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

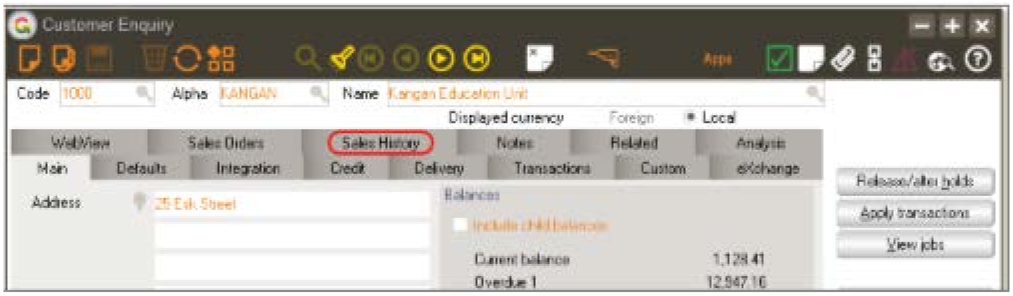
Greentree Modules: Accounts Receivable, Inventory

Associated Apps: None

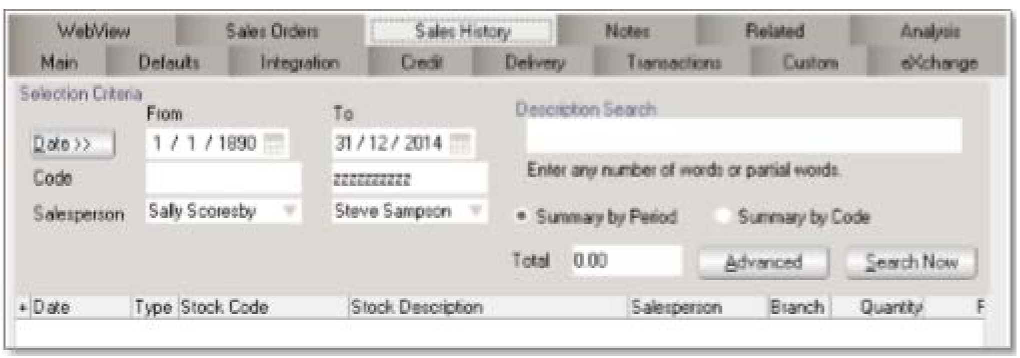
USER INSTRUCTIONS

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

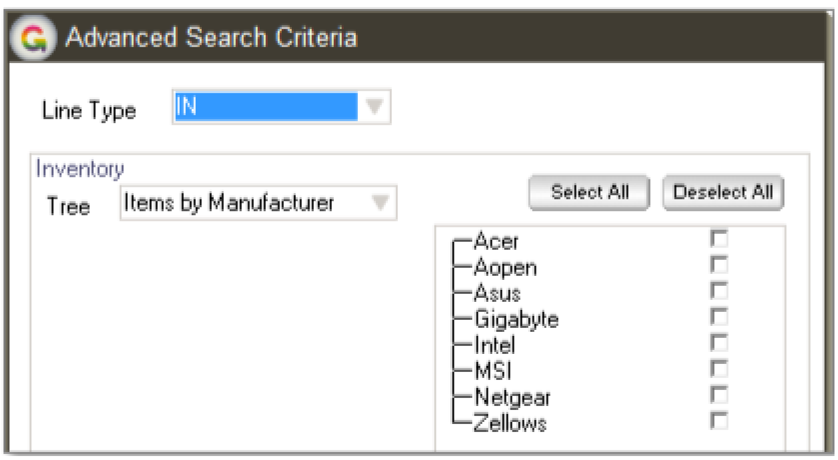


4. Refine your search by setting the Selection Criteria:

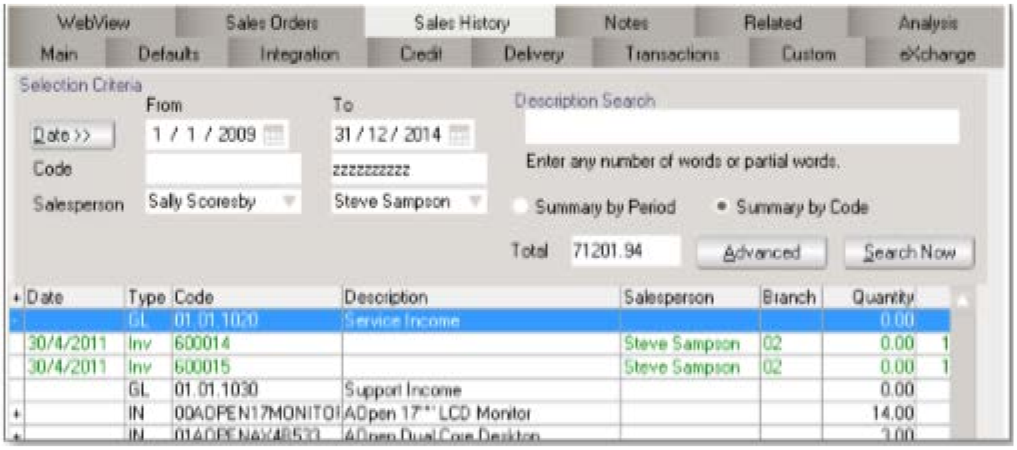


Date	Click on the Date button to select from a number of predetermined periods, or specify From and To dates

