

Debtors Search Analysis

Debtors search is a duplicate of the Debtors setup menu however you cannot add new debtors here.

This menu is for staff members who want to see the debtor's/customer's details but may not be allowed to any details.

Enable Edit Debtor in the security button

Debtor Search

Search

Create Reminder

Edit Debtor

Print / Export

Basic Search

Custom Search

Expand

Debtors Code:

Debtor Name:

Order By:

Code

Search Type:

All

Search:

Debtors and Prospects Li

Contact Name:

Email Address:

Division:

All

Mobile No:

Main

Details

Information

Statutory

CO Link

Support Task

Custom Fields

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Remove Paging:

#	Att	Memo	Status	Name	Code	Tax Number	Account Manager	Billing Group	Postal Address 1
1						?	Arlecia van Roo...	30 Day Account	
2				Cape Coaters (Pty) Ltd	001	4310346684	Arlecia van Roo...	30 Day Account	
3				TRACEY LEE MOODLEY	1002		Arlecia van Roo...	30 Day Account	
4				TRACEY LEE MOODLEY	1003		Arlecia van Roo...	30 Day Account	
5				ACE Traders	1008	123	Arlecia van Roo...	30 Day Account	123
6				test 2	10145		Gerrit van Rooy...		34 ABC road
7				MG New sales lead 1	1018				
8				MG New sales lead 2	1019				
9				test	1020				
10					1022				
11				dsfs	1023				

System Buttons:

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

Search	Search Debtors
Create Reminder	Create a reminder for a Debtor
Edit button	Click the edit button to make changes to an existing Debtor.
Expand button	To show more search filter criteria or a Contract button to show less search filter criteria

Print Export Drop Down allows one to select from the following options:

Print button	Print all the debtors listed in the system sorted alphabetically
Export Debtors button	Export debtors list to Excel spreadsheet.
Export Contacts button	Exports Contacts to an Excel spreadsheet

In the Basic Search tab, if the debtor’s code or 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. Remember to put a tick by remove paging so it sorts by all customers/ debtors or this will only look at a current page

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