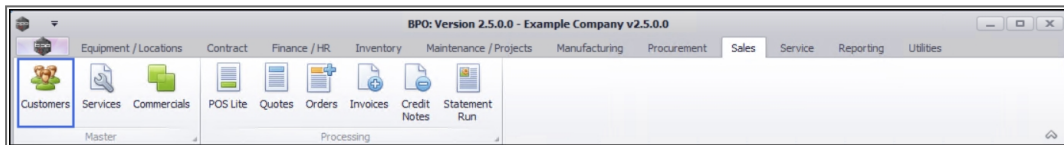


SALES

CUSTOMERS - HISTORY

The **History** tile can be found in both the Customer Listing and the Customer Maintain screen. This tile will direct you to a data grid of historical changes made to the Customer or Commercial Details when you [Customers - Add Customer](#) or [Customers - Edit Customer](#) frames for a specific customer.

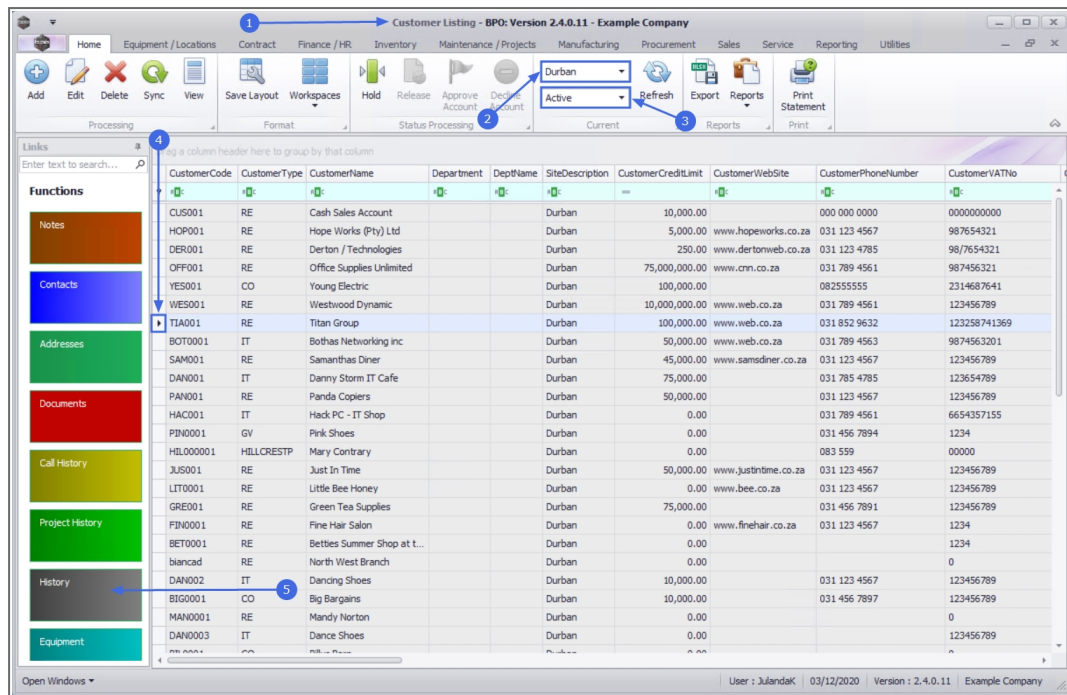
Ribbon Access: *Sales > Customers*



1. The **Customer Listing** screen will display.
2. Select the **Site** where the Customer can be located.
 - The example has **Durban** selected.
3. Select the **Status** for the customer whose history you wish to view.
 - The example has **Active** selected.
4. Click in the **row** of the customer for whom you wish to view the History.
5. Click on the **History** tile.



If the tile you are looking for is not visible in the list, hover over the Links panel until the up and down **arrows** appear. Use these arrows to navigate through the tile list or use the **track ball/wheel** on your mouse to scroll through the tile list.



