

Contact Transaction History

Transaction Details by Contact

Contact Transaction History

Artsystems software makes it easy to track transactions with a specific contact and run a report on transaction details. This can be very helpful in preparation for a sales call or simply for checking status. For a quick report on a select contact follow these easy steps.

Note: Although this example is for client offers, the same steps can be used to find other transaction type details such as Shipments to a specified contact or contacts.

Go to **Transactions** module.
Click the **View Set** button on the Tool bar.

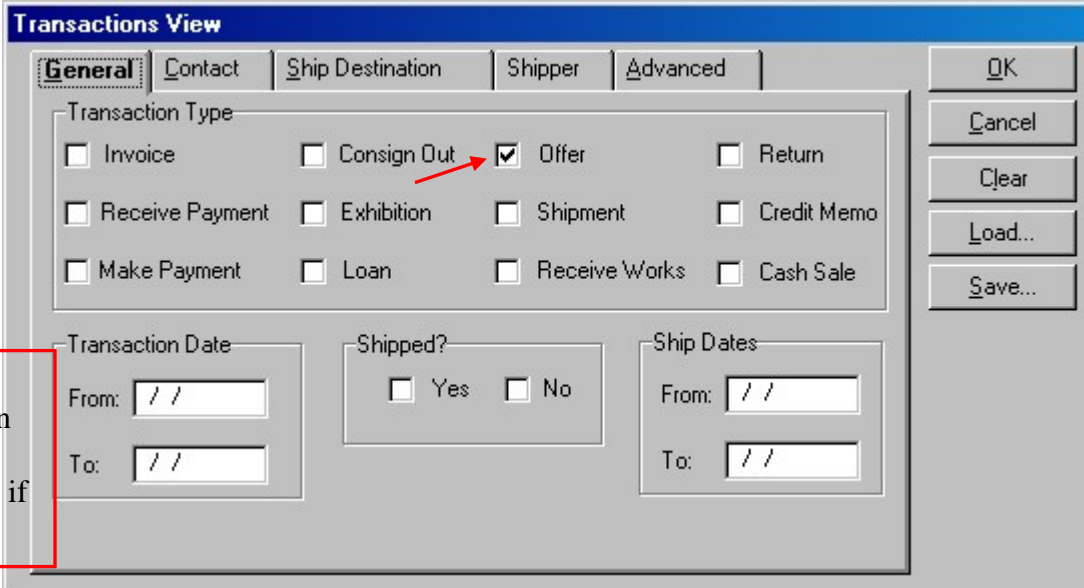
The screenshot shows the Artsystems GalleryPro software interface. The title bar reads "Artsystems GalleryPro - C:\Program Files\Artsystems GalleryPro\Copy of Sample.asd". The menu bar includes "File", "Edit", "Record", "View", "Tools", "Report", and "Help". The toolbar contains various icons, with the "Set" icon (a magnifying glass) circled in red. The main window is titled "Transactions" and displays an offer for "Mr. Harold Beame" at "200 East Bessemer Drive, Greensboro, NC 27401, USA". The offer number is "OF0001". Below the offer details is a table of works:

Inventory #	Artist	Title	Retail	%	Discount	Sales Price
MAT-002	Matisse, Henri, 1869-19	La Table Noire, 1919	300,000.00	20	60000	240,000.00
MAT-003	Matisse, Henri, 1869-19	La Fenetre Ouverte, 1916	150,000.00	10	15000	135,000.00
MAT-004	Matisse, Henri, 1869-19	Standing Nude, 1906	70,000.00	0	0	70,000.00
Work Discount:			520,000.00		75,000.00	445,000.00

At the bottom right, the summary shows: Total Misc. .00, SubTotal: 445,000.00, and Total: 445,000.00. The "Prepared" date is 01/09/1999 by CJ, and the "Authorized" date is / /.

