

Customer – Customer History AV Ref # 575

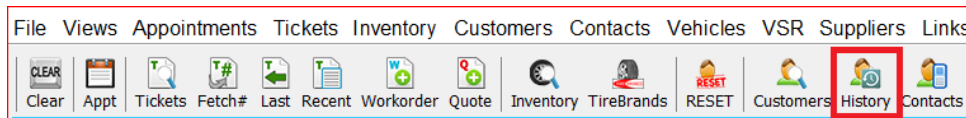
There is also a video showing how to perform this function:
Customer – Customer History (4:58) – AV Ref# 413

About:

One of the most powerful tools at your disposal is quick and easy access to accurate and detailed customer history. BPOS makes it incredibly easy to access customer history directly from an invoice or directly from the Customer Quick History button on the toolbar. (Note: This will display the customer's complete history. For vehicle-specific history, use the **Vehicle History** button.)

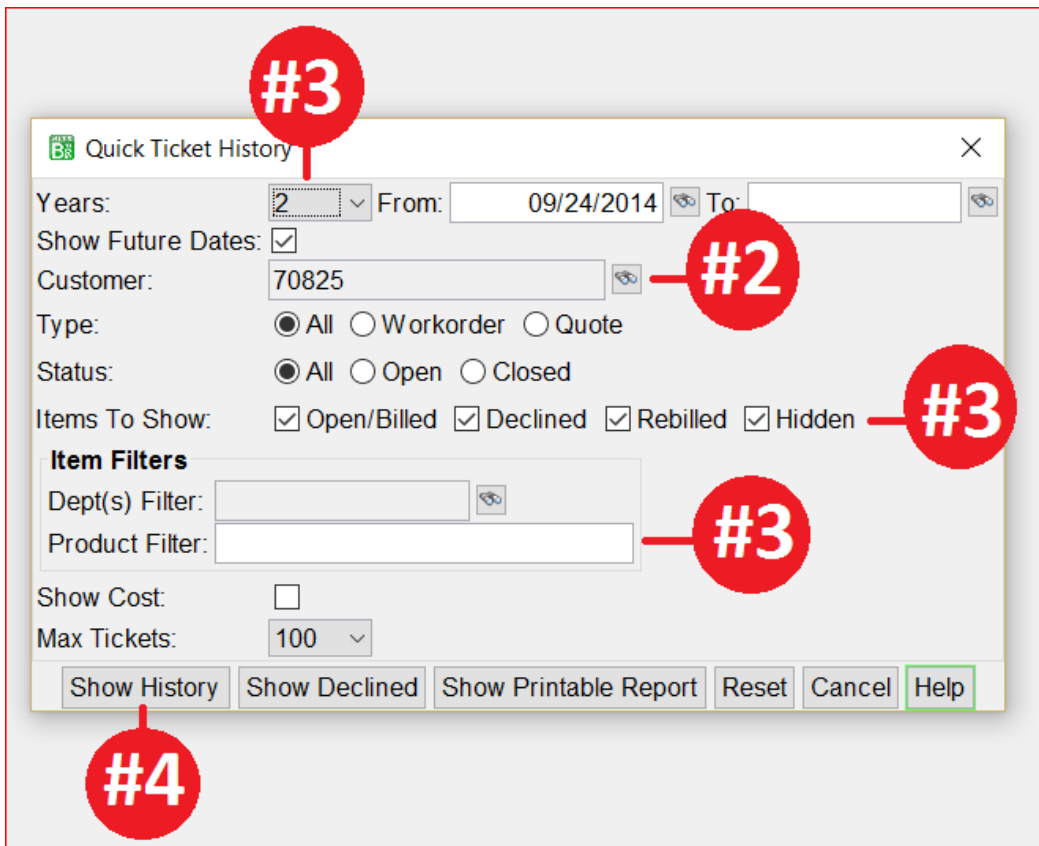
How:

1. You can easily access a customer's history by going to **Views** → **Sales Counter** → Click on the **History** button:



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2. On the **Quick Ticket History** selection screen (shown below), if the correct customer isn't already the Active customer showing, you can click on the binoculars beside **Customer** field to find your specific customer.
3. Make any other selections necessary. For example, you could expand the date range, search for only quotes, or even search for a specific product #. Please note, any selections will be retained temporarily until either you log out and log back into BPOS or you make changes to the lookup selections the next time you use it.
4. Click on **Show History** button:



The screenshot shows the "Quick Ticket History" dialog box with the following fields and controls:

