

# Reporting Sales to Smart Potatoes Software

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To report sales to Smart Potatoes you need to do the following setup:

1. At *Hub / Setup / Preferences / Customers* set a cross reference for Smart Potato ID.
2. At *Hub / Setup / Preferences / Customers* set a customer classification for Smart Potato.
3. At *Hub / Setup / Preferences / Products* set a product cross reference for Smart Potato ID (if necessary).
4. At *Accounting / File / Open / Customer*, enter the Smart Potato customer ID in the Smart Potato ID cross reference, and mark the Smart Potato Classification.
5. At *Accounting / File / Open / Product*, enter the *Smart Potato product ID* in the *Smart Potato ID* cross reference.
6. Set the manufacturer for all of your Smart Potato products (if not already set up).

After setup is complete, to report to Smart Potatoes go to the Chemical Rebate report at *Accounting Reports / Accounts Receivable / Sales / Product Rebate*.

1. At the Chemical Rebate report criteria screen filter for only the Smart Potato customers at *Select Customers*.
2. At *Select Products*, filter by manufacturer and select only Smart Potato products. You will need to do a report export for each Smart Potato manufacturer.
3. Select the *Smart Potato ID* cross reference for customers and products.
4. Check the *Show Detail* checkbox, and select the date range/invoice range/fiscal month range you are reporting.
5. Preview the report, and export into Excel. You can then e-mail the Excel spreadsheet to Smart Potatoes.