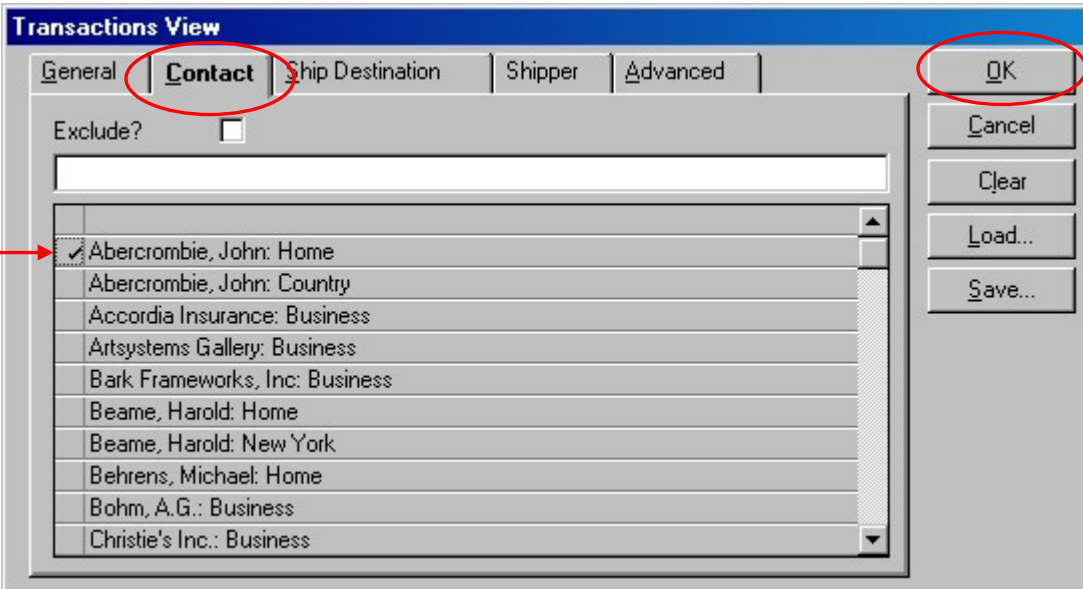
A **Transactions View** window will open.
Check the **Offer** checkbox.

Note: A select time period can be restricted by entering a date in the **From** and **To** fields of the **Transaction Date** group box.



