Debtor Search

Video Training Manual 2016 - [Click Here]

Debtors / Customer Module> Configuration> Debtors / Customer Setup

The Debtors or Customer setup is essential and serves as a centralised repository for all relevant debtor or customer data.

In the Debtor setup search, you will see two search tabs

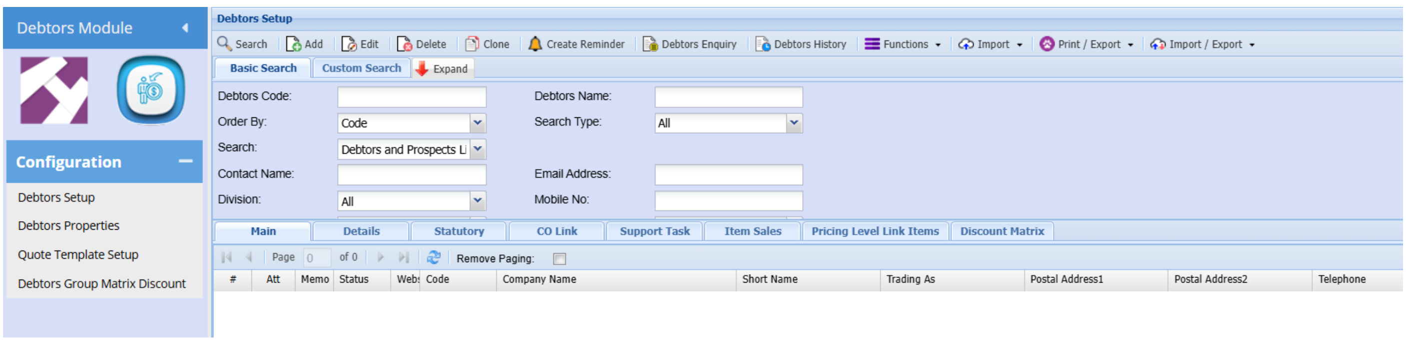
Basic Search tab	If you know the code of the Debtor or Customer or part of it you can search here
Custom Search tab	If you have setup custom fields in your debtor or customer setup, you can search for the items in this area.

> If you leave the basic search blank, it will bring up all debtors or customer codes which will be sorted in debtor or customer code order alphabetically.

System Buttons

Search button allows a user to search using the Basic Search Tab and Custom Search Tab

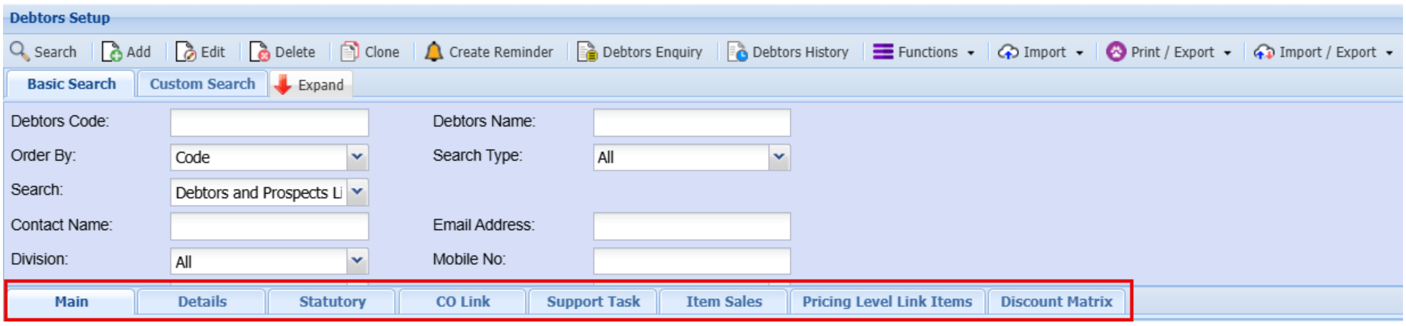
> Basic Search tab, if the debtor’s code in the basic search Tab or debtor’s name is left blank, this will bring back all the debtors listed in the system sorted alphabetically. If the cursor is placed on name at the column head, this will sort the names A-Z or Z-A as preferred.



