

VERSION 1.0

NOVEMBER 23, 2017



SALES HISTORY TAB IN CUSTOMER MAINTENANCE

APP NUMBER: 010004

Powered by:

MYOB Greentree

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FEATURES

1. Sales History Tab in Customer Maintenance

Do you find it hard to know what products or services a customer has been buying from you other than having to drill into each invoice to see what is on it?

With this app, we have added a new "Sales History" tab to the Customer Maintenance and Enquiry screens, so that you can see what has been invoiced by product or service, rather than by invoice. If an item has been sold multiple times, a + appears and you can see when it was sold, how many were sold, and how much it was sold for.

IMPORTANT NOTES

- We recommend that you test the configuration of the App thoroughly in a test system prior to deploying the App in your live Greentree system.

OTHER REQUIREMENTS

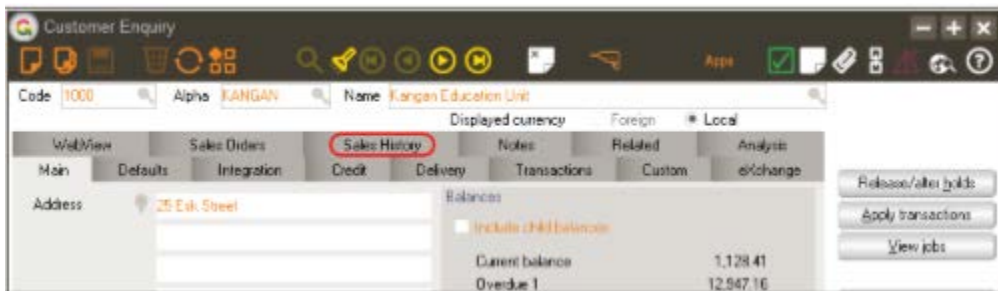
Greentree Modules: Accounts Receivable, Inventory

Associated Apps: None

USER INSTRUCTIONS

INSTRUCTIONS

1. Select the menu item | **Data Entry** | **Accounts Receivable** | **Customer Maintenance** | or the menu item | **Enquiry** | **Accounts Receivable** |
2. Select the customer to view in the usual manner using arrow keys, entering a Code, Alpha or Name, or using the Advanced Search
3. Click on the **Sales History** tab

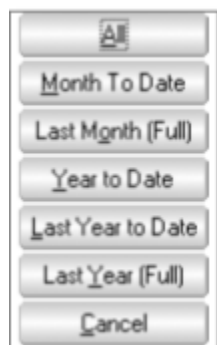


4. Refine your search by setting the **Selection Criteria**:

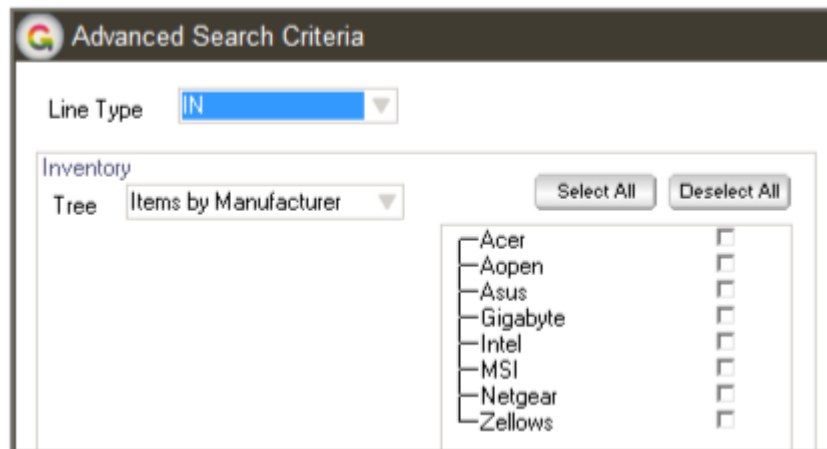
A screenshot of the 'Selection Criteria' dialog box. It contains fields for 'From' and 'To' dates, a 'Description Search' field, and a 'Salesperson' dropdown. The 'From' date is set to 1 / 1 / 1890 and the 'To' date is 31 / 12 / 2014. The 'Salesperson' is set to Sally Scoresby. There are buttons for 'Date >>', 'Advanced', and 'Search Now'. The 'Total' field shows 0.00. The dialog box is used to refine the search criteria for the Sales History tab.