CustomerCode	CustomerType	CustomerName	Department	DeptName	SiteDescription	CustomerCreditLimit	CustomerWebSite	CustomerPhoneNumber	CustomerVATNo
CUS001	RE	Cash Sales Account			Durban	10,000.00		000 000 0000	0000000000
HOP001	RE	Hope Works (Pty) Ltd			Durban	5,000.00	www.hopeworks.co.za	031 123 4567	987654321
DER001	RE	Derton / Technologies			Durban	250.00	www.dertonweb.co.za	031 123 4785	987654321
OFF001	RE	Office Supplies Unlimited			Durban	75,000,000.00	www.cnn.co.za	031 789 4561	987456321
YES001	CO	Young Electric			Durban	100,000.00		082555555	2314687641
WES001	RE	Westwood Dynamic			Durban	10,000,000.00	www.web.co.za	031 789 4561	123456789
TIA001	RE	Titan Group			Durban	100,000.00	www.web.co.za	031 852 9632	123258741369
BOT0001	IT	Bothas Networking Inc			Durban	50,000.00	www.web.co.za	031 789 4563	9874563201
SAM001	RE	Samanthas Diner			Durban	45,000.00	www.samsdiner.co.za	031 123 4567	123456789
DAN001	IT	Danny Storm IT Cafe			Durban	75,000.00		031 785 4785	123654789
PAN001	RE	Panda Copiers			Durban	50,000.00		031 123 4567	123456789
HAC001	IT	Hack PC - IT Shop			Durban	0.00		031 789 4561	6654357155
PIH0001	GV	Pink Shoes			Durban	0.00		031 456 7894	1234
HIL000001	HILLCRESTP	Mary Contrary			Durban	0.00		083 559	00000
JUS001	RE	Just In Time			Durban	50,000.00	www.justintime.co.za	031 123 4567	123456789
LIT0001	RE	Little Bee Honey			Durban	0.00	www.bee.co.za	031 123 4567	123456789
GRE001	RE	Green Tea Supplies			Durban	75,000.00		031 456 7891	123456789
FID0001	RE	Fine Hair Salon			Durban	0.00	www.finehair.co.za	031 123 4567	1234
BET0001	RE	Betties Summer Shop at t...			Durban	0.00			1234
biancad	RE	North West Branch			Durban	0.00			0
DAN002	IT	Dancing Shoes			Durban	10,000.00		031 123 4567	123456789
BIG0001	CO	Big Bargains			Durban	10,000.00		031 456 7897	123456789
MAN0001	RE	Mandy Norton			Durban	0.00			0
DAN0003	IT	Dance Shoes			Durban	0.00			123456789

- The **History Listing for Customer: [customer code]** screen will display.
- All historical changes made in the **Customer Details** or **Commercial** frames linked to the selected Customer will be listed, with the most recent information at the top of the data grid.



You will not be able to modify the information on this screen as the this feature provides the History listing for the customer only.

- The **scroll bars** at the bottom and the side of the data grid indicates that more information is available. Use the scroll bars to navigate to the right and further down the screen.

