

Debtor Analysis

[Job Costing > Analysis > Debtor Analysis](#)

Search – search button will search for the items selected for search

Export – the export button allows the exporting of data to an excel spreadsheet

Print – will open a quote print selection window and that will allow you select what you want to have on your print out

View - The View button allows the user to see the details of a quote or invoice etc.

View Linked S/N- this allows the user to view serial numbers that are linked to items

Related Transactions – this will show the related transaction of an invoice Quote etc.

Print Allocation Report – from here an allocation report for this debtor can be generated.

Print Statement PDF – a PDF statement for this debtor can be printed

Create Reminder – a reminder can be created in this field for this debtor or self-depending what the Purpose of the reminder is for.

Customer – This is where you enter the details of your customer.

Outstanding Balances – this is the monies owed to you by this client.

Date From and date to – this is the date range that governs the display of transactions against this client.

Order By – this is the directive in which you want the information to be displayed.

Currency – this is the currency used for this debtor as setup in the debtor's setup.

Total, current, 30 days etc. – this displays the total monies due and at a certain periods

The following tabs work like dashboard tabs where the user gets to have an overall view of the transactions against the selected Client.

Transactions Tab - will list all the transactions for this debtor (date range inconsideration)

Debtor Detail – will display the company information for the selected client

Quotes – will show all the quotes

Jobs – shows all the Jobs

Invoices – Shows All the Invoices

Credit Notes – Any Available Credit Notes

Debit Allocations – Shows Debit allocations

Credit Allocations- Shows Credit allocations

Cashbooks – shows you the available processed cashbooks

Journals – will display all the processed Journals for this Debtor

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