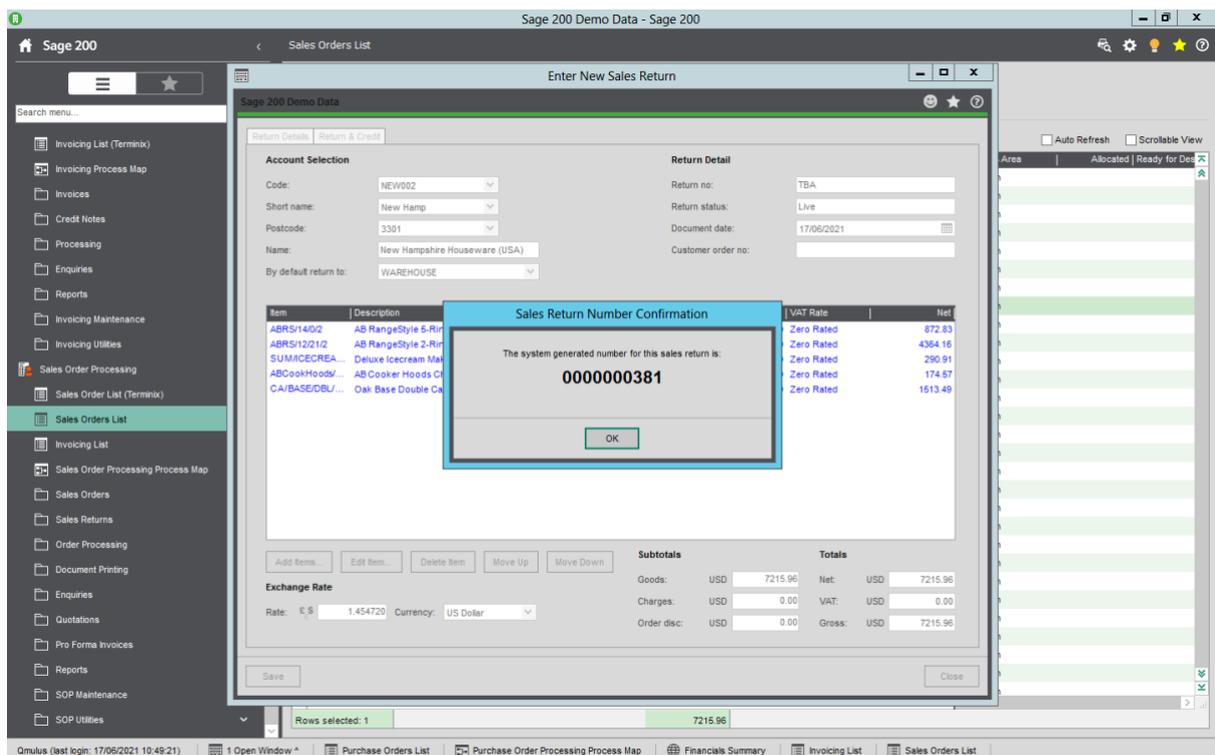


The next screen will show a New Return but with all the items, prices and quantities from the selected order:-



At this point, you can then add, edit or delete items on the Return Note and change prices or quantities until you arrive at the correct details for the Return.

Then press Save and the next screen will give you the next Returns Note Number



The new Return Note will now be available in the SOP List view and can then be processed as normal through to the Credit Note stage and then posted.

The screenshot displays the Sage 200 interface for the 'Sales Orders List' view. The application title bar reads 'Sage 200 Demo Data - Sage 200'. The left-hand navigation pane shows various menu items, with 'Sales Orders List' selected. The main window features a toolbar with icons for 'New', 'Amend', 'Convert', 'Status', 'Allocations', 'Picking', 'Despatch', 'Amend Despatch', 'Receive', 'Print', 'Post', 'View', 'Enquiries', 'Reports', 'Refresh List', 'Swap', and 'Clear'. Below the toolbar is a search bar and a status message: 'List has been manually refreshed at 17/09/2021 15:23:42'. The central area contains a table of sales orders. The first row is highlighted in red, indicating a new return note. The table columns include 'No', 'Type', 'Date', 'Name', 'Amount', 'Document Status', 'Sales person', 'Ready for Alloc', 'Sales Area', 'Allocated', and 'Ready for Despatch'. The bottom status bar shows 'Rows selected: 1' and a total amount of '7215.96'. The taskbar at the bottom indicates the user is logged in as 'Omulus' at '17/09/2021 10:49:21' and has several open windows.

No	Type	Date	Name	Amount	Document Status	Sales person	Ready for Alloc	Sales Area	Allocated	Ready for Despatch
0000000381	Sales Return	17/09/2021	New Hampshire...	7215.96	Live	None		North		Yes
0000000379	Sales Return	08/10/2020	Molly Inc	237.60	On hold	None		North		Yes
0000000378	Sales Return	08/10/2020	W. Baldslow (B...	108.00	Live	None		North		Yes
0000000377	Sales Return	08/10/2020	Kitsch Kitchens	484.44	On hold	None		North		Yes
0000000376	Sales Return	08/10/2020	Hot and Cold C...	1079.93	Live	None		North		Yes
0000000375	Sales Return	08/10/2020	Kitsch Kitchens	369.98	On hold	None		North		Yes
0000000374	Sales Return	01/10/2020	Tiger Build	411.84	Completed	None		North		
0000000373	Sales Return	01/10/2020	Kitchens-4-All	6.44	Completed	None		North		
0000000372	Sales Return	01/10/2020	I. M. Goode De...	304.48	Completed	None		North		
0000000371	Sales Return	01/10/2020	Kitchens-4-All	187.30	Completed	None		North		
0000000370	Sales Return	01/10/2020	Cook's Cooker...	361.16	Completed	None		North		
0000000369	Sales Return	24/09/2020	Petts Wood Pa...	239.98	Completed	None		North		
0000000368	Sales Return	24/09/2020	Lamb's Greeb...	205.33	Completed	None		North		
0000000367	Sales Return	24/09/2020	Halstead Home...	274.51	Completed	None		North		
0000000366	Sales Return	24/09/2020	Petts Wood Pa...	276.27	Completed	None		North		
0000000365	Sales Return	24/09/2020	Kingstanding K...	1404.76	Completed	None		North		
0000000364	Sales Return	24/09/2020	Canvey Island...	175.59	Completed	None		North		
0000000363	Sales Return	24/09/2020	Kitchens-4-All	361.16	Completed	None		North		
0000000362	Sales Return	17/09/2020	Halstead Home...	1404.66	Completed	None		North		
0000000361	Sales Return	17/09/2020	James B Backly...	239.98	Completed	None		North		
0000000360	Sales Return	17/09/2020	All Things Black...	239.98	Completed	None		North		
0000000359	Sales Return	17/09/2020	Cook's Cooker...	239.98	Completed	None		North		
0000000358	Sales Return	17/09/2020	Quality Counts...	479.96	Completed	None		North		
0000000357	Sales Return	17/09/2020	All Things Black...	25.75	Completed	None		North		
0000000356	Sales Return	17/09/2020	Petts Wood Pa...	140.48	Completed	None		North		
0000000355	Sales Return	17/09/2020	Shiny Things	72.00	On hold	None		North		Yes
0000000354	Sales Return	17/09/2020	Mike & Mickey's...	25.23	Completed	None		North		
0000000353	Sales Return	17/09/2020	A56 Plumbing	12.88	Completed	None		North		
0000000352	Sales Return	17/09/2020	Petts Wood Pa...	244.66	Completed	None		North		