



# Global 3000 Service Pack Note

## Customer/Supplier List - Restrict By Creation Date

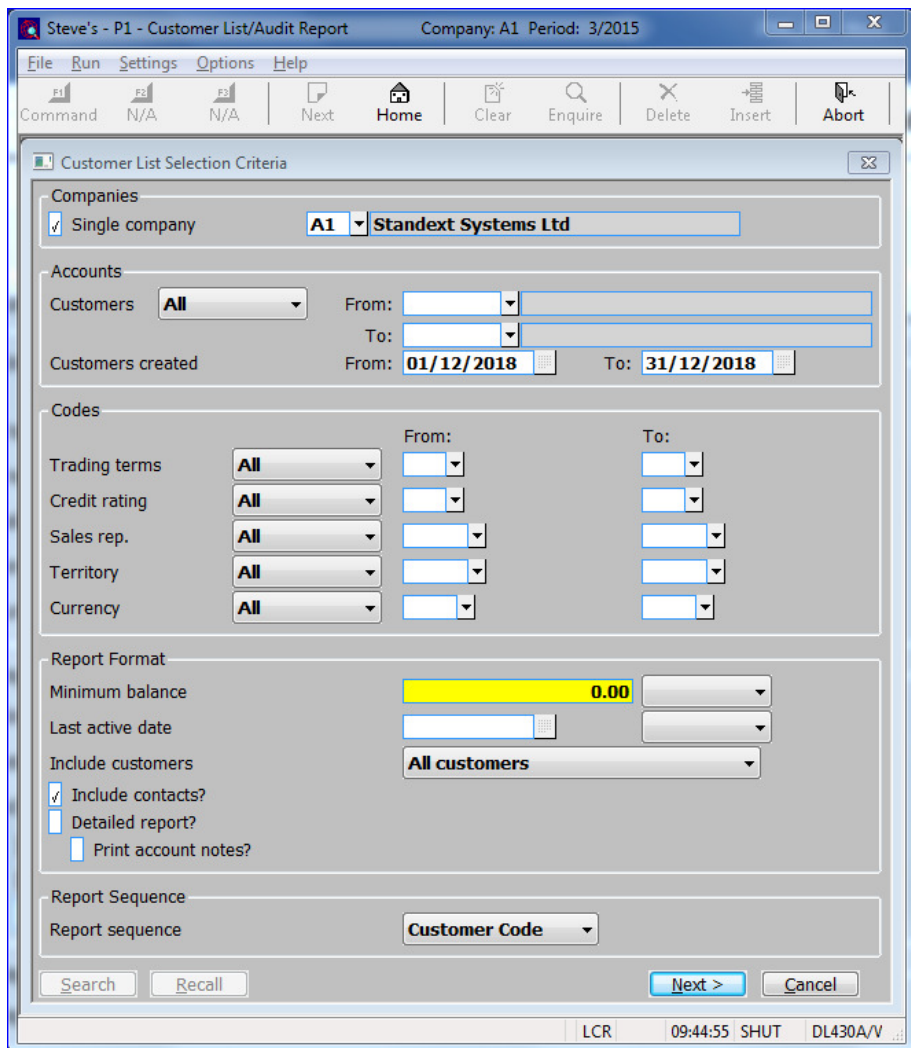
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## INTRODUCTION

These service packs provide the ability to restrict the customer and supplier list reports by account creation date.

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## Customer List – Selection Criteria Window



### Companies

**Single company** (Multi-company systems only.)  to restrict report to a specific company. Leave blank for all companies.

**Company** (Only if Single Company report Selected.) Enter the code of the required company. A [Search] pop-up enquiry is available.

### Accounts

**Customers** Select from a drop down menu:

- **All** – Select all customer accounts.
- **Single** – Restrict report to a single customer.
- **Range** – Restrict report to a range of customers.

**From:** (Only for a 'Single' or 'Range' of customers) – Select the first or only customer to be included in the report. A [Search] pop-up enquiry is available.

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- To:** *(Only for a 'Range' of customers)* – Select the last customer to be included in the report. A [Search] pop-up enquiry is available.
- Customers created From** *(Not for a single customer)* – Set this to limit the report to include accounts created after this date. Leave blank to select from earliest.
- To** *(Not for a single customer)* – Set this to limit the report to include accounts created before this date. Leave blank for no end date.

