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**get started with Gestix**

## The Customer File

Gestix enables outstanding Customer management. It is a powerful database tailored to your business.

With every Gestix Customer entry, a new database space is created. Here you can record exhaustive information about the Customer, as well as follow up on completed tasks, or plan new ones (depending on the Gestix version). You can also categorise the Customer in a way which will later allow you to access specific Customer files and reports according to the criteria defined by you.

### How to create Customer files, record information, and categorise Customers

#### - Main information

Every Customer file has a series of fields displayed at the top of the page where you can insert the most relevant information about the Customer:

The screenshot shows a form with the following fields and values:

- Customer ID: 34
- Name: my first customer
- Class: International
- Keyword: whatever i need
- Sales Rep: my sales person
- Geographical Area: Taiwan

Arrows indicate the flow of information from the Name field to the Class field, and from the Keyword field to the Geographical Area field.

Customer ID – Whenever a number, or code, has been allocated to a Customer, the Customer ID is the field where it can be recorded. If this field is left blank, the system will fill it in automatically with the next consecutive number of a new

## get started with Gestix

Customer file.

**NAME** – There are two fields allocated to recording the name of the Customer. This should provide sufficient space for longer names. Alternatively, the second field can be used for information that can act later on as a memory trigger, helping to identify the Customer faster in listings.

**CLASS** – This section allows you to define the criteria for categorising Customers. Once defined, it makes it easier to organise Customers into groups that share a common denominator.

Each Customer can belong to one class only, such as: Newsletter or No Newsletter, National or International Customer.

**KEYWORD** – This is another field that helps with Customer selection. Here you can record information such as: the product they usually buy, the last and with who was the last contact, etc.

This field enables you to follow Customers according to: the product they bought, to who was the last person they contacted, when they were last contacted, etc.

**LOCATION** – This is another search option. This field can be used freely, or it can display set location areas to appear in the search box, in order to avoid entry duplication. See further down how to define default location areas.

### **Contact information - Company and related contacts**

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The Customer file includes a section where additional information about the Customer can be recorded:

**CONTACTS**

Phone: 999999999      Mobile: \_\_\_\_\_  
Phone 2: 999999999      Email: john.doe@example.com  
Fax: \_\_\_\_\_      Web Page: www.example.com

Name: john doe      Phone: \_\_\_\_\_  
Mobile: 999999999      Position: Manager  
Email: john.doe@personalmail.com      Birth Date: \_\_\_\_\_

Name: john does assistant      Phone: \_\_\_\_\_  
Mobile: 99999999901      Position: Operational  
Email: \_\_\_\_\_      Birth Date: \_\_\_\_\_

**CONTACTS** - Here you will find space for main contact information, as well as additional personal contacts for each Customer.

As a rule, company information should be filled in at the top, followed by the contact details of

the people related to the company in the fields below.

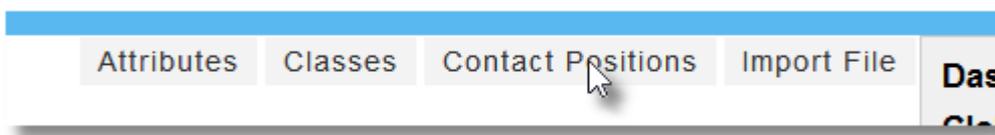
In the personal details section you can select the position the contact has within the company (the Positions list can also be defined by you).

The "Date of Birth" field can be used to record the date of birth of the Customer, if this is important to your business, or it can be used to record the date when the contact with the respective Customer was initiated, etc.

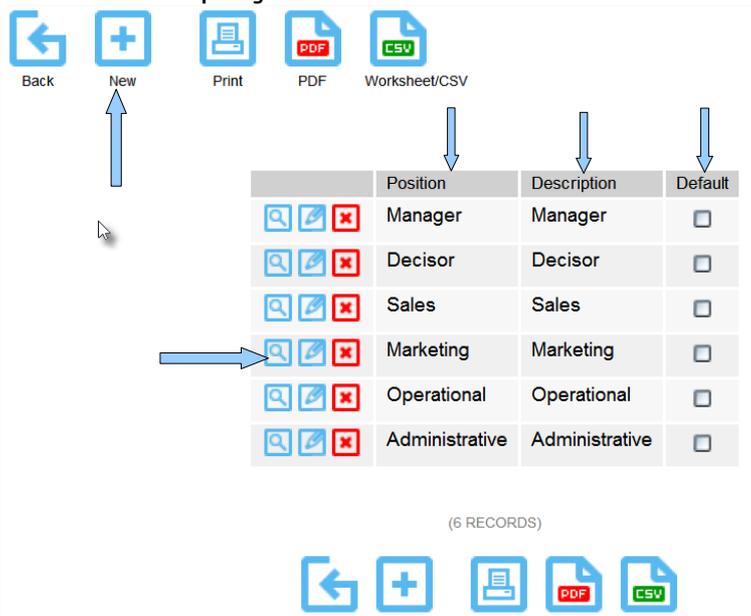
You can insert as many personal contacts as necessary within a Customer file. Every new file has three fields allocated to personal contacts. If more are needed, save the file and exit. When re-opening the file, three new fields will appear. Consequently, whenever a Customer file is edited, there will be three blank personal contact fields in addition to the ones that have already been filled in. This way, all relevant contacts can be recorded in one Customer file, and can be selected in the search field making it easier to keep in touch with all the contacts you have in one particular company, or business.

