

A RETAILER'S BEST FRIEND.



Customer History

Retail Pro Version 9

https://youtu.be/EQy4c_RO9bl

Using Retail Pro Version 9, you can easily view a customer's entire purchase and return history, and pull up and print any past documents associated with that customer from one place.

To view customer history in Retail Pro V9:

1. Navigate to the Customers module
Customer Management > Customers
Highlight desired customer and select "History" from the side menu.

The screenshot shows the Retail Pro software interface. At the top, there is a toolbar with icons for New, Inactivate, Edit, Cancel, Copy, Form View, Print, and Review Report. Below the toolbar, the breadcrumb navigation reads "Customers > Sub: 001 Active Only". A search bar is present with "Subsidiary: 001" and filters for "Active" and "All". A table of customers is displayed with columns for Last, First, Phone1, Phone2, Last Sale Dt, Str Credit, Lty Lvl, Lty Opt in, Lty Balance, Lty Enroll Date, and Prc Lv. The first row, "Martinez Liz", is highlighted in blue. A red arrow points to this row. On the right side, a vertical menu contains options: Help, Next, Previous, Date Range, Filtered View, Cancel Filter, Show Customers, History, and Profile. The "History" option is circled in red, and a red arrow points to it from the right.

Customer	Last	First	Phone1	Phone2	Last Sale Dt	Str Credit	Lty Lvl	Lty Opt in	Lty Balance	Lty Enroll Date	Prc Lv
Martinez	Liz		(916) 368-3939		2/10/2020	\$0.00		<input type="checkbox"/>	0		
Da Vinci	Leonardo		916-555-1212	916-555-1212	2/3/2020	\$0.00		<input type="checkbox"/>	0		VIP
Shakespeare	William		907-555-1212		1/31/2020	\$0.00		<input type="checkbox"/>	0		
Boleyn	Anne		619-555-1212		2/19/2010	\$0.00		<input type="checkbox"/>	0		
Polo	Marco		858-555-1212	858-555-1212	3/13/2010	\$0.00		<input type="checkbox"/>	0		VIP
Gallei	Galleo		530-555-1212		8/22/2009	\$0.00		<input type="checkbox"/>	0		
Madison	Dorthea		202-555-1212		2/19/2010	\$0.00		<input type="checkbox"/>	0		
Newton	Issac		916-555-1212		9/21/2009	\$0.00		<input type="checkbox"/>	0		Employ
Murakami	Hiro				2/26/2013	\$0.00		<input type="checkbox"/>	0		
Maas	Sue				12/6/2012	\$0.00		<input type="checkbox"/>	0		
						\$0.00		<input type="checkbox"/>	0		
						\$0.00		<input type="checkbox"/>	0		
						\$0.00		<input type="checkbox"/>	0		
						\$0.00		<input type="checkbox"/>	0		
						\$0.00		<input type="checkbox"/>	0		



2. From this screen you can see a breakdown of information for this customer and associated receipts in the table below.

Customer Information

Last Name	Martinez
First Name	Liz
Sale Price	\$923.92
Return Price	\$136.49
Sale Quantity	12
Return Quantity	1
Sales Receipt Count	3
Return Receipt Count	1
Average \$ per Receipt	\$211.62
Net Sales T\$	\$69.29

Receipts

Rcpt Type	Rcpt #	Store	Create Dt	Cashier	Bill To	Tender Type	Rcpt Total
Regular	19	SFD	2/10/2020 9:19:21 AM	SYSADMIN	Liz Martinez	Cash	\$53.19
Return	18	SFD	2/10/2020 9:11:03 AM	SYSADMIN	Liz Martinez	Cash	\$146.73
Regular	17	SFD	2/10/2020 9:08:13 AM	SYSADMIN	Liz Martinez	Credit Card	\$620.80
Regular	16	SFD	2/10/2020 9:05:58 AM	SYSADMIN	Liz Martinez	Cash	\$289.67

