Viewing/Copying Historical Documents on Palladium Enterprise

This feature is currently available on the Palladium Enterprise 2012 Version only.

FEATURE OVERVIEW

This feature allows you to view history for customers as well as suppliers as a reference or alternatively to copy the data to the current processing document.

How does this feature assist your business?

- ✓ It provides a quick view into Customer and Supplier Sales and Purchases history and trends.
- ✓ Saves time when processing new orders or invoices by copying from previously processed invoices.

The following documents offer the ability to View/Copy History

Accounts Payable

- ✓ Purchase Requisitions
- ✓ Purchase Orders
- ✓ Purchase Invoices

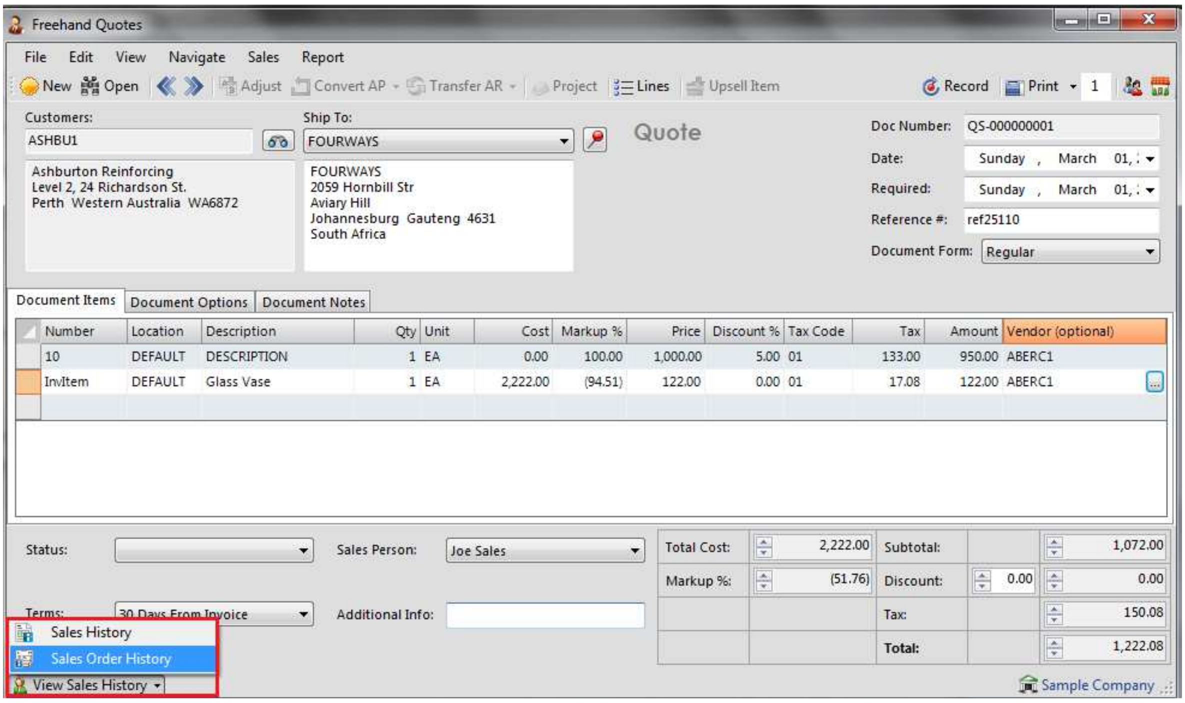
Accounts Receivable

- ✓ Freehand Quotes
- ✓ Quotes
- ✓ Sales Orders
- ✓ Sales Invoices

FEATURE OPTIONS

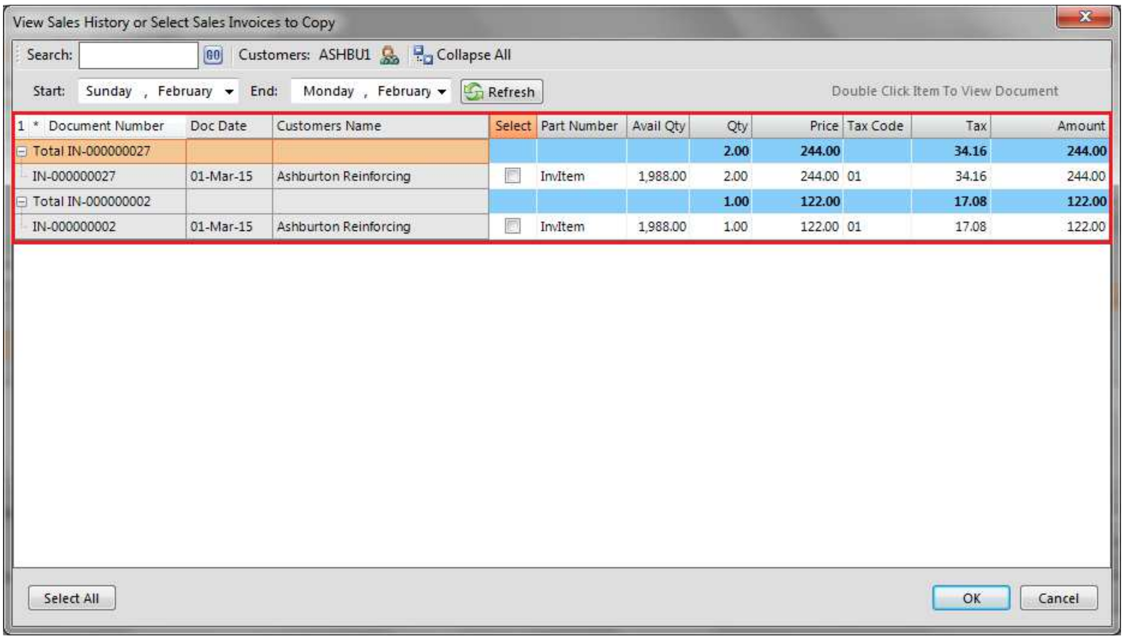
Process a Document and View History

When you process a new document, you have the option to view history as displayed below with the option to select either the Order or Invoice history.



Accessing Historical Documents

On this screen you have the ability to view the Sales or Purchases history. In addition, this screen gives you the ability to copy lines from one or more documents and to drill-down and view the full document if required.



Navigating through Historical Documents

You may search for documents for a different customer or supplier by entering text within a customer (supplier) code, or when you click on the customer filter option as indicated below. A list of all customers (suppliers) is displayed allowing you to simply select the required customer (supplier).

When there are multiple documents you have the option to Expand All which will display all the lines within the various documents.

The Collapse All option will display the document headers only.

Copying the Required Information Across

When you are satisfied with the information you have selected to copy or use as a reference, click on OK, your selection is copied to the document you are processing in. If you want to view the document you are copying before making a selection, double-click on the document line and it will be displayed on the screen in the form of a drill-down. This could be to simply view a customer's previous transactions or to create that "personal touch".