### Contact positions

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The main Customer screen allows you to define the position of each contact within a company:

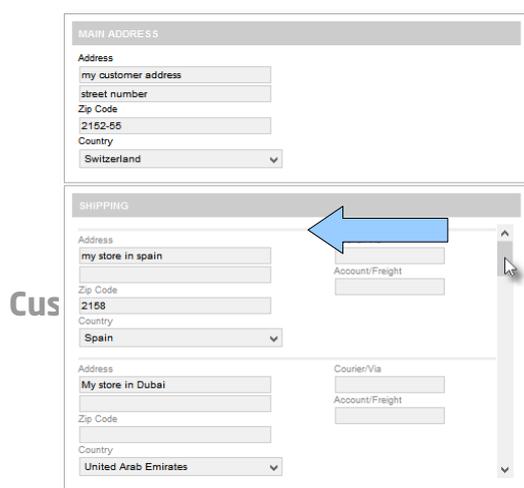


The section where a new Contact Position can be created is accessed by selecting the Contact Positions option. A new contact Position is created using the + (plus sign). In this section you can also view, edit, or delete an existing Contact position by clicking on the respective icons next to each Contact Position.

“Position” refers to the description that is available for selection next to the contact name in listings .

“Description” is a field allocated for additional information (if the title of Contact Position is self-explanatory, it can be repeated in the Description field).

If a Position is selected as Default, it will be automatically given to any new contact added.



### - Address/es

In the Address section of the Customer File each Customer can

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have a main address and a secondary one ( Headquarters and Branch, for instance).

← The more advanced versions of Gestix allow for an indefinite number of addresses, same as Personal Contacts. They are created the same way, also.

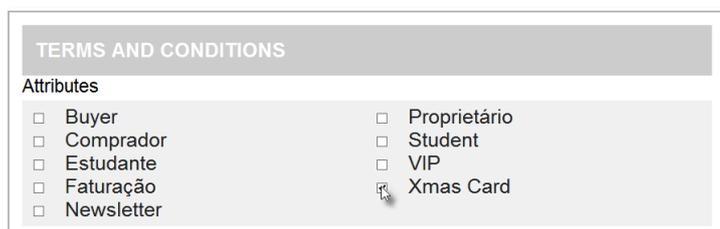
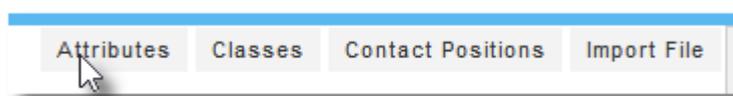


In addition to the information fields of the Customer File, there is also a Notes field making it even easier to record any other relevant Customer information.

The Customer file allows for recording of specific business information for each Customer. This varies according to Gestix versions and modules and can consists of, for instance, the currency used by Customer, allocated price lists, payment conditions, debit, credit, etc.

This section is not included in this manual, which deals mainly with contacts and follow-up tasks.

### - Attributes



Attributes are a powerful way of selecting Customers according to fixed criteria.

Unlike Classes (each Customer can only belong to one Class), each Customer can have as many Attributes as needed in order to enable better categorising.

## **Categorising Customers**

Creating a Customer file allows you not only to record important Customer information, but also to categorise the Customer according to specific criteria. This allows for better Customer management.

Consequently, it is important to decide first how you wish to group Customers, and what information is relevant. Better categorising allows for better Customer management.

### **How to create Classes and Attributes, how to organise Locations, and how to list Customers**

The most important fields for Customer classification are: Class, Attributes, Keywords, and Location.