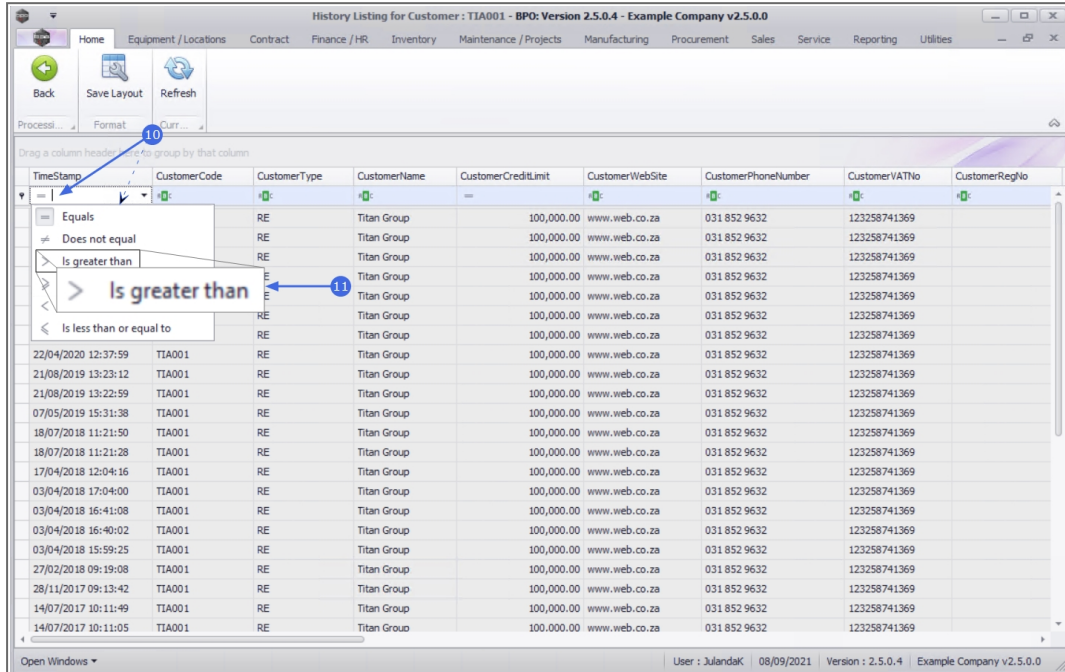
SEARCH FOR SPECIFIC HISTORY PERIOD

- If you wish to search for a specific period of history for a customer, then you can utilise the filter search row. [For a detailed handling of this topic refer to BPO2 Data Grid Filtering.](#) For this example, we will search for

all the historical information for 2020.

10. Click on the [=] in the Time Stamp column to display the **filter options menu**.

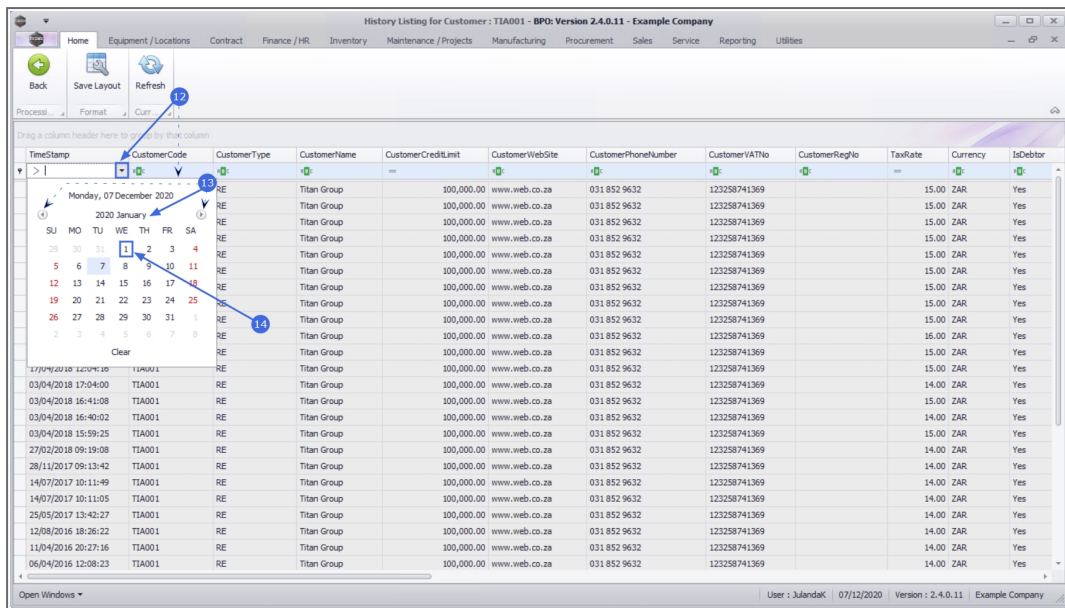
11. Select > - **Is greater than**.