## Codes

- Trading terms** Select from a drop down menu:
- **All** – Select all trading terms.
  - **Single** – Restrict report to a single trading term.
  - **Range** – Restrict report to a range of trading terms.
- From:** *(Only for a 'Single' or 'Range' of trading terms)* – Select the first or only trading term to be included in the report. A [Search] pop-up enquiry is available.
- To:** *(Only for a 'Range' of trading terms)* – Select the last trading term to be included in the report. A [Search] pop-up enquiry is available.
- Credit rating** Select from a drop down menu:
- **All** – Select all credit ratings.
  - **Single** – Restrict report to a single credit rating.
  - **Range** – Restrict report to a range of credit ratings.
- From:** *(Only for a 'Single' or 'Range' of trading terms)* – Select the first or only credit rating to be included in the report. A [Search] pop-up enquiry is available.
- To:** *(Only for a 'Range' of trading terms)* – Select the last credit rating to be included in the report. A [Search] pop-up enquiry is available.
- Sales rep.** Select from a drop down menu:
- **All** – Select all sales reps.
  - **Single** – Restrict report to a single sales rep.
  - **Range** – Restrict report to a range of credit ratings.
- From:** *(Only for a 'Single' or 'Range' of sales reps)* – Select the first or only sales rep to be included in the report. A [Search] pop-up enquiry is available.
- To:** *(Only for a 'Range' of sales reps)* – Select the last sales rep to be included in the report. A [Search] pop-up enquiry is available.
- Territory** Select from a drop down menu:
- **All** – Select all territories.
  - **Single** – Restrict report to a single territory.
  - **Range** – Restrict report to a range of territories.
- From:** *(Only for a 'Single' or 'Range' of territories)* – Select the first or only territory to be included in the report. A [Search] pop-up enquiry is available.
- To:** *(Only for a 'Range' of territories)* – Select the last territory to be included in the report. A [Search] pop-up enquiry is available.

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- Currency** Select from a drop down menu:
- **All** – Select all currencies.
  - **Single** – Restrict report to a single currency.
  - **Range** – Restrict report to a range of currencies.
- From:** *(Only for a 'Single' or 'Range' of currencies)* – Select the first or only currency to be included in the report. A [Search] pop-up enquiry is available.
- To:** *(Only for a 'Range' of currencies)* – Select the last currency to be included in the report. A [Search] pop-up enquiry is available.

## Report Format

**Minimum balance** Enter a minimum value that you want to restrict the selection to customers whose balance is above or below. Otherwise leave blank.

*(Only if a minimum balance entered)* – Select from a drop down menu:

- **Greater** – Restrict the selection to customers whose current balance is greater than the minimum balance entered at the previous prompt.
- **Lesser** – Restrict the selection to customers whose current balance is equal to or less than the minimum balance entered at the previous prompt.

**Last active date** Set this to restrict the list to accounts with no transactions dated after this date, or to exclude from the list accounts with no transactions dated after this date. See Include/Exclude below.

*(Only if a last active date entered)* – Select from a drop down menu:

- **Include** – Restrict the selection to accounts having no transactions on or after the date entered at the previous prompt.
- **Exclude** – Restrict the selection by excluding accounts having no transactions on or after the date entered at the previous prompt.

**Include customers** Restrict customers by account status. Select from a drop down menu:

- **All customers** – No restrictions by account status.
- **Only 'Active' customers** – Restrict report to accounts with an account status of 'Active'.
- **Only 'Inactive' customers** – Restrict report to accounts with an account status of 'Inactive'.
- **Only 'Suspended' customers** – Restrict report to accounts with an account status of 'Suspended'.

**Include contacts?** ✓ to include contact information in the report. All contacts for the customers are printed.

**Detailed Report?** ✓ to print the detailed report or leave blank for the summary report.

### *Please Note*

The summary report consists of one line per customer (If contacts are included then these are in addition to the single line of information). The detailed version also shows each customer's invoice address and main contact details.

**Print account notes?** *(Only if the detailed report is selected).* – ✓ to include customer account notes on the report.

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## Report Sequence

### Report sequence

This menu enables you to select the sequence of the details which are to be printed. Select from a drop down menu:

- **Customer Code.**
- **Customer Name.**
- **Credit Rating** – (Only for single company reports).
- **Sales Rep** – (Only for single company reports).
- **Currency** – (Not available for single currency sites).