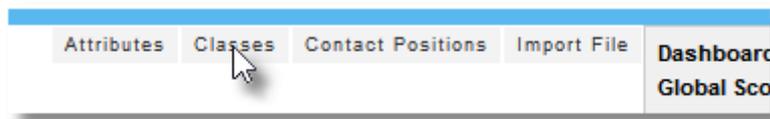
CLASS - Allows for selecting large groups of Customers that have a common denominator. For example: Internacional Customers, Deactivated Customers, Partners, End User, etc.

ATTRIBUTES - Attributes are used to categorise Customers according to fixed criteria. They provide quick and easy access to information available in the Customer file and also allow for a more detailed search.

As an example, by creating a "New Product" Attribute and another for "No e-mail", it is then possible to select all Customers interested in knowing about new products, but they need to be contacted by phone.

Classes and Attributes are created by selecting the options available at the top of the Customer main screen.

## Classes - How to create a new class

A form titled 'Class' with the following fields: 'Class ID' (text input with 'INTL'), 'Description' (text input with 'International'), 'Comments' (text area with 'All my customers that are located in determined country or location'), 'Sales Taxes' (dropdown menu with 'Do not apply'), and 'Default' (checkbox). At the bottom are a red back arrow, a green save icon, and a 'Save' button.

Fill in the Description field with the name you wish to give the new Class. Explanatory notes can be inserted. By checking the "Default" box, every time a new Customer file is created it will automatically belong to this class.

## How to create Attributes

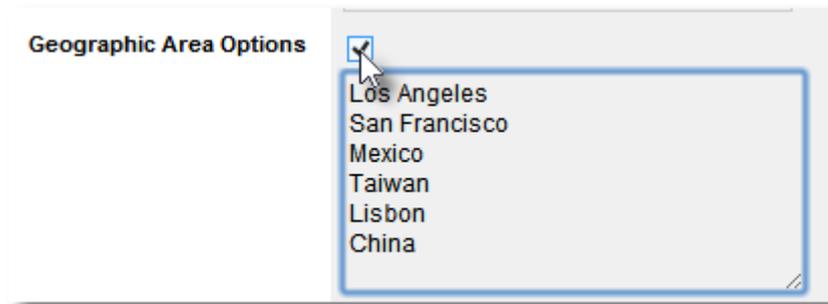
A form titled 'Attribute' with the following fields: 'Attribute Name' (text input with 'Buyer'), 'Checked by Default' (checkbox), and 'Enable Report Criteria' (checkbox with a checkmark). At the bottom are a red back arrow, a green save icon, and a 'Save' button.

The process of creating Attributes is very similar to creating a new Class. Attributes are merely descriptive and are accessible whenever the Customer file is opened. They are also a means of listing Customers.

In order to list Customers by a specific Attribute, the box "Listing criterion" must be checked.

## Location

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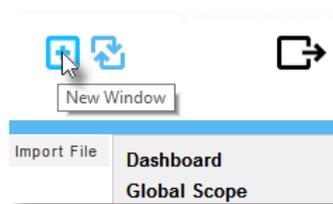
Location is a free field. In order to create default options for Location, go to

Admin/Settings, select "Location options" and fill in the box fields.

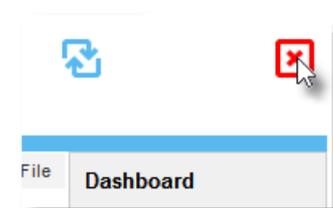
By creating fixed options for Location, entry duplication is avoided. For instance: "Henley-on-Thames" and "Henley on Thames" are considered as two different entries by the system, even though they refer to the same location.

## Work optimisation

Ideally, the first thing to do, even before creating Customer files, is to establish criteria for categorising Customers.



However, it may happen that a new Class, or a new Location, etc. is needed when creating a new Customer file.



When this situation occurs, it is not necessary to discard the work in progress. Save it, open a new Gestix window by clicking on the icon in the top right hand side, make the necessary changes, then close the window and continue.

The option of opening a new window in order to make changes, consult records, etc, without abandoning the work in progress, is valid for all Gestix.

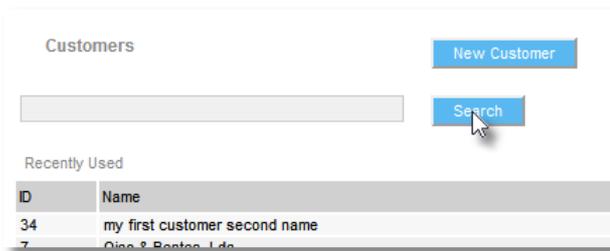
## get started with Gestix

### Selecting and listing Customers

Gestix allows you to access quickly and efficiently not only individual Customers, but also groups of Customers for mailings and newsletters.