The Navigation Ribbon is used to action the following functions:

Search Button	The search function will return Debtors or customer records based on the search criteria entered.
Add Button	Allows you to create a Debtor or Customer
Edit Button	Allows you to make changes to an existing debtor or customer
Delete Button	Allows you to delete an existing debtor or customer
Clone	Duplicate an existing debtor or customer
Create a Reminder	Allows you to create reminders
Debtor Enquiry	Allows you to detailed sales of a customer or debtor
Functions Drop Down	Has a list of functions that you can compete against a debtor or customer
Import Dropdown	Allows user to import debtor or customer details
Print Dropdown	Allows you to print your debtors in PDF or download an excel sheet of customers or debtors details
Export/ Export Drop Down	Allows you to import or export debtors or customer details

Search Tab Option

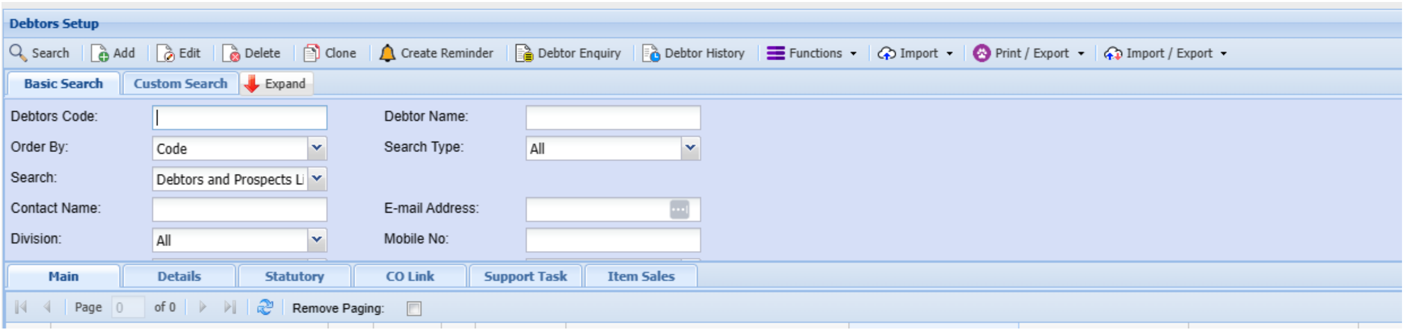


There are six search tabs options

Main Tab	Show a list of all debtors or customers
Details Tab	Shows the main details of a specific debtor or customer that you are searching for
Statutory Tab	Shows statutory information of a specific debtor or customer that you are searching for
CO Link	
Support Task	Shows all support tasks under the specific debtor or customer that you are searching for
Sales Item	Shows all invoices against a specific debtor or customer that you are searching for

Pricing Level Link Items	Shows new pricing level to a customer with linked items with special pricing
Discount Matrix	Shows discount given to this particular Debtor

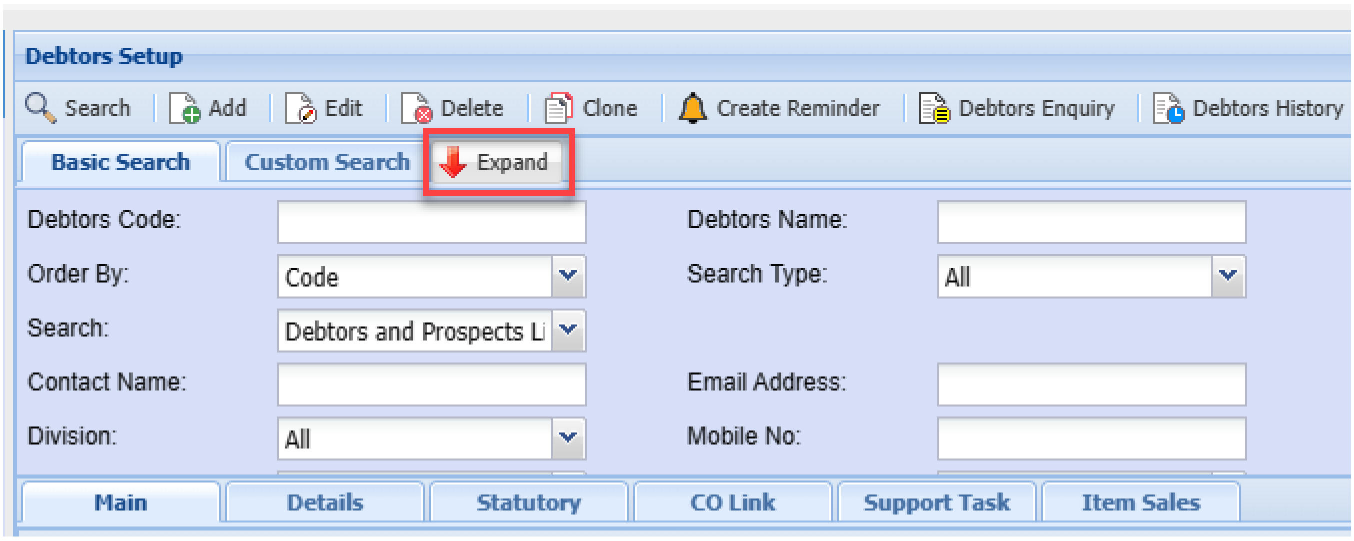
Custom Search tab, Custom search searches according to the category selection on the drop-down arrow and the system will bring back all that is selected on the category.



