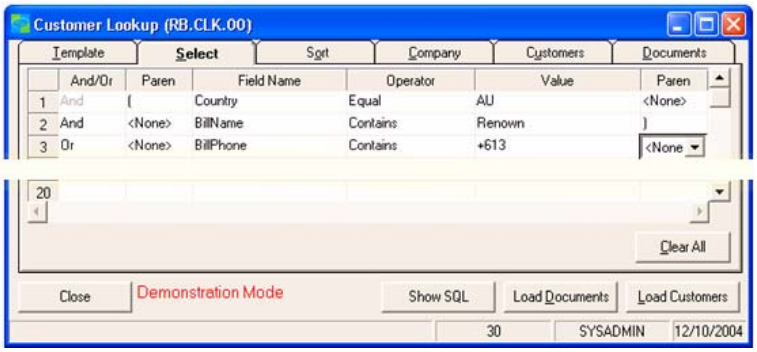
# RENOWN CUSTOMER SEARCH & INQUIRY

The Customer Lookup software for Microsoft™ Dynamics™ SL provides a number of features to assist with finding and analysing Customers and Documents. Features provided in the function include;

- Advanced Search facilities for Customers or Documents (Invoices, Credits, Receipts)
- Definition of Template Search criteria for faster data processing
- Definition of Security for data level user access control
- Customer/Document lists can be sorted by any field in the Customer/Document tables
- Provides Multi-company enquiry for users of the Multi-company module
- Drill down to Customer or Document Maintenance
- Improved layout of primary transactions and their associated applications
- Dynamic Aging of balances as at current date (Not last time AR Aging was run)
- Display consolidated Aging for all Selected Customers or Customer Groups

## ADVANCED SEARCH FACILITIES FOR CUSTOMER OR DOCUMENT (INVOICE, CREDIT, RECEIPT)

Similar to the ‘**Select**’ tab in Microsoft™ Dynamics™ SL reports, it is possible to define selection criteria to search for or filter specific customers or documents.



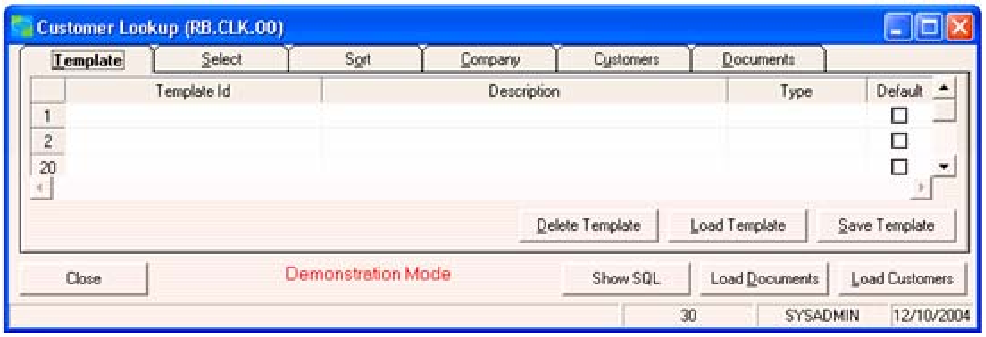
|  | And/Or | Paren | Field Name | Operator | Value | Paren |
|---|---|---|---|---|---|---|
| 1 | And | ( | Country | Equal | AU | <None> |
| 2 | And | <None> | BillName | Contains | Renown | ) |
| 3 | Or | <None> | BillPhone | Contains | +613 | <None |
| 20 |  |  |  |  |  |  |

a) Field names can be user defined
b) Value fields can have PV’s added
c) Parentheses are provided to allow complex selection criteria to be defined.
d) Save Templates for common criteria
e) An auto-load template can be defined for quick searches on common criteria

## DEFINITION OF TEMPLATE SEARCH CRITERIA FOR FASTER DATA PROCESSING

It is possible to enter details in the ‘**Select**’ and ‘**Sort**’ tabs. Switch to the ‘Template’ tab and save the defined ‘**Select**’ and ‘**Sort**’ criteria as a Template as per the standard Dynamics™ SL templates.

You can define a template as your personal default. The default automatically loads when you open the Look-up. Time is saved as users do not have to load their most common search criteria (CustID, Name, P/Code, Phone, Reference, Invoice)



## CUSTOMER / DOCUMENT SORTED ORDER

Use the '**Sort**' tab to define the sort order that Customers or Documents are displayed in. Customer/Document lists can be re-sorted in any way you like by changing the Sort Criteria and pressing the Load buttons to reload the data in the new sort order.