The main screen of the Customers menu displays various options of selecting and managing contacts.

### Selecting Customers



The text box and the Search button are the most obvious way to select contacts.

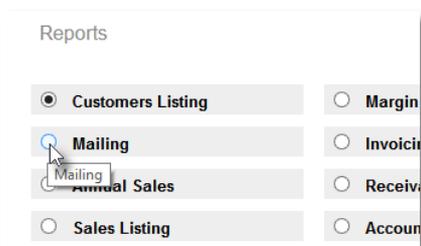
By using the text box you can search for a particular Customer by name, company name, fiscal number, e-mail,

phone, etc.

Gestix will then list all the Customer files that contain the information inserted in the text box. All you have to do is click on the Customer you are looking for in order to access the Customer File.

For easy access, the most recently used Customer Files will be displayed below the text box.

### Listing groups of Customers



Customer Listing and Mailing are the two recommended options for listing groups of Customers to be contacted. These are displayed in the Customers main screen. You can then select additional criteria according

to which you want to group Customers.

## get started with Gestix

This can be one criterion, such as location, (for instance: all Customers based in London). It can also be a combination of criteria: all London based Customers that share the Attribute "Hot".

Conditions	Yes	No	Ignore
Buyer	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Hot	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Newsletter	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Owner	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Partner	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Student	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
VIP	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Xmas Card	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Match all conditions

All the Attributes available as listing criteria are displayed as Conditions. Here you can select the Attributes to be considered, the ones to be excluded, and the ones to be ignored in any listing.

By ticking the box named "Satisfy all conditions" the listing process will follow

exactly all the conditions selected.

For example, in the picture above, the listing result will be of Customers who are "Hot" and are not categorised as "Partners".

## Customer Tasks

Gestix editions that include a CRM module are better suited for Customer follow-up.

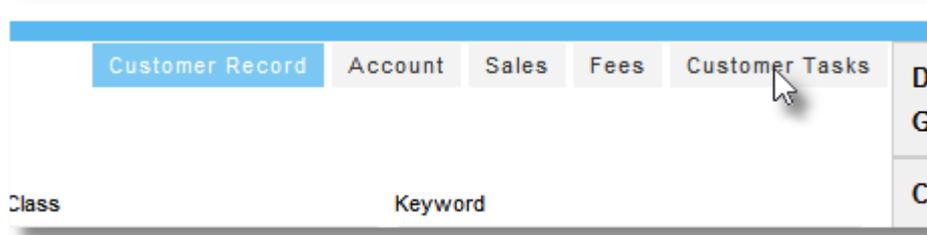
In these editions there is a "Customer Task" section allocated to each individual Customer File. This enables efficient management of the development of the business relationship with any particular Customer.

Gestix can also remind you of what needs to be done.

## How to record and plan the Customer relationship. How to create tasks and set up reminders

The tasks page is accessed by clicking on the "Customer Tasks" button located at the top of the Customer File.

## get started with Gestix



## How to create tasks

A screenshot of the 'Task' creation form in Gestix. The form is titled 'Task' and contains several fields. Blue arrows point to the following fields: 'Task Date' (2013-12-05), 'Task Type' (Negotiation), 'Description' (Meeting to end negotiation), 'Task Completed' (checkbox), 'Status' (dropdown), and 'Next Contact' (date field). The 'Notes' section contains the text: 'People that will be present: Mr Jonh Smith, Dr Hunter. Not to forget: .....'. The 'Record Date' is 2013-12-05, 'Priority' is Normal, and 'Dead Line' is empty.

When creating a new task, the main fields to be filled in are:

**Task Date** - This is the task completion date. This field is important when searching for tasks scheduled for a certain time period. The field will display by default the date when the task was created.

**Task Type** - It allows you to choose from a list previously created, what kind of task it is. The first item of the list is displayed by default.

**Description** - A short description of the task, or the task title. This field is obligatory.

A screenshot of the 'Task' creation form in Gestix, showing a different example. Blue arrows point to the following fields: 'Record Date' (2013-12-05), 'Task Date' (2013-12-05), 'Dead Line' (2013-12-06), 'Priority' (High), 'Task Type' (Negotiation), 'Description' (Meeting and negotiation), 'Status' (2013-12-16), 'Status' (Product will be supplied), and 'Notes' (People that will be present: Mr Jonh Smith, Dr Hunter. Not to forget: .....). The 'Task Completed' checkbox is unchecked, and 'Next Contact' is 2013-12-12.

