

TaiRox Productivity Tools User Guide

Sales History Inquiry

Some businesses do not have fixed price lists. Rather, the price they charge a customer for an item is related to their most recent cost of the item or the most recent price they have charged this customer or have charged other customers. Sales History Inquiry provides a time-saving way to establish a price by assembling information into a single window.

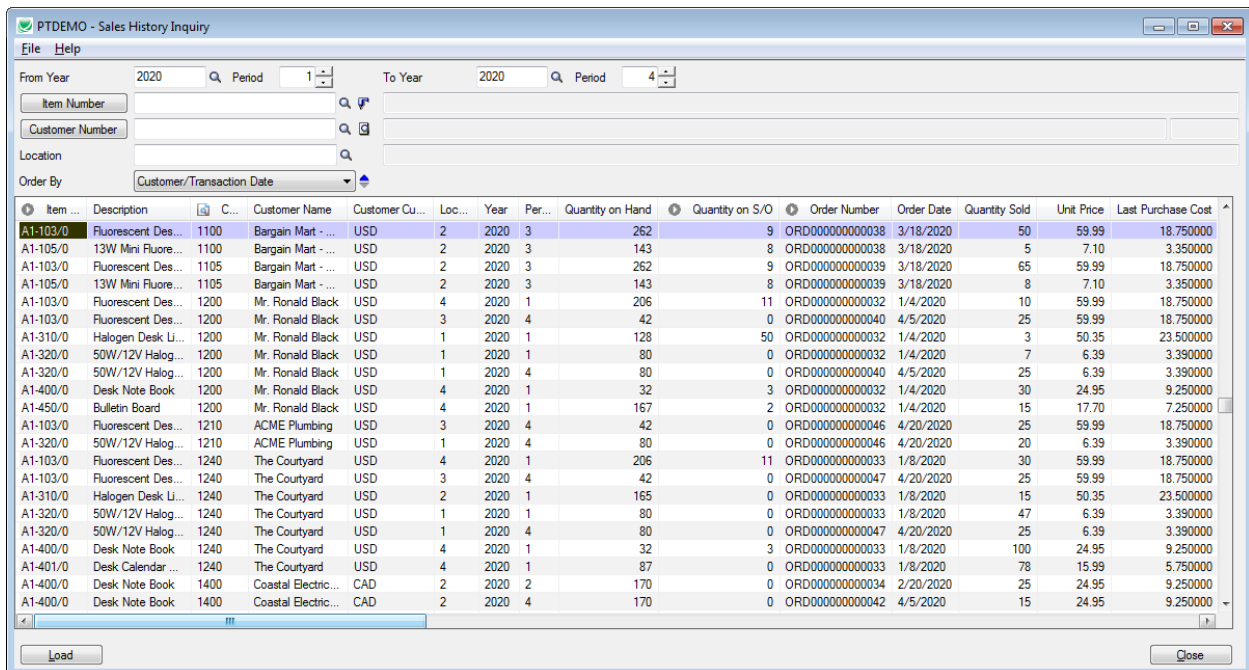
The sales history lines can be filtered by Item Number, by Customer Number or by Location, separately or in combination. If a field is blank, no filtering will be done by that field. Any of the 6 sort orders supported by the Sales History objects can be selected.

The pictures in this user guide show all columns that will be displayed for users with full rights. Columns will be hidden from users based on their permissions. Users must be able to use the Sales History program in Order Entry to use Sales History Inquiry. Users must be able to use the Purchase History program in Purchase Orders in order to see the purchase order related columns. In addition, users must have the Item Cost Inquiry right in order to see the columns showing costs.

A large number of drill-down operations are available from Sales History Inquiry, including the ability to drill to TaiRox's Vendor Inquiry program. Drill-down operations will be limited by users' rights. There are a large number of columns in Sales History Inquiry.

The 3 pictures following document all columns available. Columns can be dragged to different locations. **New:** rows highlighted in yellow are invoices to which credits have been applied.

Leftmost columns:



The screenshot shows the PTDEMO - Sales History Inquiry window. The interface includes search filters for From Year (2020), To Year (2020), Item Number, Customer Number, and Location. The 'Order By' dropdown is set to 'Customer/Transaction Date'. The main table displays sales history with columns: Item, Description, C., Customer Name, Customer Cu..., Loc..., Year, Per..., Quantity on Hand, Quantity on S/O, Order Number, Order Date, Quantity Sold, Unit Price, and Last Purchase Cost. The first row is highlighted in yellow.

