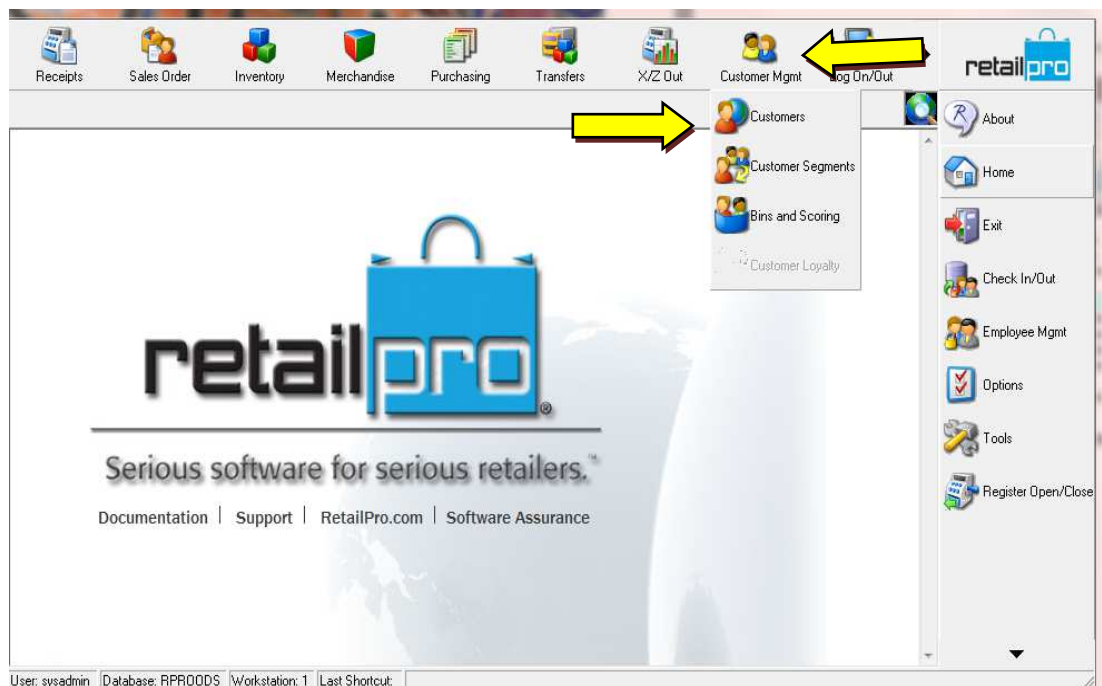




Customer History February, 2015 Retail Pro v9

In Retail Pro v9 you **View** and **Print** a **Customer's History**. (Note: you can set the number of History months available: Go to **Customer Mgmt**, then **Customers**, then **Date Range**, where you can set **the time period (Date Range)** you want the History to cover.)

1. We will start with **Viewing** a **Customer's History**. First go to **Customer Mgmt** on the Top Menu, then **Customers** on the drop down menu.



2. Next we will locate the **Customer** we want to **View**.

Subsidiary: 001

Active <All> Last Name First Name

Cust ID	Last	First	Checks	Exported AR	Chrg Lmt	Chrg Bal	Str Credit	Edit Dt + Time Zone
1	Smith	Bob	<input checked="" type="checkbox"/>	Yes	0.00	0.00	\$0.00	4/29/2014 10:32:46 AM -
2	Franklin	Darrell	<input checked="" type="checkbox"/>	Yes	1000.00	0.00	\$0.00	9/3/2014 4:59:23 PM -07
3	Mouse	Mickey	<input checked="" type="checkbox"/>	Yes	0.00	0.00	\$0.00	12/4/2014 9:30:02 AM -0
5	Mouse	Minnie	<input checked="" type="checkbox"/>	Yes	0.00	0.00	\$0.00	12/4/2014 9:30:02 AM -0
8	Brown	Jennifer	<input checked="" type="checkbox"/>	Yes	1000.00	0.00	\$0.00	12/4/2014 9:30:02 AM -0

Customer Lookup Contact Information User Defined Credit Info

Help Next Previous Date Range Filtered View Cancel Filter Show Customers History Profile

3. Now I will click on **History** to see this **Customer's History**.

SO History Print

Sales History > Sub: All From: 12/1/2012 To: 12/31/2014

Customer Information

Last Name: Smith
 First Name: Bob
 Sale Price: \$167.80
 Return Price: \$0.00
 Sale Quantity: 2
 Return Quantity: 0
 Sales Receipt Count: 3
 Return Receipt Count: 0
 Average \$ per Receipt: \$95.65
 Net Sales T\$: \$13.42