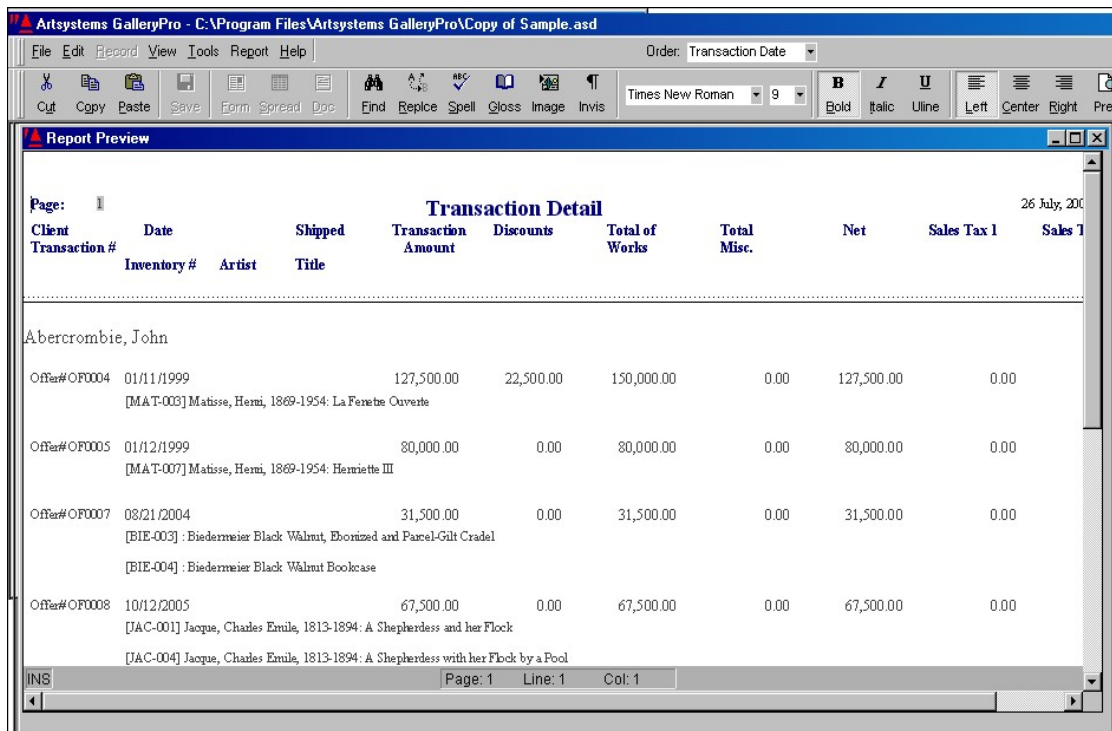
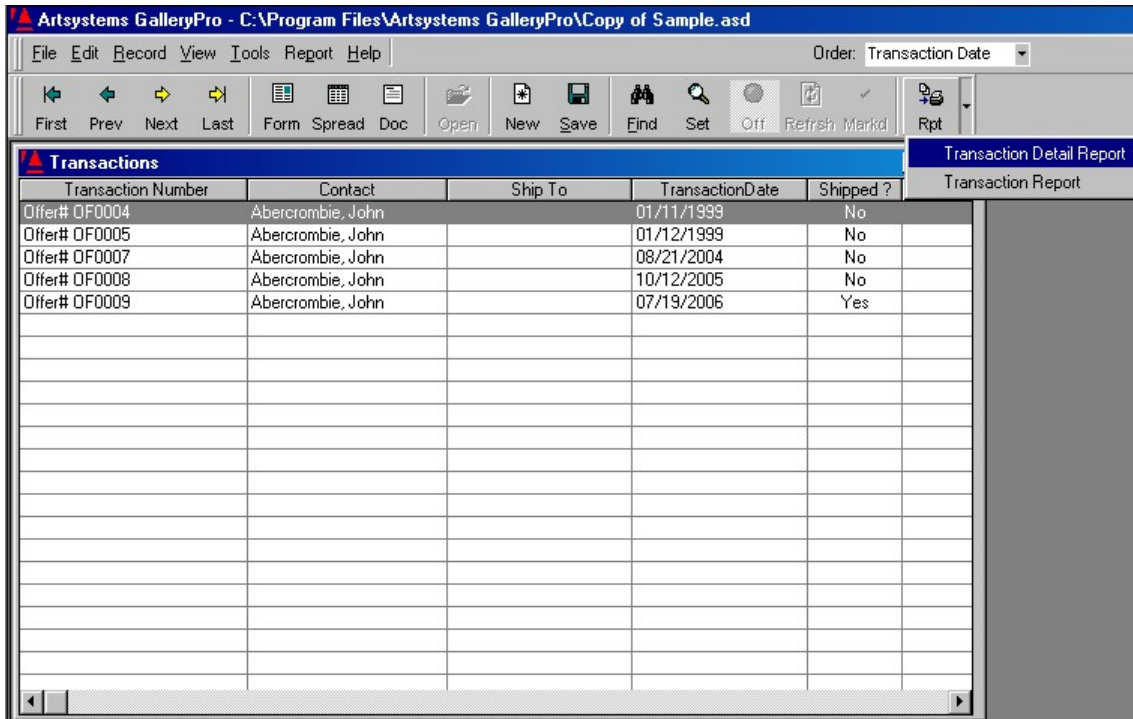
The screenshot shows the **Transactions View** window with the **General** tab selected. The **Transaction Type** group box contains several checkboxes, with **Offer** checked. A red arrow points to the **Offer** checkbox. The **Transaction Date** group box has **From:** and **To:** fields, both containing **//**. A red box highlights these fields with the text: "Enter Transaction Date parameters if needed." The **Shipped?** group box has **Yes** and **No** checkboxes, both unchecked. The **Ship Dates** group box has **From:** and **To:** fields, both containing **//**. On the right side, there are buttons for **OK**, **Cancel**, **Clear**, **Load...**, and **Save...**.

Next, select the specific contact or contacts for which offer detail is needed, by clicking the **Contact** tab and marking the contact selection. Click **OK**.



The screenshot shows the **Transactions View** window with the **Contact** tab selected. The **Exclude?** checkbox is unchecked. Below it is a search field. A list of contacts is displayed, with the first item, **Abercrombie, John: Home**, selected. A red arrow points to this selected item. The **OK** button is circled in red. On the right side, there are buttons for **Cancel**, **Clear**, **Load...**, and **Save...**.

Switch to Spreadsheet view to see all transactions in the View set.
Go to the **Rpt** (reports) Tool Bar button and select the **Transaction Detail Report**.



If further assistance is needed, please contact [Artsystems Support](#).
Artsystems Support 212-620-5500 x 2