

Document History Menu

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Debtors Document History

Search on all posted debtors documents

Posted documents reside here from the Activity Menu

Debtors > Analysis> Document History

Debtor Document History

Search

View

Clone

Delete

Create Template

Related Transactions

Create Reminder

Email Self

Print / Export

Basic Search

Custom Search

Expand

Doc Type:

All

Document Number:

To:

Debtor Code:

Date From:

2023-12-21

Short Description:

Order By:

Date

Sales Rep.:

All

Debtor Name:

Date To:

2024-01-21

Reference:

Page 1 of 1

Remove Paging:

Revert Quote

Total Ex VAT:

#	Att	Memo	Doc. Date	Doc. Type	Doc. No	Assembly	Debtor Code	Job No.	Debtor Name
1			2024-01-20	Invoice			IS002		Imraan _ New Lead
2			2024-01-20	Invoice			1002		TRACEY LEE MOODLEY
3			2024-01-20	Invoice			ABC007		ABD Company
4			2024-01-19	Quote	QT501224		1002		TRACEY LEE MOODLEY
5			2024-01-18	Invoice	INV808712		IS009		IS LEAD
6			2024-01-18	Invoice	INV808713		ABC007		ABD Company
7			2024-01-18	Invoice	INV808714		ABC007		ABD Company
8			2024-01-17	Invoice	INV808710		STO001		Stonewood Homes
9			2024-01-17	Invoice Usage			IS009	JOB5019	IS LEAD

This allows you to search for any documents created.

Document Type	Select the type of document you wish to find.
Document Number	Enter a specific document number if applicable.
Debtor Code	Enter a specific debtor’s code to narrow down search results.
Date From and to	Enter the time frame in which the search should run.
Short Description	Enter the short description that would appear on the document.
Order By	Select the order in which the results should be displayed.
Sales Rep	Select the sales representative to narrow down search results.
Debtors Name	Enter the Debtors name to narrow down search results.

Reference	Enter a reference that would have appeared on the document.
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Functions

Debtor Document History

Search

View

Clone

Delete

Create Template

Related Transactions

Create Reminder

Email Self

Functions

Print / Export

Basic Search

Custom Search

Expand

Doc Type:

All Invoices

Document Number:

To:

Debtor Code:

Date From:

2024-08-31

Short Description:

Order By:

Date

Sales Rep.:

All

Debtor Name:

Date To:

2024-11-29

Reference:

Update Bulk Email Flags

Email Processed Invoices

Update Bulk Email Flags

Update Bulk Email Flag Status

Status:

☒ Include In Bulk Email

☐ Exclude From Bulk Email

Continue

Close