

Creditors Analysis

Creditors > Analysis > Creditors Analysis

This form shows a financial record of a selected creditor. One can search by selecting from the following

Standard Top Tab	
Creditor's Name	to search by selecting the creditor

Outstanding Balance	creditor's outstanding balance and comes up automatically as soon as the creditor is selected
Date From	allows a user to back date in order to find creditor financial records
Date To	to limit creditor's analysis search run
Order By	to search by selecting order by from the drop down arrow
Currency	currency used by the creditor
Notes Tab	allows a user to search the notes made against the debtor
Contact	search by selecting from the contact from the drop down arrow
Show Complete	search completed notes by selecting from the drop down arrow
Sort By	search customer's notes by selecting sort by from the drop down arrow
Notes Tab	
Search	from selecting the Contact from the drop down arrow
Insert button	to insert a note
Amend button	allows changes to be made on the notes
Delete button	to delete the note
View button	to view the notes
Email Reminder button	to email the reminder
Below Tabs	will show the list of selected creditor's record according to the date selected
Transaction Tab	shows a list of creditor's entries according to the date
Purchase Order Tab	shows creditor's purchase orders records
Del Note Tab	shows a list of delivery notes transactions
Goods Received Note Tab	shows a list of GRV transactions
Stock Return Tab	shows a list of stock returns transactions
Debit Allocation Tab	shows a list of debit allocation transactions and allows a user to search by selecting the Status from the drop down arrow
Credit Allocation Tab	shows a list of credit allocations transactions

Cashbook	shows a list of cashbooks
Journals Tab	shows a list of journals transactions
Standard Bottom Tabs	
Export	Exports the selected creditors Analysis into an excel spread sheet.
Print	Prints the selected creditor's analysis
View	allows the user to view selected creditors analysis items or edit the information.
Related Transactions	Shows the related transactions for the selected creditors analysis
Print Statements	to print selected creditor's statement
Print Allocation Report	to print selected creditor's allocations report
Print Decimals	to print selected creditors decimal reports

Revision #5

Created 21 July 2023 19:20:36 by Paige

Updated 8 June 2026 22:11:24 by Paige