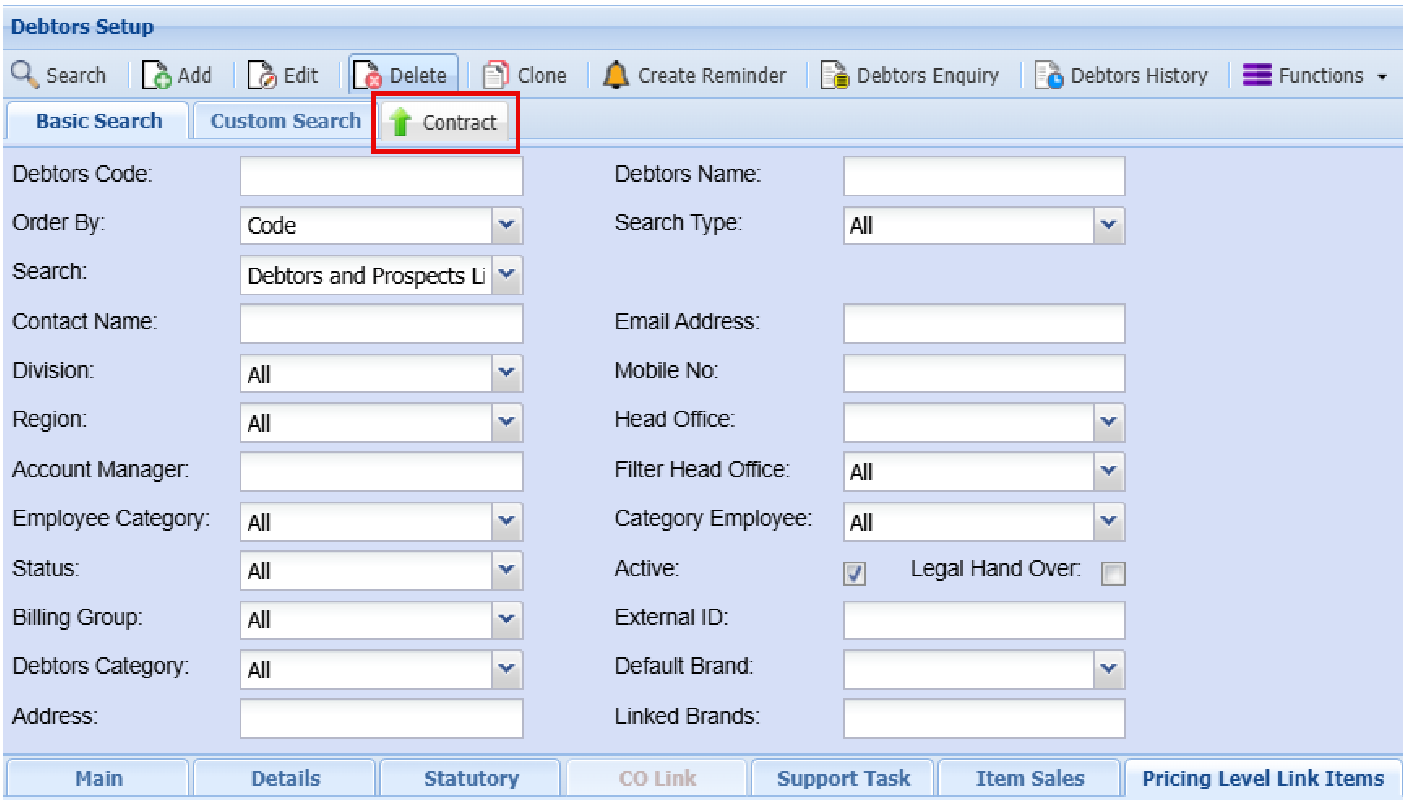
Expand button

To show more search filter criteria or Contract button to show less search filter criteria