**Notes** - Here you can enter a more detailed description of the task.

Other fields of the task creation section are:

**Date of entry** - This is a descriptive field and it displays the date when the task was

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created.

Deadline - Displays the task deadline.

Priority - Prioritises the tasks by changing the display colour in the Task Manager.

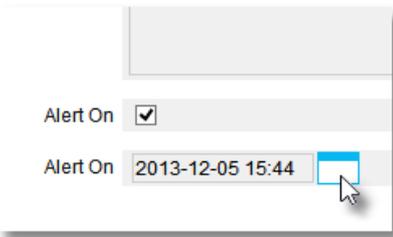
Status - Shows the status of the task, whether or not a completion date was set.

Next contact - It allows for scheduling the date of the next contact with the Customer.

### Reminders/alerts

When creating a new task you can also specify if, and when, you wish to be reminded of the task.

### How to set up task reminders



Whenever creating a new task or editing an existing one, click in the box called "Reminder" and then select a date when you wish to be reminded of the task.

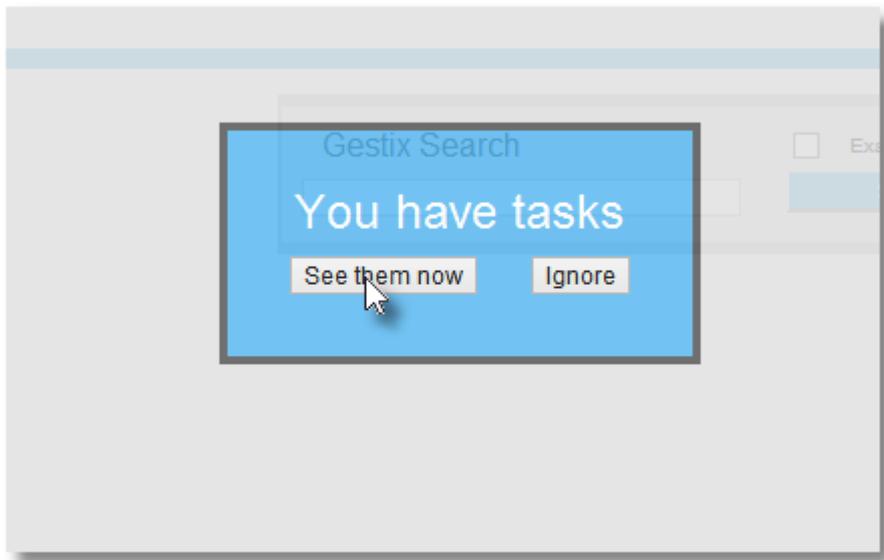
### How to view reminders

Whenever you access Gestix, you will be prompted if there are any tasks to be done, as long as reminders were previously set.

You can choose to view the most urgent tasks, or you can ignore the prompt. If you choose to ignore the prompt, you can always see the tasks due on the day in the Agenda or in the Task Manager section.

## get started with Gestix

If you click on the "Go to tasks" button, the Task Manager will open. Here you can view all tasks with a reminder on the day, as well as previous tasks with reminders that have not yet been completed.



