

# **SALES**

## **CUSTOMERS - HISTORY**

The **History** tile can be found in both the <u>Customer Listing</u> and the <u>Customer</u> <u>Maintain</u> 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

	BPO: Version 2.5.0.0 - Example Company v2.5.0.0												
	Equipment / Locations	Contract	Finance / HR	Inventory Ma	aintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities		
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Customers	Services Commercials	POS Lite	Quotes Orders	Invoices Credit Notes	Statement Run								
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- 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 <u>up</u> and <u>down</u> *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.



	Home Equip	ment / Locations	Contract F	Finance / HR Inventory		ce / Projects	Manufacturin Durban	ig Procurement		Reporting Utilities	- 8
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		OFF001	RE	Office Supplies Unlimited			Durban	75,000,000,00	www.cnn.co.za	031 789 4561	987456321
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		GRE001	RE	Green Tea Supplies			Durban	75,000.00		031 456 7891	123456789
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- 6. 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 <u>most</u> <u>recent</u> information at the top of the data grid.

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

8. The *scroll bars* at the bottom and the side of the data grid indicates that <u>more information</u> 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 <u>specific</u> 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.

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

#### menu.

11. Select > - *Is greater than*.

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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		
	TIA001	RE	Titan Group	100.000.00	www.web.co.za	031 852 9632	123258741369		

- 12. Click on the down *arrow* in the *Time Stamp* column to display the *Calendar* function.
- 13. Scroll to January 2020.
- 14. Click on 1<sup>st</sup> January to update the filter search row with your search parameters.



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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
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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
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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

- 15. The Time Stamp column reflect your search parameters and all the historical data from the 1<sup>st</sup> January 2020 until the <u>current</u> date will display in the data grid.
- 16. 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.



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14	4/07/2020 19:05:11	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369		15.00	ZAR	Yes
14	4/07/2020 19:04:58	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369		15.00	ZAR	Yes
22	2/04/2020 12:38:08	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369		15.00	ZAR	Yes
22	2/04/2020 12:37:59	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369		15.00	ZAR	Yes

## **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



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	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	
1	03/04/2018 17:04:00	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	123258741369	
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1	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	

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