Receipt Items

UPC	DCS	Vend Code	Desc1	Desc2	Size	Attr	Qty	Rcpt Price	Ext Rcpt Price
0000000050050	EQP	CHA	INDOOR SOCCER BALL	3 STAR	4		1	\$29.99	\$29.99
0000000088886	MENJER	ADD	TROPHEO SOCCER BALL				1	\$19.49	\$19.49

3. Details for a specific receipt can be viewed but selecting the desired receipt and utilizing the Receipt Items table.

Receipt Items

UPC	DCS	Vend Code	Desc1	Desc2	Size	Attr	Qty	Rcpt Price	Ext Rcpt Price
0000000050050	EQP	CHA	INDOOR SOCCER BALL	3 STAR	4		1	\$29.99	\$29.99
0000000088886	MENJER	ADD	TROPHEO SOCCER BALL				1	\$19.49	\$19.49

This table shows all items listed on the highlighted receipt from the Receipt Table above.



4. Using the Document print option will reprint the current highlighted receipt. Using the Print button on top of the screen will print a summary of the customer history (Big Hairy Dog provided DocDesigns are available!)

Customer Information

Last Name	Martinez
First Name	Liz
Sale Price	\$2172.87
Return Price	\$202.48
Sale Quantity	22
Return Quantity	2
Sales Receipt Count	15
Return Receipt Count	2
Average \$ per Receipt	\$123.13
Net Sales T\$	\$162.97

Receipt

Rcpt Type	Rcpt #	Store	Create Dt	Cashier	Bill To	Tender Type	Rcpt Total
Regular	15	LAX	2/10/2020 12:29:54 PM	SYSADMIN	Liz Martinez	Split	\$130.61
Regular	12	LAX	2/10/2020 12:24:39 PM	SYSADMIN	Liz Martinez	Cash	\$35.46
Regular	11	LAX	2/10/2020 12:20:44 PM	SYSADMIN	Liz Martinez	Cash	\$35.46
Regular	10	LAX	2/10/2020 11:25:27 AM	SYSADMIN	Liz Martinez	Cash	\$325.71
Regular	9	LAX	2/10/2020 11:15:58 AM	SYSADMIN	Liz Martinez	Store Credit	\$-25.00
Regular	8	LAX	2/10/2020 11:15:26 AM	SYSADMIN	Liz Martinez	Cash	\$25.00

Receipt Items

UPC	DCS	Vend Code	Desc1	Desc2	Size	Altr	Qty	Rcpt Price	Ext Rcpt Price
0000000000420		MENAPPTJS	REVIVAL JERSEY POLO	MRE3912	MED	HEATGRE	1	\$121.50	\$121.50

4. SO related information for this customer can be found by clicking the “SO History” button from Customer History.

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Receipt

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Receipt Items

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0000000050050		EQPXXXCHA	INDOOR SOCCER BALL	3 STAR	4		1	\$29.99	\$29.99
0000000088886		MENJERXADD	TROPHEO SOCCER BALL				1	\$19.49	\$19.49



Retail Pro

Use Sales History Button to return to Sales History.

SO History > Sub: All

Customer Information

Last Name	Martinez
First Name	Liz
Average per SO	0.00
Quantity Ordered	3.00
Quantity Sent	0.00
Total	0.00
Deposit Balance	0.00

Sales Order

SO#	SO Type	Ord Dt	Cashier	Bill To Full Name	Bal Due	Dep Bal	Sale Recorded
0002000000001	Layaway	2/10/2020 9:13:03 AM	SYSADMIN	Liz Martinez	\$1274.92	\$0.00	<input type="checkbox"/>

SO Items

UPC	DCS	Vend Code	Desc1	Size	Attr	Price	Qty	Qty Due	Qty Sent
0000000020	WOMFTW	COL	TENACITY II	8.5	BLACK	\$138.99	1	1	0
0000000030	BRFCRYH	RIM	ATTACHE NOTEBOOK - S		COPPER	\$910.49	1	1	0
0000000030	LUGTNK	TITAN	STEEL TRUNK	LRG	BLUE	\$136.49	1	1	0

*Any related SO information will be displayed and summarized just as it is for sales and return information.

