Sales History Inquiry

Some businesses do not have fixed price lists. Instead, 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 past cost and price information in a single window.

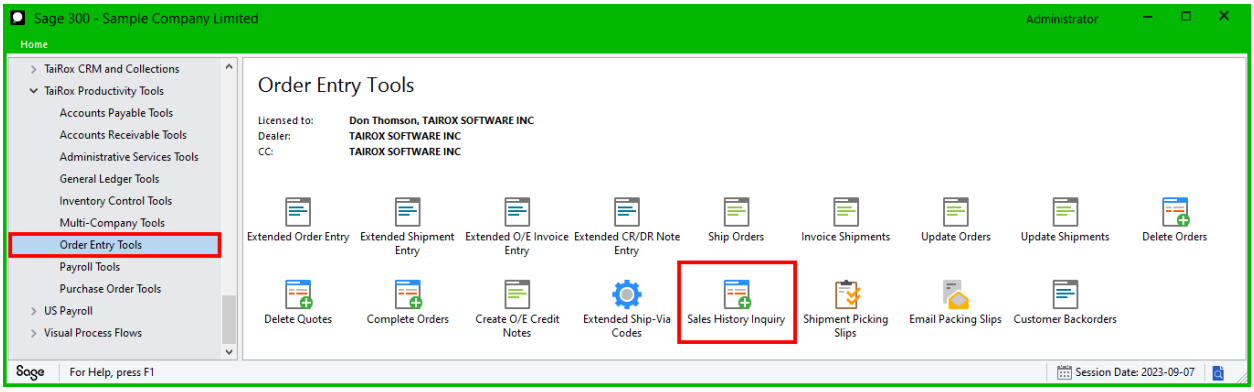
Sales History Inquiry features:

- Display data for a range of dates.
- Filter sales history by Item Number, by Customer Number or by Location, separately or in combination.
- Sort data by Customer, Item, Salesperson, Customer/Transaction Date, Item Transaction Date, or Salesperson/Transaction date.

Sales History Inquiry displays information based on user permissions. Columns will be hidden if users do not have permission to view the data.

- Users require access to the Sales History program in Order Entry to use Sales History Inquiry.
- Users require access to 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.

The Sales History Inquiry icon appears under **TaiRox Productivity Tools > Order Entry Tools** on the Sage 300 desktop and can be copied to other menu locations.



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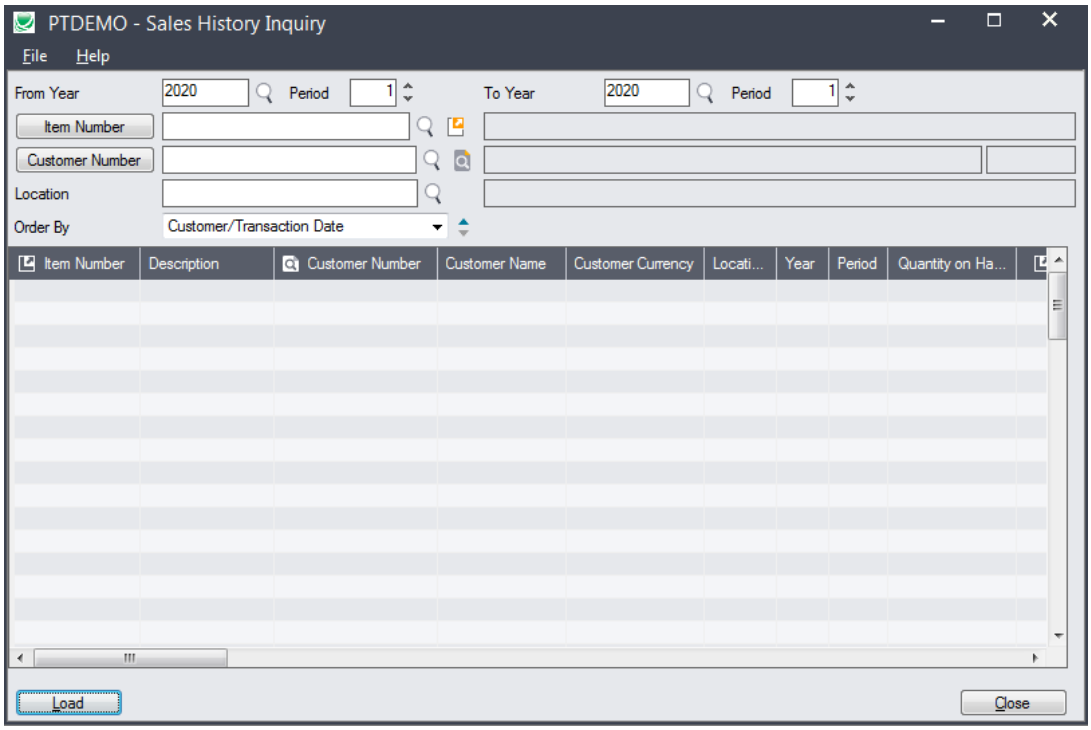
Using Sales History Inquiry