Date

Click on the **Date** button to select from a number of predetermined periods, or specify **From** and **To** dates



Code From / To	Select based on all, one or a range of: GL accounts, Nonstock codes or Stock item codes
Salesperson	Select based on all, one or a range of Salespeople
Description Search	Search based on text in the description of a line type e.g. a word in the description of a Stock Item
Summary by Period	Click this radio button to view one summary line of data per period, per code, per salesperson, per branch, where the records returned meet the other selection criteria
Summary by Code	Click this radio button to view one line per code regardless of the salesperson, where the records returned meet the other selection criteria
Total	The total value of the selected records is shown in this box
Advanced	Click the Advanced button to open the Advanced Search Criteria window, where you may narrow the selection of records based on a Tree and its branches



5. Click the **Search now** button to show the records that match your selection criteria
6. Click the **+** to expand a record and show the Invoices that make it up

WebView		Sales Orders		Sales History		Notes		Related		Analysis	
Main		Defaults		Integration		Credit		Delivery		Transactions	
										Custom	

Selection Criteria

From: 1 / 1 / 2009 To: 31 / 12 / 2014

Date >> 1 / 1 / 2009 31 / 12 / 2014

Code: zzzzzzzzzz

Enter any number of words or partial words.

Salesperson: Sally Scoresby Steve Sampson

Summary by Period Summary by Code

Total: 71201.94

Advanced Search Now

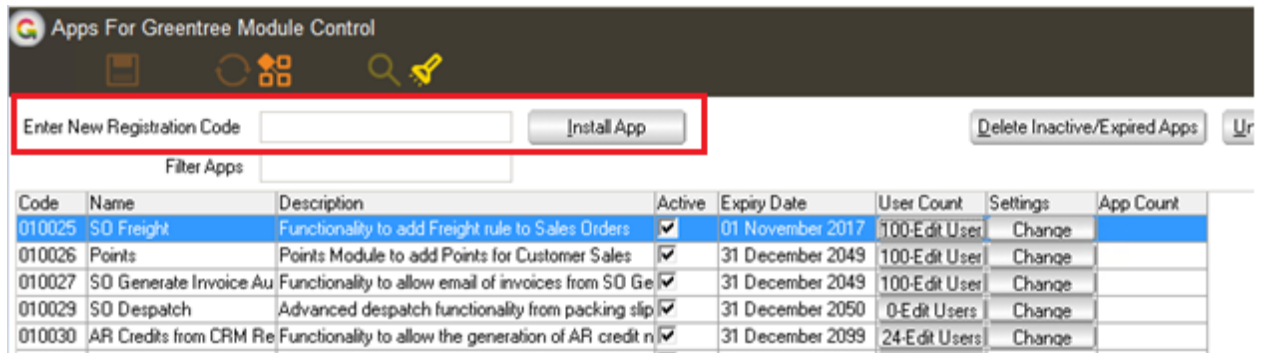
Date	Type	Code	Description	Salesperson	Branch	Quantity
	GL	01.01.1030	Service Income			0.00
30/4/2011	Inv	600014		Steve Sampson	02	0.00 1
30/4/2011	Inv	600015		Steve Sampson	02	0.00 1
	GL	01.01.1030	Support Income			0.00
	IN	00ADPEN17MONITO	ADpen 17" LCD Monitor			14.00
	IN	01ADPEN6248533	ADpen Dual Core Desktop			3.00

IMPLEMENTATION GUIDE

Please refer to the Important Notes section above before installing and configuring this App

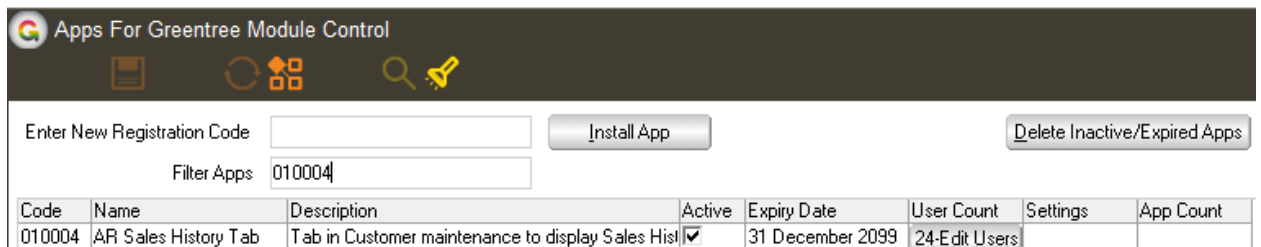
APP INSTALLATION

1. Log into Greentree as the **Super** user
2. Select the menu item | **System** | **Apps For Greentree** | **Apps Module Control** | 3.
Enter the New Registration Codes supplied and click Install App