Click on Expand button



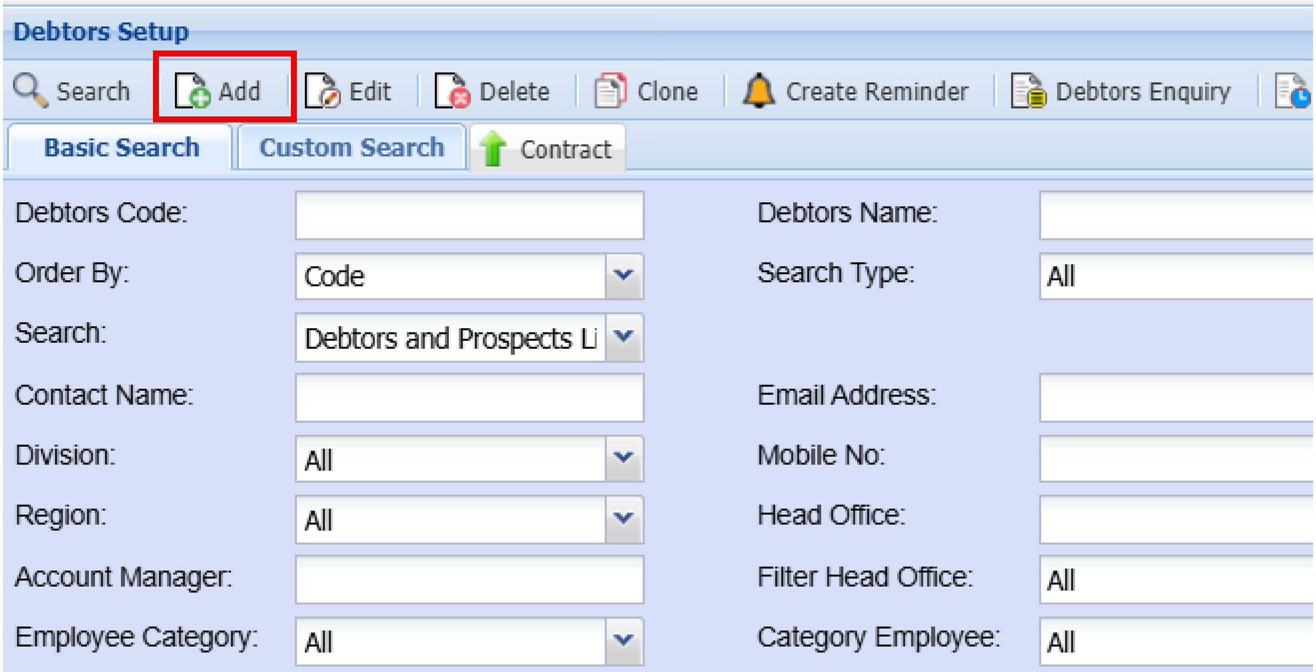
Contract button



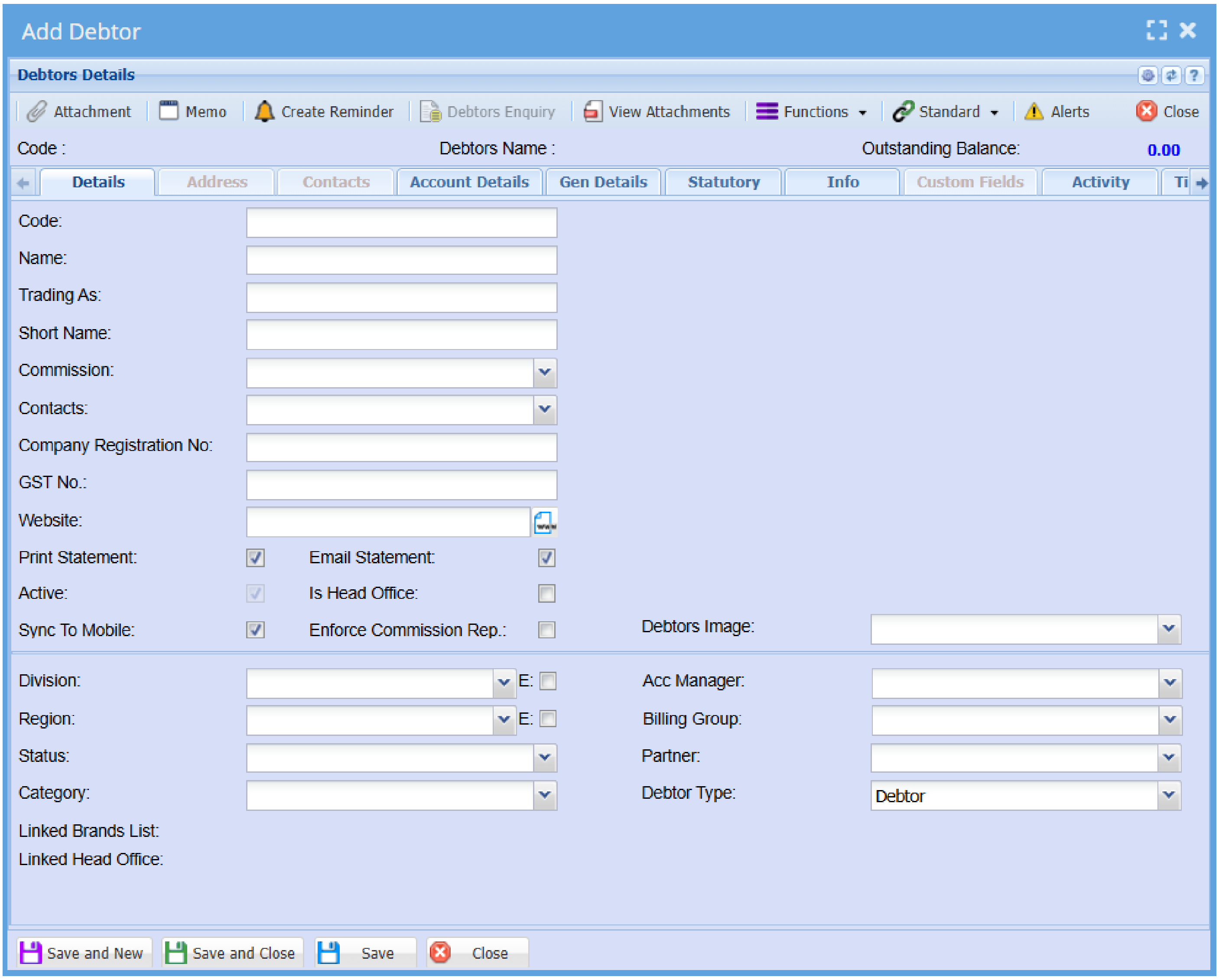
Debtors Code	Search on Debtors code or part of the code
Order By	Select the Order you would like your report by Code, Description
Search	Filter by Debtors, Prospects or and opportunities
Contact name	Debtors main Contact Person
Division	If you have set up divisions for your debtors, you can pull the report for all your debtors or you can select a specific Division from the drop-down menu.
Region	You can pull the report for all your debtors, or you can select a specific Region from the drop-down menu if you have set up Regions for your debtors.
Account manager	Shows the person who is responsible for this account

Add Button

To create a new Debtor/ Customer you need to click on the [Add Button]



Add Debtor buttons



Code	Create a unique code for this debtor
Name	Name of the Company
Trading As	Name the company is trading under
Short Name	Shortened version of the name
Commission	Shows who gets commission on sales for this Debtor
Contacts	Shows all Contacts associated with this Debtor
Print/Email Statement	Shows if the Debtor would like their statement Emailed or Posted
Active	Shows if this Debtor is active or inactive if not ticked
Sync to Mobile	Shows on the mobile app if this is part of your package
Debtors image	Shows the Company Logo which you will find if added to Attachments
Debtor Type	Shows if this Debtor is an Opportunity, Prospect, or can be promoted to an active Debtor

---

Revision #27
Created 19 July 2023 13:07:17 by Paige
Updated 17 December 2024 02:35:52 by Pamela