Click the Sales History Inquiry icon to display the Sales History Inquiry screen – shown below.

A large number of drill-down operations are available from Sales History Inquiry, including the ability to drill to TaiRox's Customer Inquiry program. Drill-down operations are limited by users' rights.



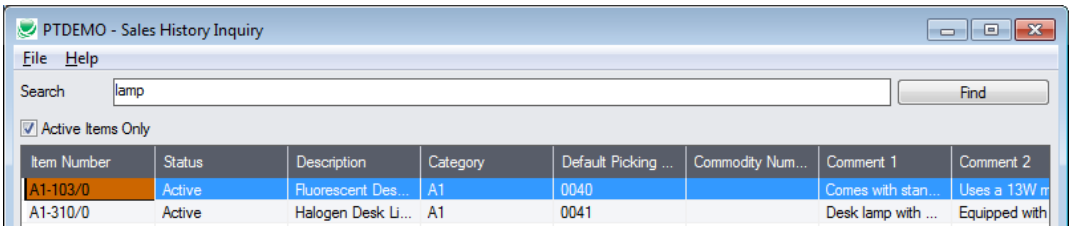
Select a date range for sales history lookup

- Select a start and end year and period sales history. The program default is for the current period, but it remembers the last setting that you used.

Select the item for which you want sales information

If you do not specify an item number, the program will load all items for the date range, customer and location you specify.

- Click the Item Number button.



- Enter one or more words or word fragments in the next field to search multiple tables and fields.
- You can filter for Active items only.

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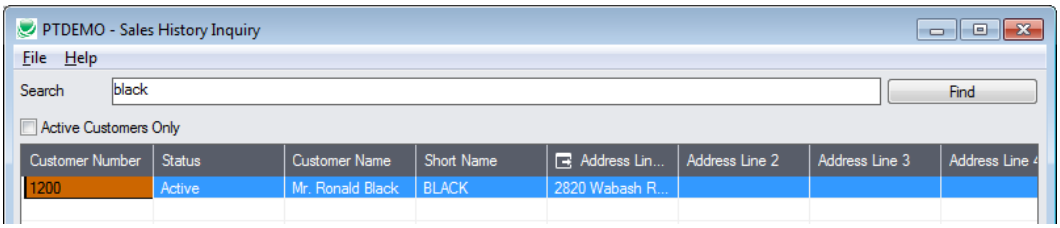
- Search returns items that contain the search string in any of the searched fields – for example, one record may have “Desk” in the Description field, where another may have it in the Comment 1 field. Both items will be displayed.

See Using the Item Number SmartFinder button for more information.

Select the customer for which you want sales information

If you do not specify a customer the program will load information for the specified item for all customers with sales in the date range and location you specify.

- Click the Customer Number button.



- Enter one or more words or word fragments in the entry field to search multiple tables and fields.
- You can filter to retrieve active customers only and active ship-to locations only.
- Search returns customers and ship-to location records which contain the search string in any of the searched fields.
  - The top grid displays the customers matching the search criteria. Double-click to select an order.
  - The bottom grid displays the ship-to locations that match the search criteria.

  Note that the ship-to locations ***may not*** be related to the customer records displayed in the top part of the screen. Ship-to locations appear *only* if they contain the search string.

  - **Using multiple words in the search?** Enter "300 Main" and the search will find entries "300 Main Street" as well as "123 Main Street, Suite 300".
  - **Searching for a phone number?** Enter the phone number segments separated by blanks. Enter "451 8991" and the search will find "(451) 555-8991" as well as "(408) 451-8991".

See Using the Customer Number SmartFinder button for more information.

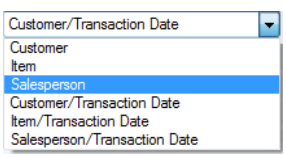
Select the location for which you want sales information

If you do not specify a location the program will load information for the specified item and customer with sales in the date range you specify.