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

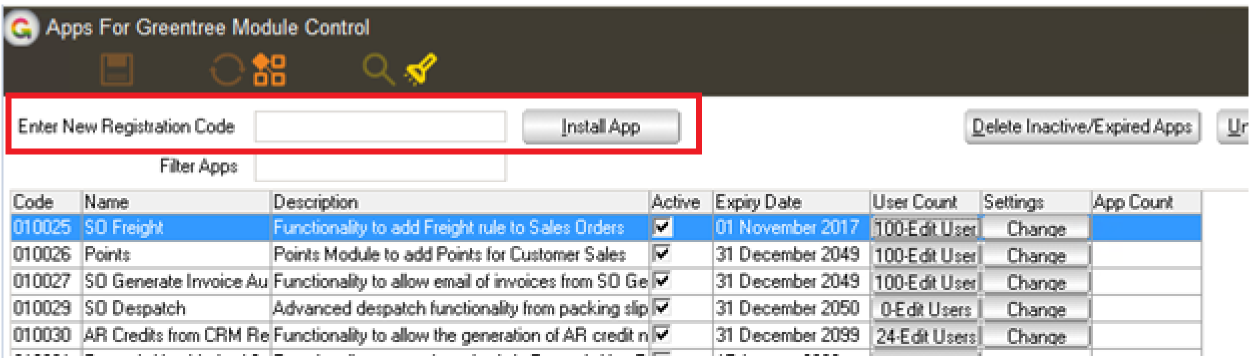

WebView
Sales Orders
Sales History
Notes
Related
Analysis
Main
Defaults
Integration
Credit
Delivery
Transactions
Custom
eXchange
Selection Criteria
From
To
Date >>
1 / 1 / 2009
31 / 12 / 2014
Code
zzzzzzzzzz
Salesperson
Sally Scoresby
Steve Sampson
Description Search
Enter any number of words or partial words.
Summary by Period
Summary by Code
Total
71201.94
Advanced
Search Now
Date
Type
Code
Description
Salesperson
Branch
Quantity
GL
01.01.1020
Service Income
0.00
30/4/2011
Inv
600014
Steve Sampson
02
0.00
30/4/2011
Inv
600015
Steve Sampson
02
0.00
GL
01.01.1030
Support Income
0.00
IN
00ADPEN17MONITOI
AOpen 17"" LCD Monitor
14.00

IMPLEMENTATION GUIDE

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

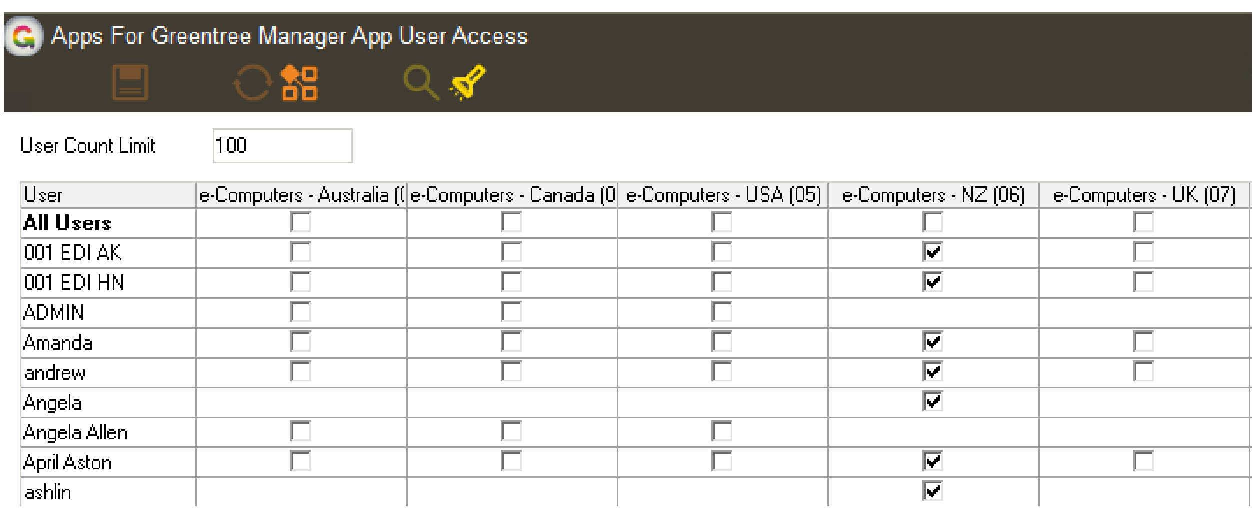
APP INSTALLATION

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



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

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



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.