12. Click on the down **arrow** in the **Time Stamp** column to display the **Calendar** function.

13. Scroll to January 2020.

14. Click on 1st January to update the filter search row with your search parameters.



TimeStamp	CustomerCode	CustomerType	CustomerName	CustomerCreditLimit	CustomerWebSite	CustomerPhoneNumber	CustomerVATNo	CustomerRegNo	TaxRate	Currency	IsDebtor
Monday, 07 December 2020	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369			15.00	ZAR	Yes
2020 January	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369			15.00	ZAR	Yes
SU MO TU WE TH FR SA	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369			15.00	ZAR	Yes
29 30 31 1 2 3 4	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369			15.00	ZAR	Yes
5 6 7 8 9 10 11	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369			15.00	ZAR	Yes
12 13 14 15 16 17 18	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369			15.00	ZAR	Yes
19 20 21 22 23 24 25	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369			15.00	ZAR	Yes
26 27 28 29 30 31	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369			15.00	ZAR	Yes
2 3 4 5 6 7 8	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369			16.00	ZAR	Yes
Clear	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369			15.00	ZAR	Yes
27/04/2018 12:04:16	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369		15.00	ZAR	Yes
03/04/2018 17:04:00	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369		14.00	ZAR	Yes
03/04/2018 16:41:08	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369		15.00	ZAR	Yes
03/04/2018 16:40:02	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369		14.00	ZAR	Yes
03/04/2018 15:59:25	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369		15.00	ZAR	Yes
27/02/2018 09:19:08	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369		14.00	ZAR	Yes
28/11/2017 09:13:42	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369		14.00	ZAR	Yes
14/07/2017 10:11:49	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369		14.00	ZAR	Yes
14/07/2017 10:11:05	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369		14.00	ZAR	Yes
25/05/2017 13:42:27	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369		14.00	ZAR	Yes
12/08/2016 18:26:22	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369		14.00	ZAR	Yes
11/04/2016 20:27:16	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369		14.00	ZAR	Yes
06/04/2016 12:08:23	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369		14.00	ZAR	Yes

- The Time Stamp column reflect your search parameters and all the historical data from the 1st January 2020 until the current date will display in the data grid.
- Clear** the search filter by deleting or back space over the text in the filter row of the **TimeStamp** column or click on the **Delete** icon in the **Edit Filter** row.



For a detailed handling of this topic refer to BPO2 Data Grid Filtering.

History Listing for Customer : TIA001 - BPO: Version 2.4.0.11 - Example Company

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Back Save Layout Refresh

Process... Format Curr

Drag a column header here to group by that column

TimeStamp	CustomerCode	CustomerType	CustomerName	CustomerCreditLimit	CustomerWebSite	CustomerPhoneNumber	CustomerVATNo	CustomerRegNo	TaxRate	Currency	IsDebtor
> 01/01/2020 00:00:00	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369		15.00	ZAR	Yes
14/07/2020 19:07:33	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369		15.00	ZAR	Yes
14/07/2020 19:05:54	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369		15.00	ZAR	Yes
14/07/2020 19:05:11	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369		15.00	ZAR	Yes
14/07/2020 19:04:58	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369		15.00	ZAR	Yes
22/04/2020 12:38:08	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369		15.00	ZAR	Yes
22/04/2020 12:37:59	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369		15.00	ZAR	Yes

Open Windows

User : Julendak 07/12/2020 Version : 2.4.0.11 Example Company

MODIFYING SCREEN LAYOUT

You may need to work with the column information that appear off the screen by dragging those columns to the view area of your screen.



For more information about editing the rows and columns refer to [BPO2 Data Grid Filtering](#).

HISTORY LISTING RIBBON TOOLBAR

1. If you wish to keep any changes that you have made to the data grid layout, click on **Save Layout**.
2. Click on **Back** to close the **History Listing for the Customer** and to return to the **Customer Listing** screen

History Listing for Customer : TIA001 - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Back Save Layout Refresh

Process Format Curr...

Drag a column header here to group by that column

TimeStamp	CustomerCode	CustomerType	CustomerName	CustomerCreditLimit	CustomerWebSite	CustomerPhoneNumber	CustomerVATNo	CustomerRegNo
30/08/2021 14:10:36	HO-TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369	
26/08/2021 14:35:09	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369	
14/07/2020 19:07:33	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369	
14/07/2020 19:05:54	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369	
14/07/2020 19:05:11	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369	
14/07/2020 19:04:58	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369	
22/04/2020 12:38:08	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369	
22/04/2020 12:37:59	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369	
21/08/2019 13:23:12	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369	
21/08/2019 13:22:59	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369	
07/05/2019 15:31:38	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369	
18/07/2018 11:21:50	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369	
18/07/2018 11:21:28	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369	
17/04/2018 12:04:16	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369	
03/04/2018 17:04:00	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369	
03/04/2018 16:41:08	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369	
03/04/2018 16:40:02	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369	
03/04/2018 15:59:25	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369	
27/02/2018 09:19:08	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369	
28/11/2017 09:13:42	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369	
14/07/2017 10:11:49	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369	
14/07/2017 10:11:05	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369	

Open Windows Capture screenshot User : JulandaK 19/11/2021 Version : 2.5.0.4 Example Company v2.5.0.0

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