## Managing company tasks

**How to follow-up and manage completed, current, and future tasks**

**Agenda: the task calendar - How to have a quick overview of the tasks to be done in a specific time period.**

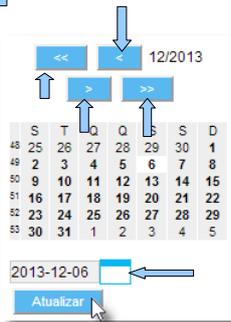
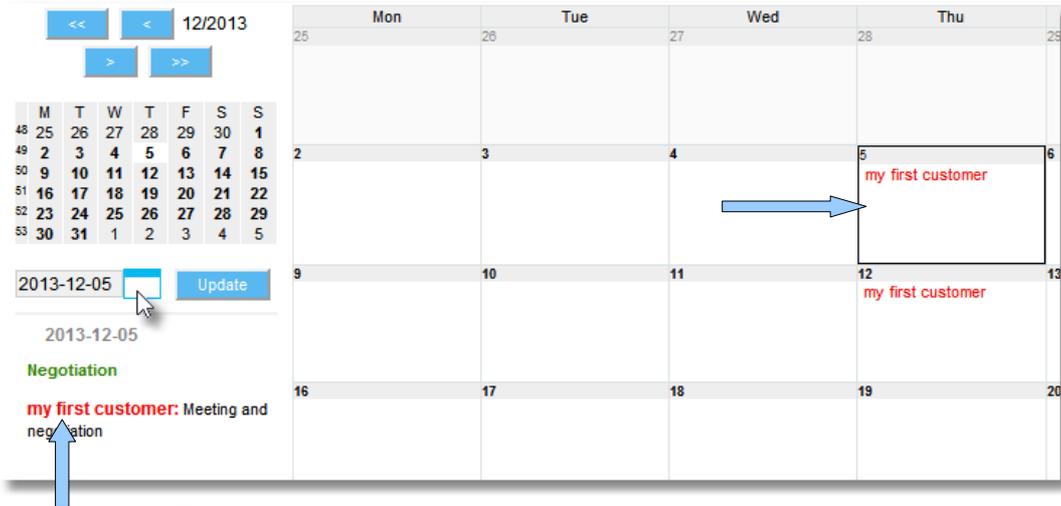
Whenever you access the Agenda, the current day is highlighted and, if you have any tasks scheduled for the day, these will be displayed here (by Task Type).

A summary of the daily tasks is displayed on the left of the screen

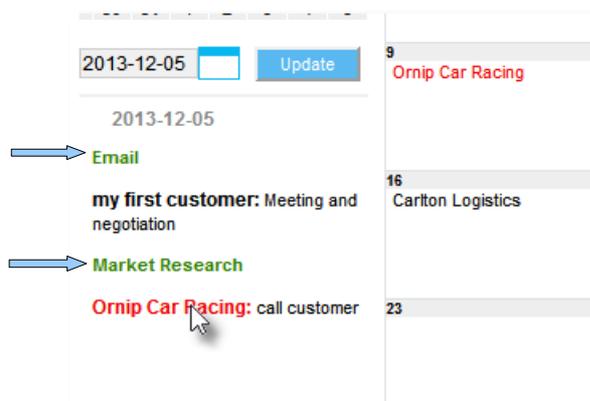
## get started with Gestix

underneath the highlighted today's date (Task Type, Customer Name, Task Description).

You can see the tasks scheduled for any day of the calendar by clicking on that particular day in the agenda.



You can also search for a particular date in the Agenda by using the search field. Alternatively you can move back and forth by a month, or by a year, by using the arrow buttons.



If more than one task of the same type are scheduled on the same day, these will be grouped by Task Type and the number of tasks will be displayed next to the Task Type in the Agenda.

For example, the picture to the left shows a day in the Agenda when two "E-mail" and one "Market Study" have been scheduled.

In this example, the "market Study" task has been highlighted in red as Top Priority.

The box on the right displays a summary of tasks grouped by "Task Type".

## How to view and edit tasks in the Agenda

In the Agenda, you can go directly to a task by clicking on it.

Task 3

Task Date 2013-12-05 Dead Line 2013-12-06 Priority High

Customer my first customer - 34

Task Type Negotiation

Description Meeting and negotiation

Status 2013-12-16 Product will be supplied

Next Contact 2013-12-12

Task Completed

Notes People that will be present:  
Mr Jonh Smith  
Dr Hunter  
Not to forget:

Alert On  2013-12-05 15:44:00

In the window that opens as a result all the fields displayed can be edited. Here you can view, change, or delete the selected task.

You can also access the Customer File that the task belongs to by clicking on the magnifying glass icon displayed next to the Customer's name.

By clicking on the red arrow, you can go

back to the previous screen without saving any changes.

## Task Manager

The Task Manager makes it easier to organise the tasks for all the Customers belonging to the same company.

Whenever you access the Task Manager there will be a list of tasks displayed. These tasks can be organised by using the fields displayed at the top of the page.

## get started with Gestix

The screenshot shows the 'Task Manager' interface. It includes a 'Task Type' dropdown menu set to 'All', a 'Task Date Between' range from '2000-09-09' to '2013-12-05', a 'Task Completed' dropdown set to 'All', and a 'Customer' text input field. On the right side, there are icons for 'Print' and 'PDF', and buttons for 'Search' and 'New Task'. A mouse cursor is hovering over the 'Search' button.

Here you can choose the type of task you wish to view; you can also view completed tasks, tasks that are due, tasks scheduled within a specific time period, and tasks by Customer.

Once the desired options are selected, click on "Search" to refresh the list of tasks displayed.

In the Multi-User Gestix editions you can view the tasks created by each user (if you have permission for it).

