Finance - Sales Adjustment Collections

The **Sales Adjustment Collections Tab** in the ERP system allows users to manage and track the collections of sales adjustments. This feature provides detailed information regarding payment status, order quantities, and adjustments, ensuring that all sales transactions are correctly recorded and processed. This article will guide you through the key functions and features of the **Sales Adjustment Collections Tab**, helping you efficiently manage payment collections and adjustments.

How to Navigate to the Sales Adjustment Collections Section

To access the **Sales Adjustment Collections Tab**, follow these steps:

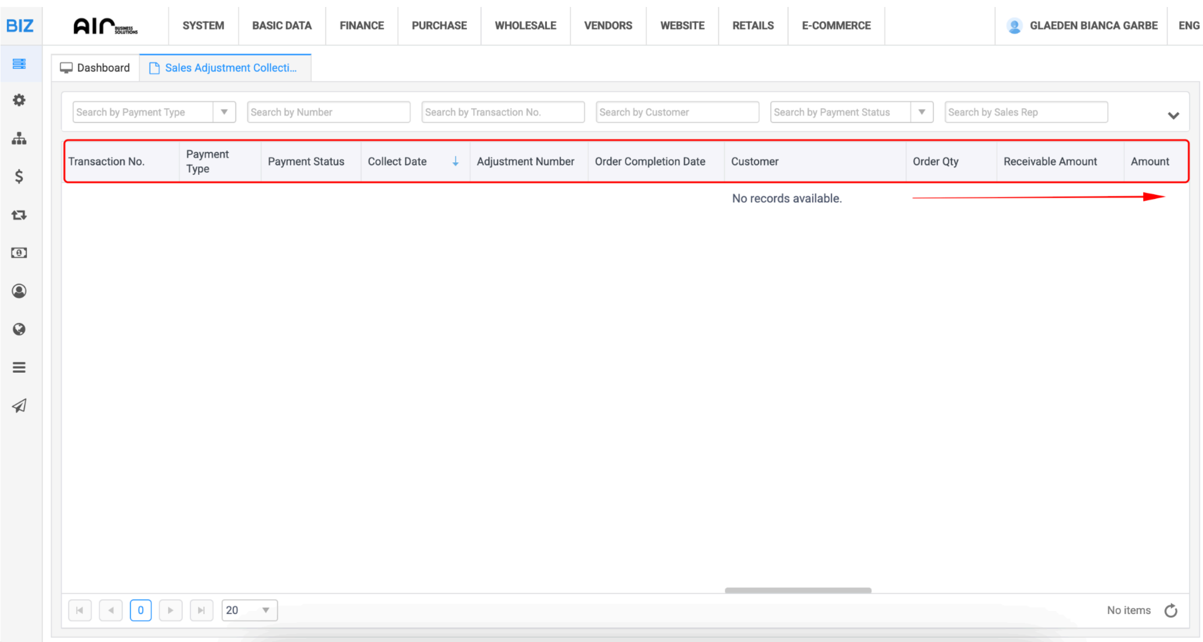
1. **Log in to the ERP System**: Open the ERP system and enter your credentials.

2. **Go to the Finance Tab**: Locate and click on the **Finance** tab in the main navigation menu.

3. **Select Sales Adjustment Collections**: Under the **Finance** section, click on **Sales Adjustment Collections** to view and manage related records.

Key Fields in the Sales Adjustment Collections Tab

The **Sales Adjustment Collections Tab** contains several important fields that allow you to track and manage sales adjustment collections efficiently. Here is a breakdown of the key fields:



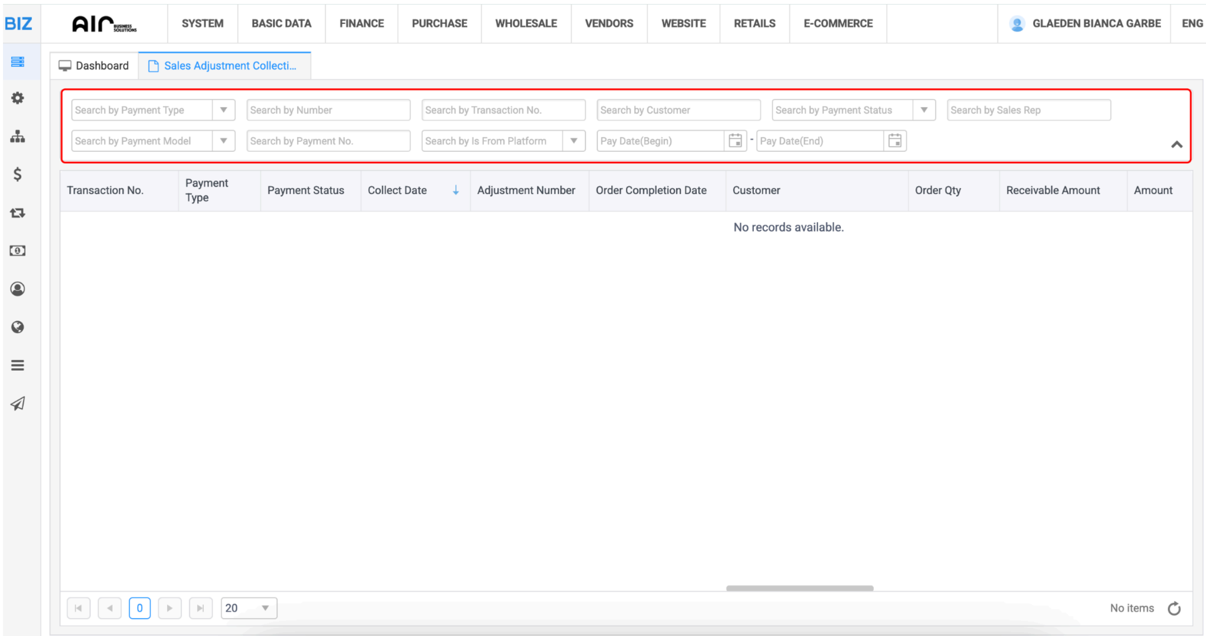
1. **Transaction No.**: The unique identifier for each sales adjustment transaction.
2. **Payment Type**: The method of payment used (e.g., Credit Card, Bank Transfer, Cash).
3. **Payment Status**: The current status of the payment (e.g., Paid, Pending, Overdue).
4. **Collect Date**: The date when the payment was collected or is due.
5. **Adjustment Number**: The unique identifier for the sales adjustment applied to the transaction.
6. **Order Completion Date**: The date when the order was completed and processed.
7. **Customer**: The name of the customer involved in the sales transaction.
8. **Order Qty**: The total quantity of items in the order.
9. **Receivable Amount**: The total amount that needs to be collected from the customer.
10. **Amount**: The total amount of the sales adjustment, including the original amount and any changes.
11. **GPR (Gross Profit Ratio)**: Indicates the profitability of the transaction based on the gross margin.
12. **Profit Amount**: The profit generated from the transaction after adjustments.
13. **Charge**: Any additional charges applied to the transaction.
14. **Discount**: The discount applied to the sales transaction.
15. **Tax Rate**: The applicable tax rate for the sales adjustment.
16. **Operator**: The person or system that processed the sales adjustment.
17. **Payment Mode**: The method used to pay (e.g., Wire Transfer, Check).

18. **Deposit Bank Account**: The bank account into which the payment was deposited.

19. **From Platform**: The platform or channel through which the transaction or order was placed (e.g., Website, Mobile App).

Search and Filter Options in the Sales Adjustment Collections Tab

The **Sales Adjustment Collections Tab** offers a range of search and filter options to help users quickly find specific transactions. These search options help to narrow down results and make managing records easier:



1. **Search by Payment Type**: Filter transactions based on the method of payment used (e.g., Credit Card, Cash).

2. **Search by Transaction No.**: Search for specific transactions using their unique identifier number.

3. **Search by Payment Status**: Filter transactions by their payment status (e.g., Paid, Pending).

4. **Search by Payment Mode**: Find transactions by the payment method used (e.g., Credit Card, Bank Transfer).

5. **Search by Is From Platform**: Filter transactions based on the platform from which the order was placed (e.g., Mobile, Website).

6. **Search by Number**: Search by the unique number assigned to the sales adjustment.
7. **Search by Customer**: Locate transactions related to a specific customer.
8. **Search by Sales Rep**: Filter by the assigned sales representative.
9. **Search by Payment No.**: Search for transactions using the payment number.
10. **Pay Date (Begin)**: Filter by the start date of the payment collection period.
11. **Pay Date (End)**: Filter by the end date of the payment collection period.

The **Sales Adjustment Collections Tab** is a critical tool for managing sales transactions and ensuring that adjustments and collections are properly tracked and processed. By understanding the key fields and utilizing the search and filter options, you can quickly locate relevant records, monitor payment statuses, and analyze profitability. This will streamline your workflow, reduce errors, and improve cash flow management. Regularly using this feature will help ensure that all adjustments are properly recorded and payments are collected in a timely manner.