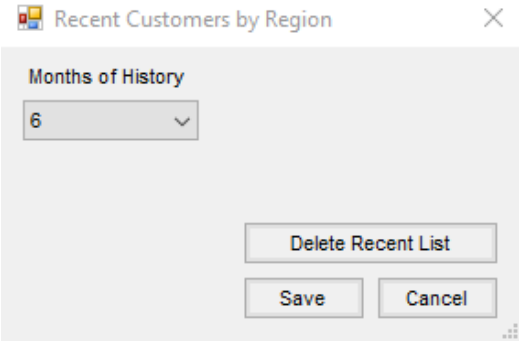


Recent Customers by Regions

Last Modified on 06/10/2024 3:19 pm CDT

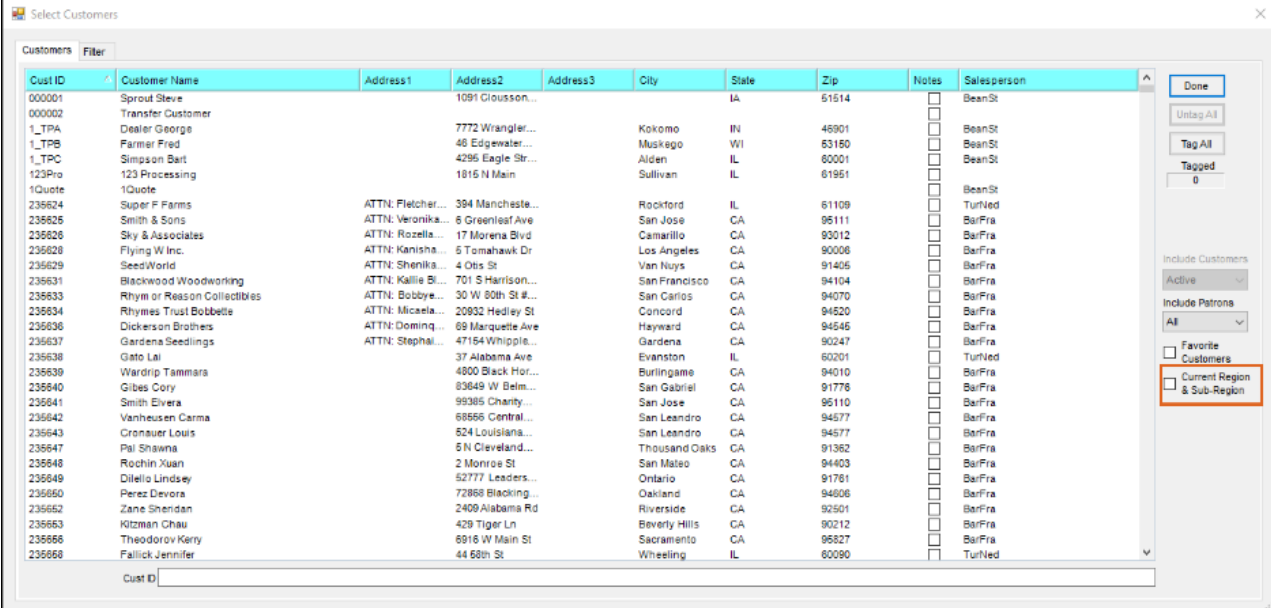
The *Customer Selection* screen is used throughout Agvance to select Customer(s) for a variety of functions (Invoices, Delivery Tickets, Purchases, Blend Tickets, Plans, Sales Orders, running reports, etc.). The Recent Customers by Regions tool creates an additional *Customer Selection* view that includes only Customers who have had Invoices within the specified number of months, allowing for the selection of these recent Customers by the same Region and Sub Region as the Location currently logged into.

Set up this new view at *Hub / Setup / Recent Customer by Regions*. Use the drop-down box to select how many months of Invoice activity to include to determine which Customers to display.



If **Delete Recent List** is selected, the view will be deleted from the database and the *Customer Select* screen will no longer display this option or search for Customers and activity by Region or Sub Region.

Once the setup is established, check the *Current Region & Sub-Region* box to display only the Customers who have an Invoice within the months chosen during setup.



Once selected, the *Customer Selection* screen will filter to only display Customers who have had an Invoice within the specified months.

Select Customers

Cust ID	Customer Name	Address1	Address2	Address3	City	State	Zip	Notes	Salesperson
1_TPB	Farmer Fred		48 Edgewater...		Muskego	WI	53150	<input type="checkbox"/>	BeanSt
1_TPC	Simpson Bart		4296 Eagle Str...		Alden	IL	60001	<input type="checkbox"/>	BeanSt
235625	Smith & Sons	ATTN: Veronika...	6 Greenleaf Ave		San Jose	CA	95111	<input type="checkbox"/>	BarFra
235641	Smith Elvera		99365 Charity...		San Jose	CA	95110	<input type="checkbox"/>	BarFra
235649	Dilello Lindsey		62777 Leaders...		Ontario	CA	91761	<input type="checkbox"/>	BarFra
235652	Zane Sheridan		2409 Alabama Rd		Riverside	CA	92501	<input type="checkbox"/>	BarFra
235658	Fallick Jennifer		44 58th St		Wheeling	IL	60090	<input type="checkbox"/>	TurNed
235714	Beech Louis		598 43rd St		Beverly Hills	CA	90210	<input type="checkbox"/>	BarFra
235653	Watt Karly		8070 W 17th St		Gary	IN	46402	<input type="checkbox"/>	
BelJul	Belle Juliamn		13 Oak Path Dr.		Beardstown	IL	62616	<input type="checkbox"/>	
Cashs	Cash Sale							<input type="checkbox"/>	BeanSt
GraJum	Graham Jummie		29 Orchard Lane		Pittsfield	IL	62363	<input type="checkbox"/>	

Cust ID:

Tagged: 0
 Include Customers: Active
 Include Patrons: All
 Favorite Customers
 Current Region & Sub-Region

Note: If an Invoice is voided or reversed, and no other valid Invoices exist for a Customer in the Locations that are within the Region or Sub Region, the Customer will not display in the *Customer Selection* screen.