## CUSTOMER/DOCUMENT DRILL DOWN

Buttons are available to drill down to the related Customer or Document Maintenance screens. Highlight the Customer or Document and click the applicable button.

## DYNAMIC AGING AS AT CURRENT DATE

The Aged Balances are dynamically calculated as the Documents are loaded. The Aging is for the current position of the Account or Group of Accounts. It is possible to select any Statement Cycle for the Aging regardless of the Cycle defined against the Customer.

## MULTI-COMPANY INQUIRY

If the Multi-company module is installed the Company tab is made available allowing users to select which companies to include in searches. Works as per standard multi-company inquiries.

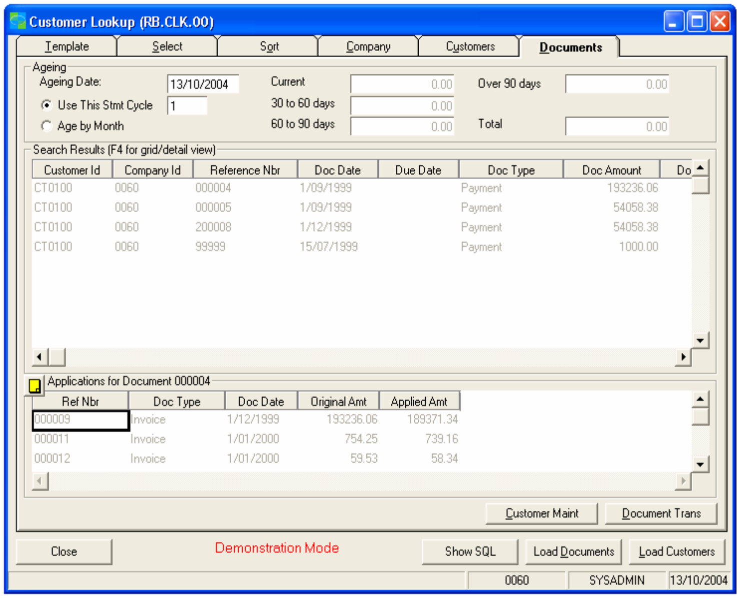
○ Current Company
● Selected Companies
☐ Show Active Companies Only

| | Selected | Company Id | Company Name | Active |
|---|---|---|---|---|
| 1 | ☒ | 10 | GJL J&L Major | ☒ |
| 2 | ☐ | 20 | GJL J&L | ☒ |

## DISPLAY CONSOLIDATED AGING

This allows Aging to be analysed for any group of Customers. In the '**Select**' tab choose to filter on a single Sales Rep. and the Aged totals will show that Rep's collection performance. Filter on Class, Territory or other group to get aggregated aging totals. You can also pick a single Customer.

## IMPROVED LAYOUT OF PRIMARY TRANSACTIONS AND THEIR ASSOCIATED APPLICATIONS



Ageing
Ageing Date: 13/10/2004
● Use This Stmt Cycle 1
○ Age by Month
Current 0.00
30 to 60 days 0.00
60 to 90 days 0.00
Over 90 days 0.00
Total 0.00

Search Results (F4 for grid/detail view)

| Customer Id | Company Id | Reference Nbr | Doc Date | Due Date | Doc Type | Doc Amount | Do |
|---|---|---|---|---|---|---|---|
| CT0100 | 0060 | 000004 | 1/09/1999 | | Payment | 193236.06 | |
| CT0100 | 0060 | 000005 | 1/09/1999 | | Payment | 54058.38 | |
| CT0100 | 0060 | 200008 | 1/12/1999 | | Payment | 54058.38 | |
| CT0100 | 0060 | 99999 | 15/07/1999 | | Payment | 1000.00 | |

Applications for Document 000004

| Ref Nbr | Doc Type | Doc Date | Original Amt | Applied Amt |
|---|---|---|---|---|
| 000009 | Invoice | 1/12/1999 | 193236.06 | 189371.34 |
| 000011 | Invoice | 1/01/2000 | 754.25 | 739.16 |
| 000012 | Invoice | 1/01/2000 | 59.53 | 58.34 |

Demonstration Mode

0060 SYSADMIN 13/10/2004

The Documents display is split into two grids - Documents and their associated Applications.

- Top grid shows the Documents filtered in the '**Select**' tab.
- Bottom grid shows Applications to the Document selected in the Top grid. As you scroll down the records in the Top grid, the Bottom grid changes to the respective Applications.

Select Criteria can be defined to display just the payments for a Customer. The bottom grid will then show the Invoices, Debits and Credits the payment was applied to.

Buttons are available to drill-down to Document Maintenance for more information, if needed.