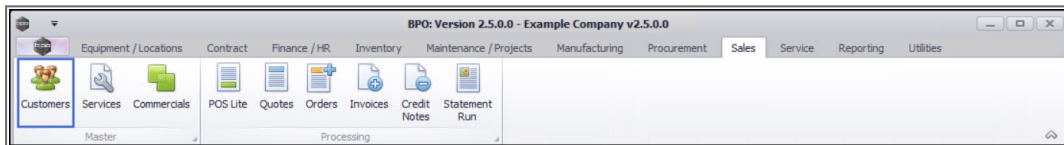


# SALES

## 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.

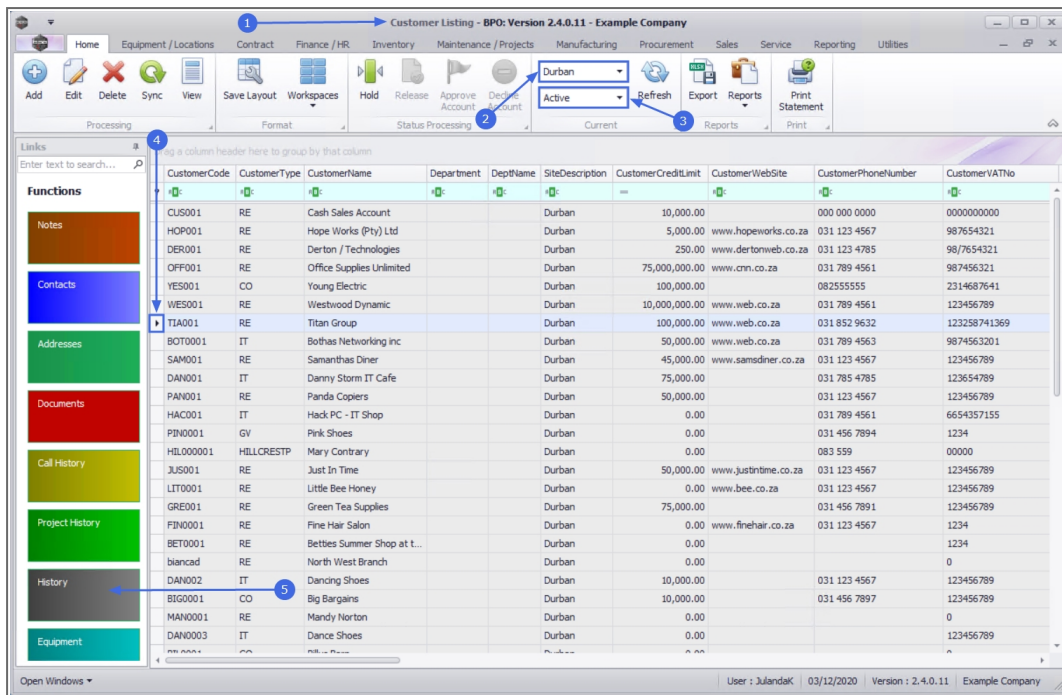
**Ribbon Access:** *Sales > Customers*



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.



6. The **History Listing for Customer: [customer code]** screen will display.
7. 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.

8. 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.

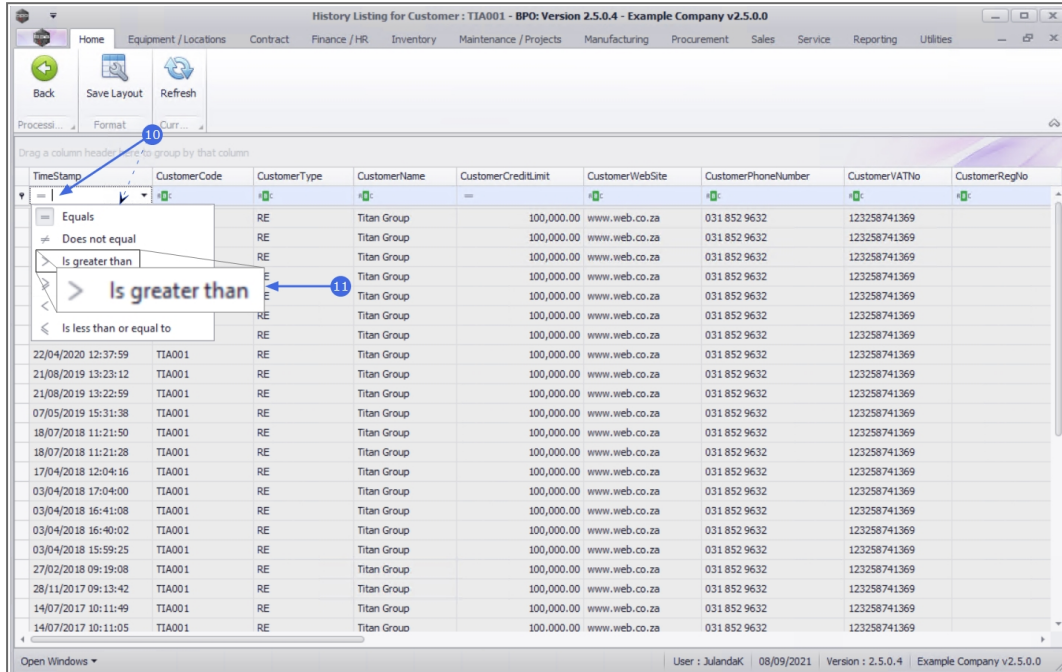
## SEARCH FOR SPECIFIC HISTORY PERIOD

9. 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 1<sup>st</sup> 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
17/04/2018 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 1<sup>st</sup> 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**.

TimeStamp	CustomerCode	CustomerType	CustomerName	CustomerCreditLimit	CustomerWebSite	CustomerPhoneNumber	CustomerVATNo	CustomerRegNo	TaxRate	Currency	IsDebtor
14/07/2020 19:07:33	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	122259741369		15.00	ZAR	Yes
14/07/2020 19:05:54	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	122259741369		15.00	ZAR	Yes
14/07/2020 19:05:11	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	122259741369		15.00	ZAR	Yes
14/07/2020 19:04:58	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	122259741369		15.00	ZAR	Yes
22/04/2020 12:38:08	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	122259741369		15.00	ZAR	Yes
22/04/2020 12:37:59	TIA001	RE	Titan Group	100,000.00	www.web.co.za	031 852 9632	122259741369		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

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 : JuJandaK 19/11/2021 Version : 2.5.0.4 Example Company v2.5.0.0

MNU.061.021