- Click the Finder button beside the location code and select the location you want.

Select the order in which you want data displayed

Sales History Inquiry lets you sort the item cost and pricing data by Customer, Item, Salesperson, Customer/Transaction Date, Item Transaction Date, or Salesperson/Transaction date.



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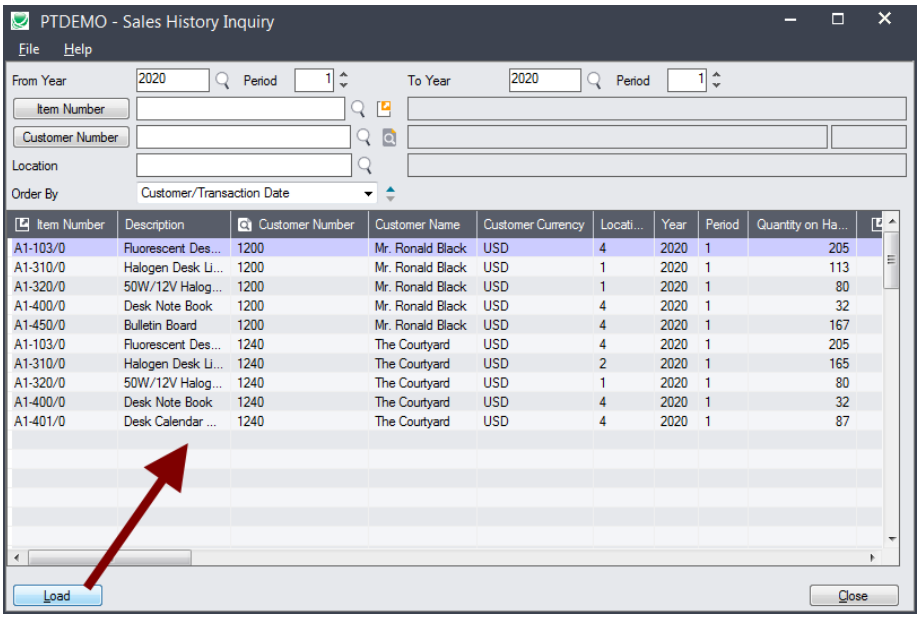
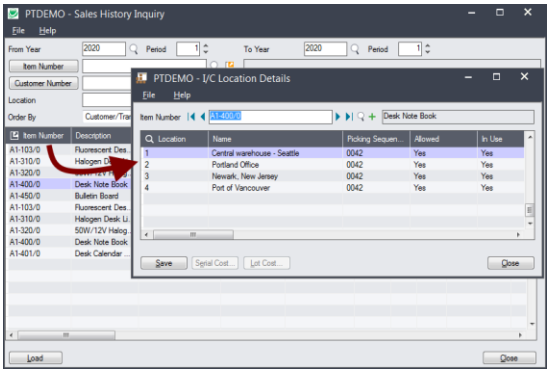
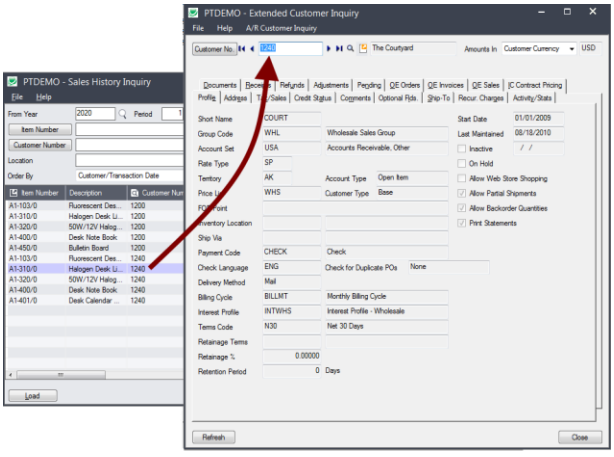
Click the Load button to display item information in the grid



- Double-click an Item Number or click the Item Number column heading to display location information.



- Double-click a Customer Number or click the Customer Number column heading to display information using TaiRox Extended Customer Inquiry.



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- You can also drill down on orders, shipments, invoices, receipts, vendors, and quantities available, on PO, on S/O, committed, etc. by double-clicking items or clicking on column headings.

Rows highlighted in yellow are invoices to which credits have been applied.