## How to create a new task

The screenshot shows the 'Task (New)' form. It includes fields for 'Task Date' (2013-12-05), 'Dead Line', 'Priority' (Normal), 'Customer' (with a dropdown arrow), 'Task Type' (Appointment), 'Description', 'Status', 'Next Contact', 'Task Completed' (checkbox), 'Notes' (text area), and 'Alert On' (checkbox) with a time field set to 00:00:00.

In order to create a new task in the Task Manager, click on the "Create Task" button to open a new screen.

Creating a new task in the Task Manager is similar to creating a new task in Customer Tasks, the only difference is that in the Task Manager you need to specify the Customer to which the task refers to.

## - Task Listings

Task Date	Customer	Task Type / Description	Status
2013-12-05	Ompip Car Racing	Identify Requirements call customer identify witch product fits for the Corporation	
2013-12-05	my first customer	Negotiation <b>Meeting and negotiation</b> People that will be present: Mr Jonh Smith Dr Hunter Not to forget: .....	Product will be supplied 2013-12-16 <b>Next Contact: 2013-12-12</b>
2013-09-03	Ompip Car Racing	Appointment <b>whatever i want</b>	🟢 2013-09-03

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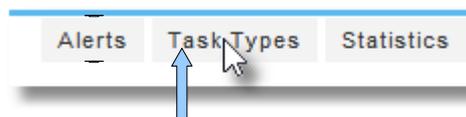
The tasks are listed according to the criteria inserted in the fields. This is another way of accessing individual tasks.

This type of listing enables a quick overview of the status of each task.

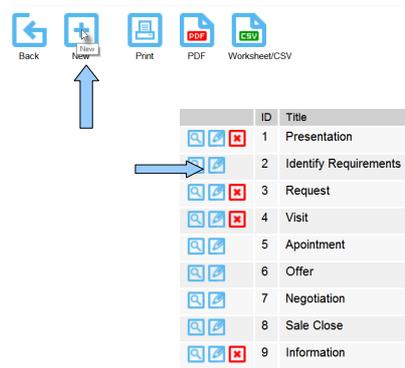
You can then open any task by clicking on it.

### How to define Task Types

This is a process very similar to creating Contact Positions.



You can view a list of all existing Task Types, or create a new one, by clicking on the Task Type button.



### How to view Reminders



In the Task Manager you can view reminders set for the day (or previous days, if the respective tasks have not yet been completed).

In order to do this, click on the Alerts button in the top right hand corner of the screen.

**get started with Gestix**

## Customer List, Report

## Reports

Reports allows you to obtain reports/list of your customers by multiple criteria. Select the criteria and click the **Go(22)** button.

Reports

Customers Listing (1)     Margin Listing (3)  
 Mailing (2)     Invoicing (4)  
 Annual Sales (7)     Receivable (9)  
 Sales Listing (6)     Accounts (8)  
 Annual Margin (5)

Report: Customers Listing (22)

Labels: No (10)

**Report Criteria**

IDs: \_\_\_\_\_ (11)    Names: \_\_\_\_\_ (12)  
 Keyword: \_\_\_\_\_ (13)    Class: All (14)

**Geographic Area** (15): All  
**Sales Rep** (16): All  
**Documents** (17): Between \_\_\_\_\_ and \_\_\_\_\_  
 By Due Date (18)

Conditions	Yes	No	Ignore
Buyer	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Comprador	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Estudante	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Faturação	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Newsletter	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Proprietário	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Student	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
VIP	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Xmas Card	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Match all conditions (19)

Currency (21): GBP In Thousands

Lines per page: 100 (20)

- 1 All customers for list
- 2 Mailing
- 3 Margin List
- 4 Include Invoicing
- 5 Annual margin
- 6 Sales listing
- 7 Annual Sales
- 8 Accounts
- 9 Receivable
- 10 List format by number of
- 11 ID by customer
- 12 Containing Word

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labels.

- 13 To obtain list by specific Name
- 14 To obtain list by class
- 15 To obtain list by Geographic Area
- 16 Sales Representation
- 17 Between date selection
- 18 Due to date
- 19 Document Condition
- 20 Match all conditions or not
- 21 To obtain list in thousands

Next them to a worksheet/CVS, PDF or Print directly to a printer.