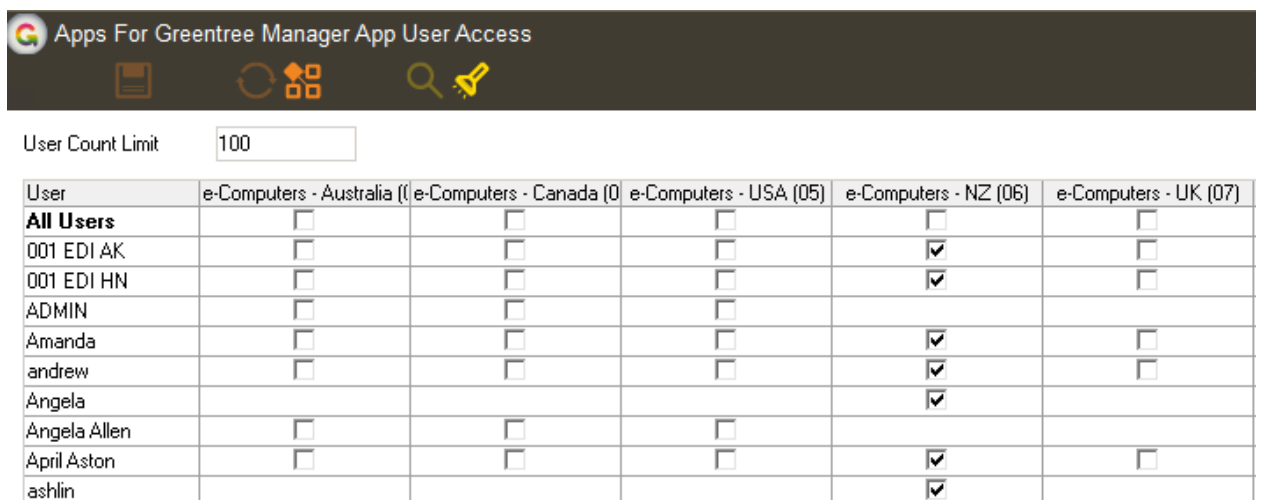
Code	Name	Description	Active	Expiry Date	User Count	Settings	App Count
010025	SD Freight	Functionality to add Freight rule to Sales Orders	<input checked="" type="checkbox"/>	01 November 2017	100-Edit User	Change	
010026	Points	Points Module to add Points for Customer Sales	<input checked="" type="checkbox"/>	31 December 2049	100-Edit User	Change	
010027	SD Generate Invoice Au	Functionality to allow email of invoices from SD Ge	<input checked="" type="checkbox"/>	31 December 2049	100-Edit User	Change	
010029	SD Despatch	Advanced despatch functionality from packing slip	<input checked="" type="checkbox"/>	31 December 2050	0-Edit Users	Change	
010030	AR Credits from CRM Re	Functionality to allow the generation of AR credit n	<input checked="" type="checkbox"/>	31 December 2099	24-Edit Users	Change	

4. Select/Highlight the **Sales History Tab in Customer Maintenance App**.



Code	Name	Description	Active	Expiry Date	User Count	Settings	App Count
010004	AR Sales History Tab	Tab in Customer maintenance to display Sales Hist	<input checked="" type="checkbox"/>	31 December 2099	24-Edit Users		

5. Click on the **Edit Users** button and select the users who will be configured to use Active Directory Integration, for which companies.



User	e-Computers - Australia (01)	e-Computers - Canada (02)	e-Computers - USA (05)	e-Computers - NZ (06)	e-Computers - UK (07)
All Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
001 EDI AK	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
001 EDI HN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ADMIN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Amanda	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
andrew	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Angela	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Angela Allen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
April Aston	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ashlin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

6. Once you have selected the users, **Save** the settings using the save icon in the header and **Close** the window.
7. **Save** and **Close** the form.