Columns displayed on the Sales History Inquiry screen

Note the following points:

- Columns will be hidden if users do not have permission to view the data.
- Users require access to the Sales History program in Order Entry to use Sales History Inquiry.
- Users require access to 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.

Column Name	Drill Down	Drill Down Screen
Customer Number	Yes	Extended Customer Inquiry
Customer Name		
Customer Currency		
Location		
Year		
Period		
Quantity on Hand		
Quantity on S/O	Yes	Pop-Up Quantity on S/O
Order Number	Yes	Extended Order Entry
Order Date		
Quantity Sold		
Unit Price		
Last Purchase Cost		
Last Purchase Qty.		
Last Purchase UOM		
Vendor	Yes	Extended Vendor Inquiry
Vendor Currency		
Receipt Number	Yes	Extended PO Receipt Entry
Receipt Date		
Vendor Name		
Shipment Number	Yes	Extended Shipment Entry
Ship Date		
Invoice Number	Yes	O/E Invoice Entry

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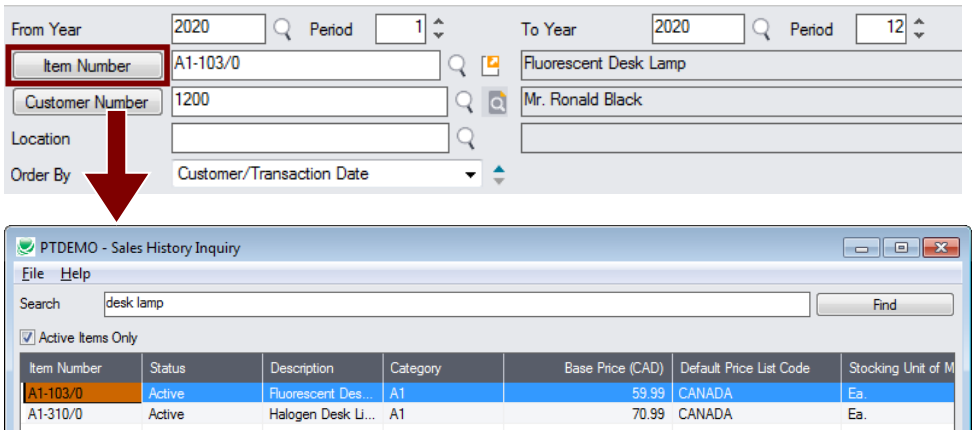
Column Name	Drill Down	Drill Down Screen
Invoice Date		
Quantity On P/O	Yes	Pop-Up Quantity on P/O
Quantity Available		
Total Quantity on P/O	Yes	Pop-Up Quantity on P/O
Total Quantity On Hand		
Total Quantity on S/O	Yes	Pop-Up Quantity on S/O
Total Quantity Available		
Quantity Committed	Yes	Pop-up Quantity Committed
Total Quantity Committed	Yes	Pop-up Quantity Committed
Salesperson		
Salesperson Name		
Unit Price Including Tax		
Tracking Number		

Using the Item Number SmartFinder button

Click the Item Number button to open the SmartFinder for items.



The Item SmartFinder provides a Search field for entering search words and a selection grid with the search results.

- Enter one or more words or word fragments in the Search field to search multiple tables and fields.
- Click the checkbox to search for Active items only.
- Search returns items that contain the search string in any of the searched fields.

  In the example above, “desk lamp” appears in the description for one item and in the comment field for the other item. Both items are displayed.

  Note:

  - *All of the word fragments must be present in one of the fields being searched*.

    For example, if you searched for “desk lamp”, you will not see an item where only “desk” is in the Description field and only “lamp” is in the Comment 1 field.

