

SAGE BUSINESS CLOUD ACCOUNTING

QUICK VIEWS - USER MANUAL

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Quick Views

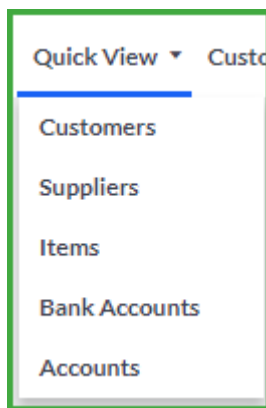
Accounting allows you to quickly view customer, supplier, item, account and bank account information, while you are processing documents and/or transactions.

There are various ways of accessing these Quick Views, namely via the:

- Quick View Menu
- Master File selection field
- Master File Maintenance Screen

Quick View Menu

The Quick View menu lists the different types of information you can view.



Select the master file from the menu.

The following screen displays:

Customer Quick View ✕

Name: * Morningview Bicycles [Edit this customer](#)

Contact Name: **John Smith**

Email: johnsmith@morningview.co.za

Telephone: +27 11 555-3039

Mobile: +27 83-555-0098

Balance: R 3,199,938.00

Amount Outstanding: R 3,199,938.00

Sales this year: R 2,764,750.00

Total Pending Quotes: 0

Value of Pending Quotes: R 0.00

Total Expired Quotes: 3

Overview

Invoices

All Transactions

Quotes

Recent Transactions

detail	26/07/2017	Tax Invoice	R 2,052.00
detail	25/07/2017	Tax Invoice	R 30,780.00
detail	24/07/2017	Tax Invoice	R 30,780.00
detail	22/06/2017	Tax Invoice	R 1,624.50
detail	19/06/2017	Tax Invoice	R 1,624.50

Quick Reports

[Customer Statement](#)

[Customer Sales](#)

Customer Sales History [Show Settings](#)

Customer Days Outstanding

Close

The system will populate the information of the selected master file record in the grid.

Customer Quick View ✕

Name: *Morningview Bicycles [Edit this customer](#)

Contact Name: John Smith

Email: johnsmith@morningview.co.za

Telephone: +27 11 555-3039

Mobile: +27 83-555-0098

Balance: R 3,199,938.00

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Total Pending Quotes: 0

Value of Pending Quotes: R 0.00

Total Expired Quotes: 3

Overview **Invoices** All Transactions Quotes

Unpaid Invoices Include Paid Invoices

	Date ▲	Document Number	Due Date	Antcp. Date	Total	Outstanding
detail <input type="checkbox"/>	01/03/2015	INV0000001	31/03/2015		R 73,872.00	R 73,872.00
detail <input type="checkbox"/>	14/04/2015	INV0000135	30/04/2015		R 51,300.00	R 51,300.00
detail <input type="checkbox"/>	15/05/2015	INV0000136	31/05/2015		R 80,940.00	R 80,940.00
detail <input type="checkbox"/>	15/06/2015	INV0000137	30/06/2015		R 108,300.00	R 108,300.00
detail <input type="checkbox"/>	09/07/2015	INV0000138	31/07/2015		R 456,000.00	R 456,000.00
detail <input type="checkbox"/>	30/07/2015	00010019	30/07/2015		R 200.00	R 200.00
detail <input type="checkbox"/>	30/07/2015	00010020	30/07/2015		R 200.00	R 200.00
detail <input type="checkbox"/>	30/07/2015	00010021	30/07/2015		R 200.00	R 200.00
detail <input type="checkbox"/>	30/07/2015	00010022	30/07/2015		R 200.00	R 200.00
detail <input type="checkbox"/>	30/07/2015	00010023	30/07/2015		R 200.00	R 200.00

Select All
Deselect All

Print Invoice
Email Invoice
Close

The Quick View screen details the latest transactional activity on the selected master file record. The balance displayed on the right hand side of the grid represents either an outstanding balance and/or current balance for the selected master file record. The screen also displays the Sales History and Customer Days Outstanding in a graph.

On all the other tabs, to view the original document or transaction, click on the detail link next to the document or transaction.

If you want to print or email all of the documents or transactions, click on the Select All button. To deselect your selection, click on the Deselect All button.

To print or email selective documents or transactions, check the check box next to any document or transaction that you want to print or email.

You also have the option to include your paid invoices and print them too.

After you have made your selection, select whether you want to print or email the documents or transactions, by clicking on the Print Invoices or Email Invoices button at the bottom of the screen.

To exit the Quick View screen, click on the Close button.