Item	Description	C.	Customer Name	Customer Cu...	Loc...	Year	Per...	Quantity on Hand	Quantity on S/O	Order Number	Order Date	Quantity Sold	Unit Price	Last Purchase Cost
A1-103/0	Fluorescent Des...	1100	Bargain Mart - ...	USD	2	2020	3	262	9	ORD000000000038	3/18/2020	50	59.99	18.750000
A1-105/0	13W Mini Fluore...	1100	Bargain Mart - ...	USD	2	2020	3	143	8	ORD000000000038	3/18/2020	5	7.10	3.350000
A1-103/0	Fluorescent Des...	1105	Bargain Mart - ...	USD	2	2020	3	262	9	ORD000000000039	3/18/2020	65	59.99	18.750000
A1-105/0	13W Mini Fluore...	1105	Bargain Mart - ...	USD	2	2020	3	143	8	ORD000000000039	3/18/2020	8	7.10	3.350000
A1-103/0	Fluorescent Des...	1200	Mr. Ronald Black	USD	4	2020	1	206	11	ORD000000000032	1/4/2020	10	59.99	18.750000
A1-103/0	Fluorescent Des...	1200	Mr. Ronald Black	USD	3	2020	4	42	0	ORD000000000040	4/5/2020	25	59.99	18.750000
A1-310/0	Halogen Desk Li...	1200	Mr. Ronald Black	USD	1	2020	1	128	50	ORD000000000032	1/4/2020	3	50.35	23.500000
A1-320/0	50W/12V Halog...	1200	Mr. Ronald Black	USD	1	2020	1	80	0	ORD000000000032	1/4/2020	7	6.39	3.390000
A1-320/0	50W/12V Halog...	1200	Mr. Ronald Black	USD	1	2020	4	80	0	ORD000000000040	4/5/2020	25	6.39	3.390000
A1-400/0	Desk Note Book	1200	Mr. Ronald Black	USD	4	2020	1	32	3	ORD000000000032	1/4/2020	30	24.95	9.250000
A1-450/0	Bulletin Board	1200	Mr. Ronald Black	USD	4	2020	1	167	2	ORD000000000032	1/4/2020	15	17.70	7.250000
A1-103/0	Fluorescent Des...	1210	ACME Plumbing	USD	3	2020	4	42	0	ORD000000000046	4/20/2020	25	59.99	18.750000
A1-320/0	50W/12V Halog...	1210	ACME Plumbing	USD	1	2020	4	80	0	ORD000000000046	4/20/2020	20	6.39	3.390000
A1-103/0	Fluorescent Des...	1240	The Courtyard	USD	4	2020	1	206	11	ORD000000000033	1/8/2020	30	59.99	18.750000
A1-103/0	Fluorescent Des...	1240	The Courtyard	USD	3	2020	4	42	0	ORD000000000047	4/20/2020	25	59.99	18.750000
A1-310/0	Halogen Desk Li...	1240	The Courtyard	USD	2	2020	1	165	0	ORD000000000033	1/8/2020	15	50.35	23.500000
A1-320/0	50W/12V Halog...	1240	The Courtyard	USD	1	2020	1	80	0	ORD000000000033	1/8/2020	47	6.39	3.390000
A1-320/0	50W/12V Halog...	1240	The Courtyard	USD	1	2020	4	80	0	ORD000000000047	4/20/2020	25	6.39	3.390000
A1-400/0	Desk Note Book	1240	The Courtyard	USD	4	2020	1	32	3	ORD000000000033	1/8/2020	100	24.95	9.250000
A1-401/0	Desk Calendar ...	1240	The Courtyard	USD	4	2020	1	87	0	ORD000000000033	1/8/2020	78	15.99	5.750000
A1-400/0	Desk Note Book	1400	Coastal Electric...	CAD	2	2020	2	170	0	ORD000000000034	2/20/2020	25	24.95	9.250000
A1-400/0	Desk Note Book	1400	Coastal Electric...	CAD	2	2020	4	170	0	ORD000000000042	4/5/2020	15	24.95	9.250000

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Middle Columns:

Purchase Cost	Last Purchase Qty.	Last Purchase UOM	Vendor	Vendor Currency	Receipt Number	Receipt Date	Vendor Name	Shipment Number	Ship Date	Invoice Number	Invoice Date
18.750000	15	Ea.	1200	USD	RCP0000079	6/30/2020	Chloride Sys...	SH0000000000000000...	3/18/2020	IN000000000000036	3/18/2020
3.350000	75	Ea.	1450	USD	RCP0000058	6/23/2020	Intercontine...	SH0000000000000000...	3/18/2020	IN000000000000036	3/18/2020
18.750000	15	Ea.	1200	USD	RCP0000079	6/30/2020	Chloride Sys...	SH0000000000000000...	3/18/2020	IN000000000000037	3/18/2020
3.350000	75	Ea.	1450	USD	RCP0000058	6/23/2020	Intercontine...	SH0000000000000000...	3/18/2020	IN000000000000037	3/18/2020
18.750000	15	Ea.	1200	USD	RCP0000079	6/30/2020	Chloride Sys...	SH0000000000000000...	1/4/2020	IN000000000000030	1/4/2020
18.750000	15	Ea.	1200	USD	RCP0000079	6/30/2020	Chloride Sys...	SH0000000000000000...	4/5/2020	IN000000000000038	4/5/2020
23.500000	5	Ea.	1200	USD	RCP0000080	6/30/2020	Chloride Sys...	SH0000000000000000...	1/4/2020	IN000000000000030	1/4/2020
3.390000	8	Ea.	1500	USD	RCP0000062	6/23/2020	Gould Manu...	SH0000000000000000...	1/4/2020	IN000000000000030	1/4/2020
3.390000	8	Ea.	1500	USD	RCP0000062	6/23/2020	Gould Manu...	SH0000000000000000...	4/5/2020	IN000000000000038	4/5/2020
9.250000	15	Ea.	1540	USD	RCP0000063	6/23/2020	Hart Batteries	SH0000000000000000...	1/4/2020	IN000000000000030	1/4/2020
7.250000	12	Ea.	1750	USD	RCP0000065	6/23/2020	Esser Engin...	SH0000000000000000...	1/4/2020	IN000000000000030	1/4/2020
18.750000	15	Ea.	1200	USD	RCP0000079	6/30/2020	Chloride Sys...	SH0000000000000000...	4/20/2020	IN000000000000044	4/20/2020
3.390000	8	Ea.	1500	USD	RCP0000062	6/23/2020	Gould Manu...	SH0000000000000000...	4/20/2020	IN000000000000044	4/20/2020
18.750000	15	Ea.	1200	USD	RCP0000079	6/30/2020	Chloride Sys...	SH0000000000000000...	1/8/2020	IN000000000000031	1/8/2020
18.750000	15	Ea.	1200	USD	RCP0000079	6/30/2020	Chloride Sys...	SH0000000000000000...	4/20/2020	IN000000000000045	4/20/2020
23.500000	5	Ea.	1200	USD	RCP0000080	6/30/2020	Chloride Sys...	SH0000000000000000...	1/8/2020	IN000000000000031	1/8/2020
3.390000	8	Ea.	1500	USD	RCP0000062	6/23/2020	Gould Manu...	SH0000000000000000...	1/8/2020	IN000000000000031	1/8/2020
3.390000	8	Ea.	1500	USD	RCP0000062	6/23/2020	Gould Manu...	SH0000000000000000...	4/20/2020	IN000000000000045	4/20/2020
9.250000	15	Ea.	1540	USD	RCP0000063	6/23/2020	Hart Batteries	SH0000000000000000...	1/8/2020	IN000000000000031	1/8/2020
5.750000	12	Ea.	1580	USD	RCP0000064	6/23/2020	Grant Office...	SH0000000000000000...	1/8/2020	IN000000000000031	1/8/2020
9.250000	15	Ea.	1540	USD	RCP0000063	6/23/2020	Hart Batteries	SH0000000000000000...	2/20/2020	IN000000000000032	2/20/2020
9.250000	15	Ea.	1540	USD	RCP0000063	6/23/2020	Hart Batteries	SH0000000000000000...	4/5/2020	IN000000000000040	4/5/2020

Rightmost Columns

Quantity on P/O	Quantity Available	Total Quantity on P/O	Total Quantity on Hand	Total Quantity on S/O	Total Quantity Available	Quantity Committed	Total Quantity Committed	Sales...	Salesperson ...
50	262	426	657	23	657	0	0	BB	Bill Bhaission
30	143	510	378	23	378	0	0	BB	Bill Bhaission
50	262	426	657	23	657	0	0	BB	Bill Bhaission
30	143	510	378	23	378	0	0	BB	Bill Bhaission
0	206	426	657	23	657	0	0	BB	Bill Bhaission
126	42	426	657	23	657	0	0	BB	Bill Bhaission
150	128	800	443	50	443	0	0	BB	Bill Bhaission
250	80	510	135	0	135	0	0	BB	Bill Bhaission
250	80	510	135	0	135	0	0	BB	Bill Bhaission
200	32	850	542	3	542	0	0	BB	Bill Bhaission
200	167	825	731	2	731	0	0	BB	Bill Bhaission
126	42	426	657	23	657	0	0	DA	Don A. Tio
250	80	510	135	0	135	0	0	DA	Don A. Tio
0	206	426	657	23	657	0	0	DN	Dan Nishiga
126	42	426	657	23	657	0	0	DN	Dan Nishiga
25	165	800	443	50	443	0	0	DN	Dan Nishiga
250	80	510	135	0	135	0	0	DN	Dan Nishiga
250	80	510	135	0	135	0	0	DN	Dan Nishiga
200	32	850	542	3	542	0	0	DN	Dan Nishiga
200	87	833	579	0	579	0	0	DN	Dan Nishiga
250	170	850	542	3	542	0	0	RB	Rhonda Barnes
250	170	850	542	3	542	0	0	RB	Rhonda Barnes