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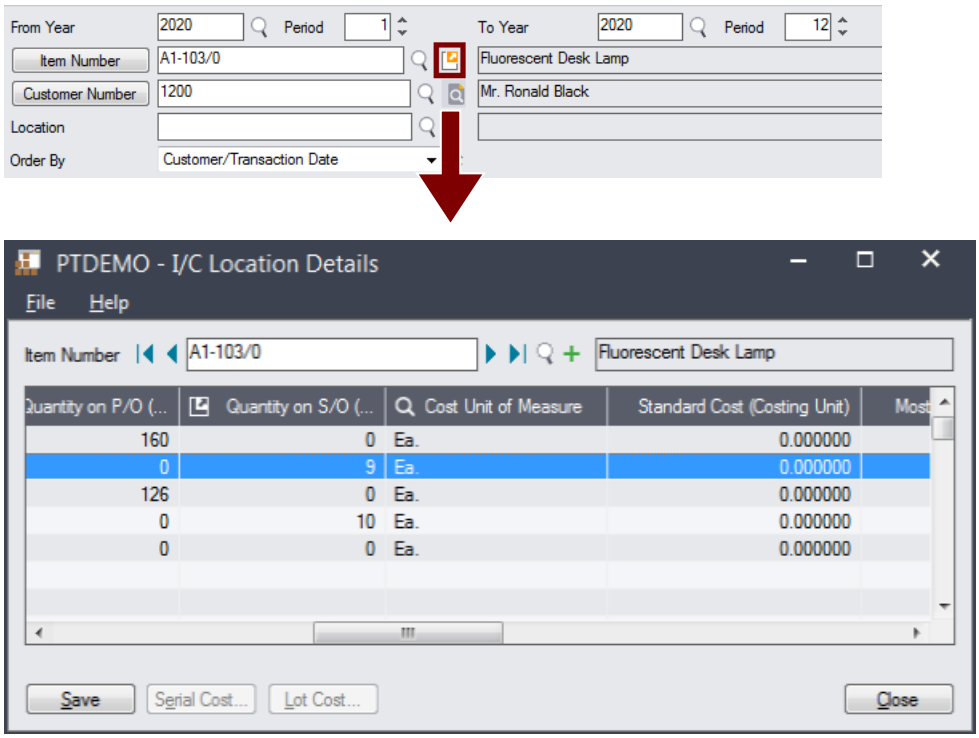
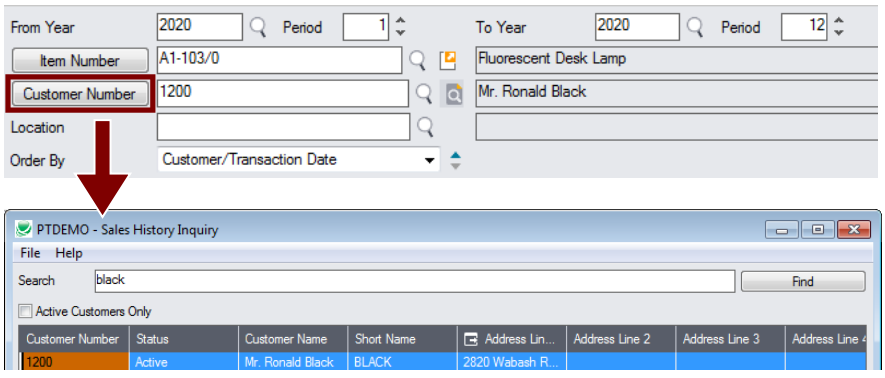
- **Using multiple words in the search?** Enter "300 Main" and the search will find entries "300 Main Street" as well as "123 Main Street, Suite 300".
- **Searching for a phone number?** Enter the phone number segments separated by blanks. Enter "451 8991" and the search will find "(451) 555-8991" as well as "(408) 451-8991".

Looking up location details with the Item Drill Down button



Using the Customer Number SmartFinder button

Click the Customer Number button to open the SmartFinder for searching customers.



- Enter part of a name or address (or contact phone or email address) and click the Find button.
- Double-click the customer to select it and return you to the Inquiry form.

Search:

- Enter one or more words or word fragments in the entry field to search multiple tables and fields.

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- You can filter to retrieve active customers only and active ship-to locations only.
- Search returns customers and ship-to location records which contain the search string in any of the searched fields – for example, one record may have “Royal” in the name, where another may have it in the address field. Both records will be displayed.
  - **Using multiple words in the search?** Enter "300 Main" and the search will find entries "300 Main Street" as well as "123 Main Street, Suite 300".
  - **Searching for a phone number?** Enter the phone number segments separated by blanks. Enter "451 8991" and the search will find "(451) 555-8991" as well as "(408) 451-8991".