Receipt

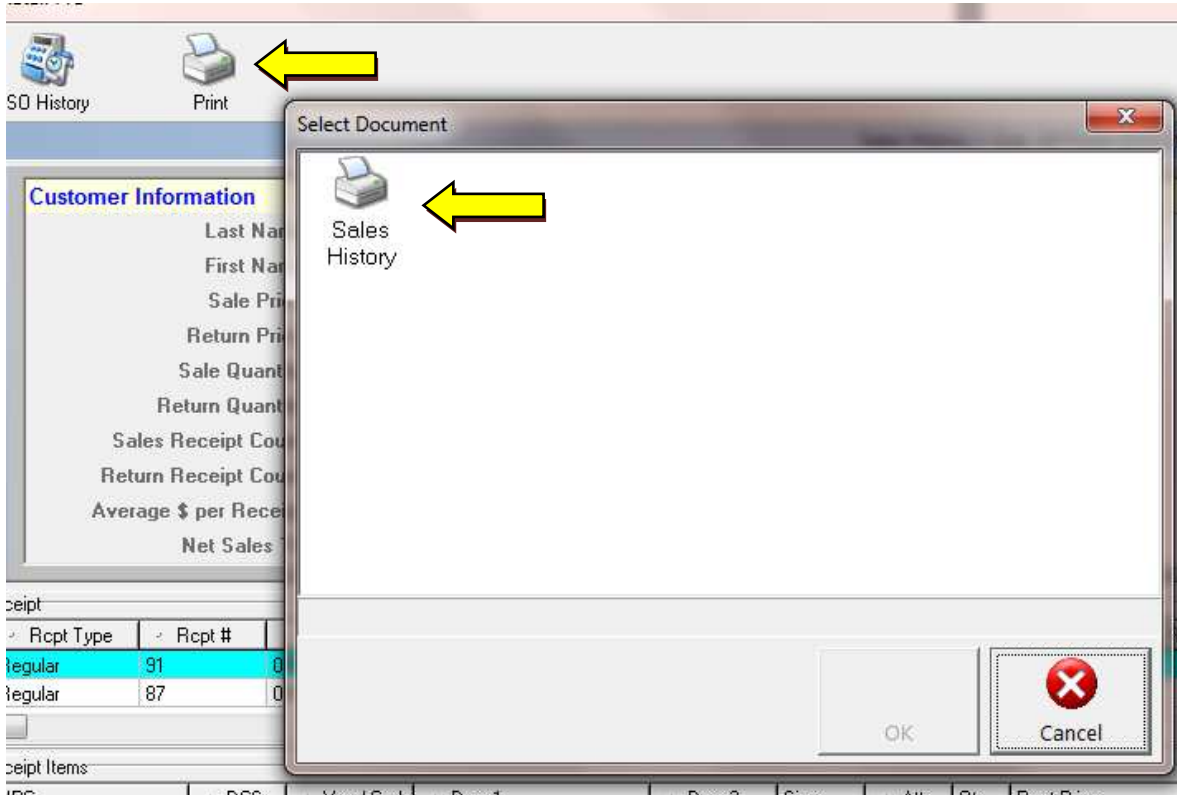
Rcpt Type	Rcpt #	Store	Create Dt	Cashier	Bill To	Tender Type
Regular	56	001	5/8/2014 7:31:24 AM	SYSADMIN	Bob Smith	Charge
Regular	32	001	11/5/2013 1:43:59 PM	SYSADMIN	Bob Smith	Check
Regular	22	001	11/1/2013 7:28:21 AM	SYSADMIN	Bob Smith	Charge

Receipt Items

UPC	DCS	Vend Code	Desc1	Desc2	Size	Attr	Qty	Rcpt Price
0000000000949		MENSHOS	CONV	HIGH TOPS	9.5	BLACK	1	\$8

Help Next Previous Date Range Go To Document Document OK Cancel Selection

4. You can Select any Receipt in the middle portion and view the receipt items in the bottom portion of the window.
5. You can Click **Print** on the top tool bar and **Sale History** to print out a Summary of the **Customer History** and a list of Customer Transactions.



First Name Bob

Last Name Smith

Sales Info

Sale Qty 2 Sale Prices \$167.80 Sale Prices WT \$181.22 Sale Fee \$105.73

Return Info

Return Qty 0 Return Price \$0.00 Return Price WT \$0.00 Return Fee \$0.00

Total

Total Qty 2 Total Price \$167.80 Total Price WT \$181.22 Total Fee \$105.73

Receipt SID -3156982866355277227	ReceiptTotal \$75.49	ReceiptType Regular	Status 0	Created Date 5/8/2014 7:31:24AM
Receipt SID -3857365507128093863	ReceiptTotal \$105.73	ReceiptType Regular	Status 0	Created Date 11/5/2013 1:43:59 PM
Receipt SID -3873178260913480592	ReceiptTotal \$105.73	ReceiptType Regular	Status 0	Created Date 11/1/2013 7:28:21 AM