



December, 2012

How to Edit the Number of Customer History Months Shown in Retail Pro v8

Retail Pro can show a specified number of months of customer data depending on what is set in system preferences. The default is 1 month, but can be as high as 999 months.

The screenshot shows the 'Customers > Customer History' window for 'A RICHARD BALDISSERI'. It displays summary statistics and a list of receipts.

| Receipt amounts | | Receipt Counts | | Item Counts | |
|-----------------|-------|----------------------|---|-----------------|---|
| Purchase \$ | 17.36 | Sales Receipt Count | 1 | Units Purchased | 1 |
| Return \$ | 0.00 | Return Receipt Count | 0 | Units Returned | 0 |
| Discount \$ | 0.00 | Total Receipt Count | 1 | | |
| Avg \$/Receipt | 17.36 | | | | |

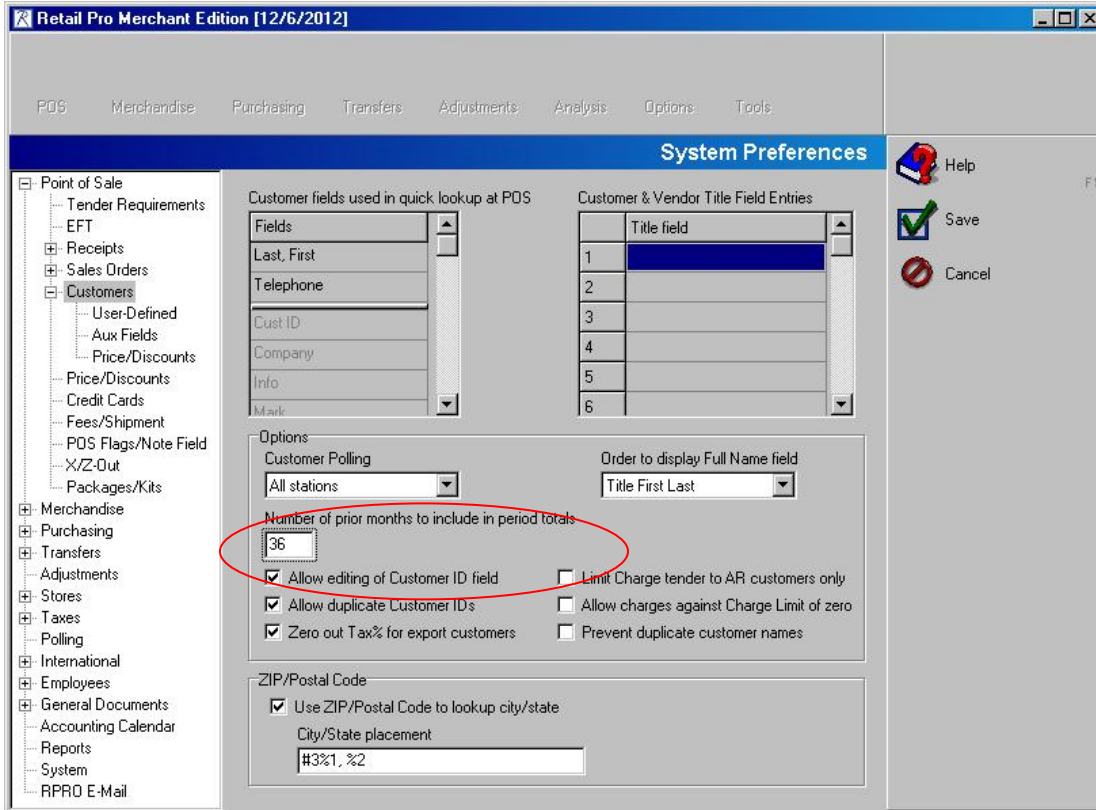
| Receipt Status | Receipt # | Date | Cashier | Disc % | Shipping | Tax \$ | Total | Tender |
|----------------|-----------|-----------|---------|--------|----------|--------|-------|--------|
| Regular | 1024 | 12/6/2012 | Admin | 0.0000 | 0.00 | 1.36 | 17.36 | Cash |

| Item # | DCS | Vend... | Desc 1 | Attr | Size | Qty | Disc \$ | Rcpt P\$ |
|--------|-----------|---------|--------------------|------|------|-----|---------|----------|
| 5 | FIX-AC... | BEN | Boo Boo Zap! (OTC) | | | 1 | | 16.00 |

User: Admin Progress: Finished Find: WS48

You can see that only 1 month of data is being shown even though the customer has data from last year

2) If you go into Options → system preferences → Expand POS → and click on ‘Customers’, you will see a field called “Number of prior months to include in period totals.” By editing this field you can tell the system the number of months to show in the customer history tab.



3) After editing the number of months from 1 to 36, you can now see the previous history of the customer.

Receipt amounts

| | |
|-----------------------|-------|
| Purchase \$ | 28.21 |
| Return \$ | 0.00 |
| Discount \$ | 0.00 |
| Avg \$/Receipt | 14.11 |

Receipt Counts

| | |
|----------------------------|---|
| Sales Receipt Count | 2 |
| Return Receipt Count | 0 |
| Total Receipt Count | 2 |

Item Counts

| | |
|-----------------|---|
| Units Purchased | 2 |
| Units Returned | 0 |

Receipts [100%]

| Receipt Status | Receipt # | Date | Cashier | Disc % | Shipping | Tax \$ | Total | Tender |
|----------------|-----------|-----------|---------|--------|----------|--------|-------|--------|
| Regular | 1024 | 12/6/2012 | Admin | 0.0000 | 0.00 | 1.36 | 17.36 | Cash |
| Regular | 1025 | 12/6/2011 | Admin | 0.0000 | 0.00 | 0.85 | 10.85 | Cash |

Receipt Items [100%]

| Item # | DCS | Vend... | Desc 1 | Attr | Size | Qty | Disc \$ | Rcpt P\$ |
|--------|-----------|---------|-------------------|------|------|-----|---------|----------|
| 9 | FAKERI... | BEN | They're Real Mini | | | 1 | | 10.00 |

User: Admin Progress: Finished Find: WS48