## Application Button

### Recall

(Only at the 'Customers' and 'Customers From' prompts. Make the selection via a 'named list' instead of through the selection options in this window. A pop-up enquiry appears listing existing named lists

## Supplier List – Selection Criteria Window

## Companies

**Single Company** (Multi-company systems only.)  to restrict report to a specific company. Leave blank for all companies.

**Company** (Only if Single Company report Selected.) Enter the code of the required company. A [Search] pop-up enquiry is available.

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## Accounts

- Suppliers** Select from a drop down menu:
- **All** – Select all supplier accounts.
  - **Single** – Restrict report to a single supplier.
  - **Range** – Restrict report to a range of suppliers.
- From:** *(Only for a 'Single' or 'Range' of suppliers)* – Select the first or only supplier to be included in the report. A [Search] pop-up enquiry is available.
- To:** *(Only for a 'Range' of supplier)* – Select the last supplier to be included in the report. A [Search] pop-up enquiry is available.
- Suppliers created** *(Not for a single supplier)* – Set this to limit the report to include accounts created after this date. Leave blank to select from earliest.
- From:**
- To:** *(Not for a single supplier)* – Set this to limit the report to include accounts created before this date. Leave blank for no end date.

## Codes

- Trading terms** Restrict the selection to suppliers with particular trading terms. Select from a drop down menu:
- **All** – Select all trading terms.
  - **Single** – Restrict report to a single trading term.
  - **Range** – Restrict report to a range of trading terms.
- From:** *(Only for a 'Single' or 'Range' of trading terms)* – Select the first or only trading term to be included in the report. A [Search] pop-up enquiry is available.
- To:** *(Only for a 'Range' of trading terms)* – Select the last trading term to be included in the report. A [Search] pop-up enquiry is available.
- Priorities** Restrict the selection to suppliers with particular priority codes. Select from a drop down menu:
- **All** – Select all priorities.
  - **Single** – Restrict report to a single priority.
  - **Range** – Restrict report to a range of priorities.
- From:** *(Only for a 'Single' or 'Range' of priorities)* – Select the first or only priority to be included in the report. A [Search] pop-up enquiry is available.
- To:** *(Only for a 'Range' of priorities)* – Select the last priority to be included in the report. A [Search] pop-up enquiry is available.
- Types.** Restrict the selection to suppliers of particular supplier types. Select from a drop down menu:
- **All** – Select all supplier types.
  - **Single** – Restrict report to a single supplier type.
  - **Range** – Restrict report to a range of supplier types.
- From:** *(Only for a 'Single' or 'Range' of supplier types)* – Select the first or only supplier type to be included in the report. A [Search] pop-up enquiry is available.
- To:** *(Only for a 'Range' of supplier types)* – Select the last supplier type to be included in the report. A [Search] pop-up enquiry is available.

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**Currency** Restrict the selection to suppliers by trading currencies. Select from a drop down menu:

- **All** – Select all currencies.
- **Single** – Restrict report to a single currency.
- **Range** – Restrict report to a range of currencies.

**From:** *(Only for a 'Single' or 'Range' of currencies)* – Select the first or only currency to be included in the report. A [Search] pop-up enquiry is available.

**To:** *(Only for a 'Range' of currencies)* – Select the last currency to be included in the report. A [Search] pop-up enquiry is available.

## Report Format

**Detailed report?** ✓ to print the detailed report or leave blank for the summary report.

*Please Note*

The summary report consists of one line per supplier (If contacts are included then these are in addition to the single line of information). The detailed version also shows additional information including the payment address and bank details.

**Include contacts?** *(Only if the detailed report is selected.)* – ✓ to include contact information in the report. All contacts for the suppliers are printed.

**Print account notes?** *(Only if the detailed report is selected.)* – ✓ to include supplier account notes on the report.

**Include 'Inactive' accounts?** ✓ to include accounts with a status of 'Inactive', otherwise restrict report to those accounts with a status of 'Active'

## Report Sequence

**Report sequence** This menu enables you to select the sequence of the details which are to be printed. Select from a drop down menu:

- **Supplier Code.**
- **Supplier Name.**
- **Priority.**
- **Trading Terms** – *(Only for single company reports).*
- **Currency** – *(Not available for single currency sites).*

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