

Sales returns and customer refunds

Selling and customers

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Sales returns and customer refunds

Handle goods a customer sends back, and credit or refund them correctly.

Intermediate · About 12 minutes · Version 1.0 · Updated 17 November 2026

Plan availability

Included in the **Kuza** and **Enterprise** plans. It is not part of **Biashara**. Contact us if you want to upgrade.

Overview

When a customer returns goods, two things must be recorded: the **goods coming back into stock** and the **money you no longer expect**. Hesabu ERP does this with a return document, linked to the original sale.

Steps

If goods were delivered with a Delivery Note

1. Open the submitted **Delivery Note**.
2. Click **Create**, then **Sales Return**.
3. Reduce the quantities to what actually came back. Choose the **Warehouse** it returns into.
4. Save and submit. Stock increases.
5. Then open the original **Sales Invoice** and click **Create**, then **Return / Credit Note** to reduce what the customer owes. See Credit notes and debit notes.

If the invoice updated stock itself

Create one **Return / Credit Note** from the invoice. The goods return to stock and the amount is credited in the same step.

Refund the money

1. If the customer already paid, open the credit note and click **Create**, then **Payment**.
2. Choose *Pay* as the type, enter the reference, and submit.

Practical example

Baraka Supplies returns 10 damaged iron sheets. The storekeeper receives them into a `Rejected - HD` warehouse using a Sales Return, so damaged goods do not go back on sale. The accountant

issues a credit note for KES 12,500.

Important notes

- Returns can only be made for items on the original document.
- Use a separate **Rejected** warehouse for damaged goods.

Common mistakes

- Creating only a credit note and forgetting the goods, so stock is wrong.
- Returning goods into the main warehouse when they are damaged.

Next steps

Move on to Buying.

Related documentation

- Credit notes and debit notes
- From quotation to payment
- Warehouses and stock entries