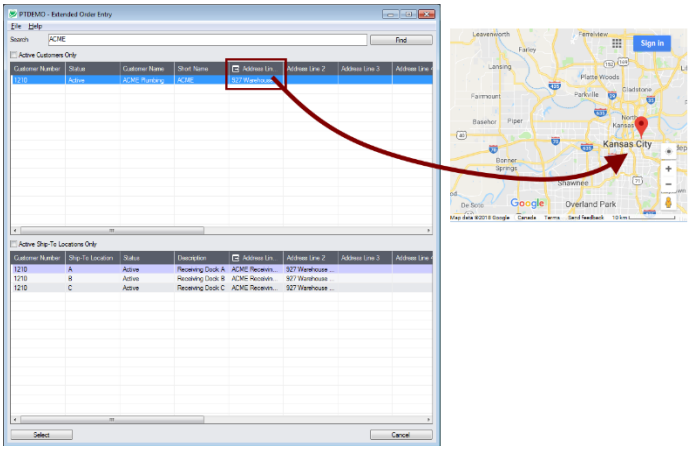
Note:

- *All of the word fragments must be present in one of the fields being searched*. (For example, if you searched for “Ross Blvd”, you will not see a customer where “Ross” is in the Customer Name field and “Blvd” is in the Address 1 field.)
- Addresses (e.g. the Bill-To addresses) are treated as a single field.

Display:

- The top grid displays the customers matching the search criteria. Double-click to select a customer.
- The bottom grid displays the ship-to locations that match the search criteria.

  Note that the ship-to locations ***may not*** be related to the customer records displayed in the top part of the screen. Ship-to locations appear *only* if they contain the search string.
- Click the Address column heading or double-click the address to launch **Google Maps** with the bill-to address. You can also check the locations of ship-to addresses.



- Double-click email addresses (such as the Bill-To Contact E-mail) to create new emails.

Looking up customer details with Extended Customer Inquiry

The Customer Inquiry button displays the TaiRox Productivity Tools Extended Customer Inquiry screen – a convenient way to view all data related to the customer. Each tab focuses on an aspect of the customer’s data.

You can also look up details for other customers while you are on this screen.

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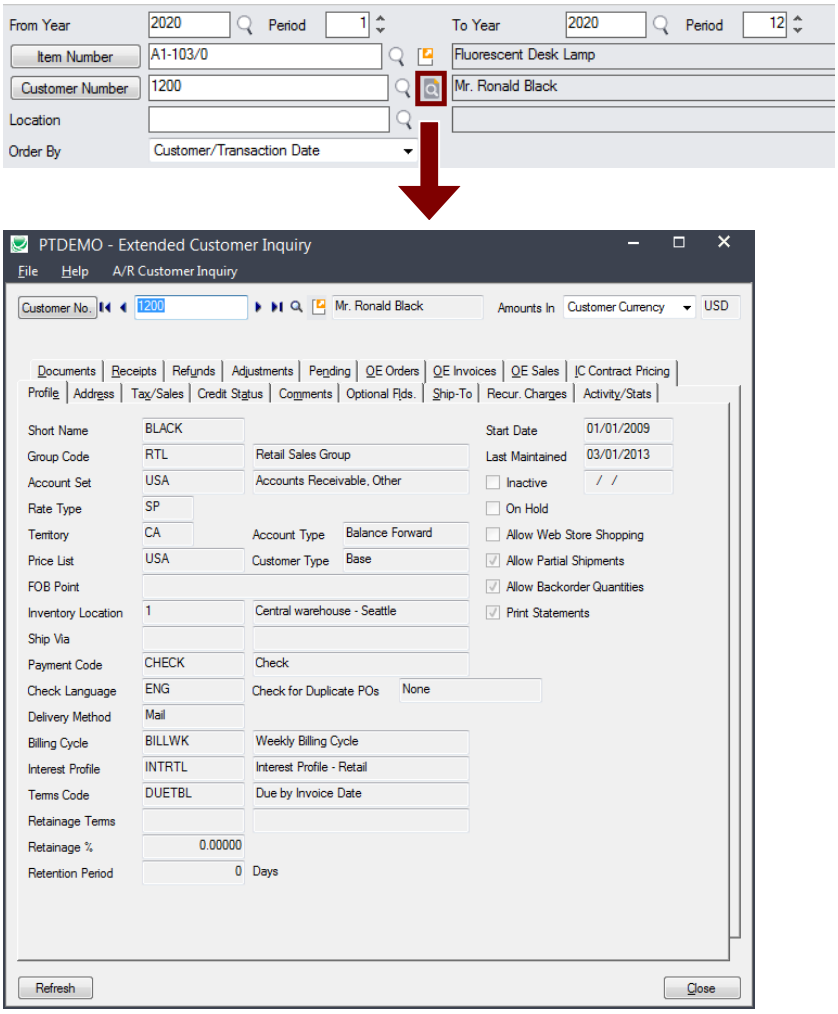

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