

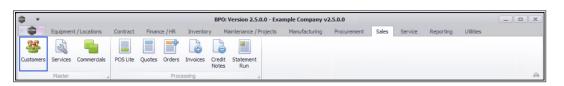
We are currently updating our site; thank you for your patience.

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



- 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.



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		DER001	RE	Derton / Technologies			Durban	250.00	www.dertonweb.co.za	031 123 4785	98/7654321
		OFF001	RE	Office Supplies Unlimited			Durban	75,000,000.00	www.cnn.co.za	031 789 4561	987456321
Contacts		YES001	со	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
Addresses		BOT0001	Π	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	Π	Danny Storm IT Cafe			Durban	75,000.00		031 785 4785	123654789
Documents		PAN001	RE	Panda Copiers			Durban	50,000.00		031 123 4567	123456789
		HAC001	Π	Hack PC - IT Shop			Durban	0.00		031 789 4561	6654357155
		PIN0001	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
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		BET0001	RE	Betties Summer Shop at t			Durban	0.00			1234
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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 most recent 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.
- 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		
14/07/2017 10:11:05	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 1st January to update the filter search row with your search parameters.



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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
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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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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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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

- 15. The Time Stamp column reflect your search parameters and all the historical data from the 1st 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.



	Home Equip	ipment / Locations	Contract Finance	ce / HR Inventory	Maintenance / Projects	Manufacturing Pr	ocurement Sales Servi	ce Reporting U	tilities			- 8
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	4/07/2020 19:05:11	TIA001	RE	Titan Group		www.web.co.za	031 852 9632	123258741369		15.00		Yes
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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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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	

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