**Gestix** Software Your business. Your way. Customers - Customers Listing + ↻

Demo

Back Previous Next Print PDF Worksheet/CSV Export Import to CSV

Records 1 to 24 of 24

ID	Name	Phone	Fax	Email	Sales Rep
2	Transportes Almirante	351871051528		fabiosalvador@hotmail.com	Tania Saragoza
4	Vasco da Gama Global Logistics Ltd.	351124087764		pedrosantos@hotmail.com	Tania Saragoza
6	Pituxa Real Estate	351011066143		ritasalvador@hotmail.com	Ross Fonseca
7	Qiao & Bentes, Lda	351917067917		anasalvador@hotmail.com	Joel Martins
8	Sachs & Bros Designers	351954068139		samuelfernandes@hotmail.com	Eliseu Saragoza
9	Singer Five Group	351568095746		rossnichols@hotmail.com	Eliseu Saragoza
10	Dr. Levi Strong	351465048522		isaquesalvador@hotmail.com	Joel Carvalho
16	Archeo-Cascais Montalegre	351396067269		miguelferreira@hotmail.com	Joel Martins
18	Ziemens Iberia Portugal	351769060379		carlafernandes@hotmail.com	Ross Fonseca
19	Metalmecom SA	351754001961		manuelfonseca@hotmail.com	Joel Martins
20	Imporama Import-Export	351958049908		carlotalopes@hotmail.com	Joel Martins
21	Consumidor Final	351368051746		angelasaragoza@hotmail.com	Manuel Fernandes
22	Joel Salvador	224038155			
23	Carla Fernandes	261240109			
24	Rita Oliveira	856943848			
25	Maxwel Santos	308727455			
26	Samuel Nichols	172846400			
27	Philip Duarte	924942232			
28	Carla Oliveira	306223609			
29	Isaque Saragoza	605873603			
30	Pedro Santos	134367027			
31	Daniel Salvador	370693968			
32	Miguel Almeida	177826095			
33	Sara Oliveira	924050447			

Back Previous Next Print PDF Worksheet/CSV Export Import to CSV

- 1 Print Button
- 2 To export to PDF
- 3 To export to worksheet button
- 4 To IMPORT to CSV button
- 5 Report result every row is clickable for details

## Sales Filter: define which logistical documents count as sales

Normally, Gestix considers all sales documents as sales. To select which

## get started with Gestix

documents are considered as sales and which document are not, on the Customers menu tap the Sales Filter button.

Tap the Sales Filter button to open the selection window

Customers Listing

Pending Invoices

Mailing

Annual Sales

Sales Listing

Annual Margin

Margin Listing

Invoicing

Pending Delivery

Pending Credit

Pending Orders

Consignments

Receivable

Receivable Age

Payment Request

Accounts

Task Manager

Contact Customers

Leads

Customers

Orders

Projects

Contracts/Fees

Salespersons

Invoicing

Webshop Invoicing

Point of Sale...

Articles

Families

Production

Serial Numbers

Batch Numbers

Multiple Warehouses

Services

Other Items

Suppliers

Purchase Orders

Purchasing

Currencies

System Audit/SAFT

Admin

Report **Sales Listing**

Summary

**Report Criteria**  Order by ID

IDs  Names

Keyword  Class **All**

Geographic Area

All

Sales Rep

All

Documents

**Sales Filter**

Between

and

By Due Date

Conditions	Yes	No	Ignore
Cerâmica	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Cordoaria	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Gráfica	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Moldes	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Proprietário	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
VIP	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Xmas Card	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Match all conditions

You are then able to specify which documents to consider by selecting/deselecting their series on this screen.

## get started with Gestix

The screenshot displays the Gestix Enterprise 2014 6.1.3.3 Customers interface. The main window shows a 'Customers' list on the left and a 'Reports' section on the right. A 'Document Search' dialog box is open in the foreground, titled 'Documents to be treated as Sales'. The dialog contains a list of document types with checkboxes for selection:

- FAT Fatura
- MB Fatura Refª MB
- FNS Fatura Série Nova
- FS Fatura Simplificada
- FR Fatura Recibo
- ENC Folha de Serviço
- GR Guia de Remessa
- NCD N. Crédito/Devolução
- NC Nota de Crédito
- ND Nota de Débito
- GD Nota de Devolução
- TEC Trabalhos em Curso

At the bottom of the dialog, there is a 'Use recommended settings' button and a 'Save' button. The background interface shows a 'Recently Used' list of customers and a 'Report Criteria' section for 'Sales Listing'.

(Leave all blank to let Gestix automatically select the pertaining documents)

Either place a check mark in every document to be considered or leave all unchecked for enabling Gestix to select automatically all the sales documents.

The same principle applies to suppliers/vendors accounts in Gestix, concerning purchase documents instead of sales documents.