- Years:** A dropdown menu showing "2".
- From:** A date field showing "09/24/2014".
- To:** A date field with a binoculars icon.
- Show Future Dates:** A checked checkbox.
- Customer:** A text field showing "70825" with a binoculars icon.
- Type:** Radio buttons for "All" (selected), "Workorder", and "Quote".
- Status:** Radio buttons for "All" (selected), "Open", and "Closed".
- Items To Show:** Checkboxes for "Open/Billed", "Declined", "Rebilled", and "Hidden".
- Item Filters:**
 - Dept(s) Filter:** A text field with a binoculars icon.
 - Product Filter:** A text field.
- Show Cost:** An unchecked checkbox.
- Max Tickets:** A dropdown menu showing "100".
- Buttons:** "Show History", "Show Declined", "Show Printable Report", "Reset", "Cancel", and "Help".

Numbered callouts are present:

- #3** points to the "Years" dropdown.
- #2** points to the binoculars icon next to the "Customer" field.
- #3** points to the "Hidden" checkbox in the "Items To Show" section.
- #3** points to the binoculars icon next to the "Dept(s) Filter" field.
- #4** points to the "Show History" button.

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- From the **Quick Sales Report For Customer** screen (shown below), you can review with your customer past work, past declined work, or even print the customer a report of past work done.

Quick Sales Report For Customer (70825) From 09/24/2014

Ticket Date	Ticket #	Product #	Description	QTY	PC	Amount	ST	Dept	ST#	Tech	SR#	Mileage	Unit Price	Total
03/19/2016	1670116	Closed Workorder	NISSAN MURANO SE/SLS 2007 (BEACHBND)			0.00								
		NC10	NC INSPECTION/EMISSIONS	1.00	0	0.00		E	6		625.0000	V		30.00
		991-EM	N.C. SAFETY EMISSIONS INSP	1.00	K	6.25		L			625.0000	V		6.2500
		NCE	N.C. SAFETY LABOR	1.00	K	23.75		L			625.0000	V		23.7500
		>>>>>>>>>>	PACKAGE TOTAL	1.00	K	0.00		E			625.0000	V		
03/18/2016	1069732	Closed Workorder	FORD F-150 2007 [SURFINI]			0.00								
		99B	COMPUTER BALANCE	4.00	1	0.00		T			-6.0000	R		
		*	COMMENT	1.00	0	0.00		X			-6.0000	R		
03/12/2016	1668090	Closed Workorder	FORD F-150 2007 [SURFINI]			0.00								
		*	LUBE OIL & FILTER SERVICE (LOFS) *	1.00	0	0.00		T			-6.0000	V		
		***	SPEC Viscosity (5W-20)	1.00	0	0.00		T			-6.0000	V		
		***	SPEC Recommended Engine Oil	1.00	0	0.00		T			-6.0000	V		
		(WSS-M2C930-A)		1.00	0	0.00		T			-6.0000	V		
		***	SPEC Engine Oil Capacity (7.0)	1.00	0	0.00		T			-6.0000	V		
		T500SP	T500SP OIL FILTER OIL FILTER	1.00	K	3.95		B			-6.0000	V		3.9500
		K530B	K530B 5W30 SYNTHETIC BLEND KENDAL	7.00	K	13.65		B			-6.0000	V		9.5000
		OPL_D	Remove & Replace Engine Oil Filter	0.40	I	0.00		B			-6.0000	V		
		OPL_D	* Drain & Refill Engine Oil	0.20	I	0.00		B			-6.0000	V		
		INCL LOGS-1	INCL LOGS-1	1.00	0	0.00		B			-6.0000	V		
		99LOM	OIL SERVICE LABOR	1.00	K	30.00		B			605.0000	V		30.0000
		99PM	COURTESY CHECK & TOP OFF FLUIDS	1.00	K	0.00		Q			-6.0000	V		
		99R	ROTATE TIRES/CK & ADJUST TIRE PSI	1.00	K	0.00		T			-6.0000	V		
		*	RESET OIL & TPMS LIGHT	1.00	K	0.00		X			-6.0000	V		
		GB134	FLUID ANALYSIS	1.00	K	0.00		J			-6.0000	V		
		>>>>>>>>>>	PACKAGE TOTAL	1.00	K	0.00		E			-6.0000	V		
		EF	ENVIRONMENTAL DISPOSAL FEE	1.00	1	3.00		X			-6.0000	V		3.0000
		OP \$10APPT	\$10 ONLINE APPOINTMENT	1.00	*	-10.00		U			-6.0000	V		10.0000
		99B	LIFETIME COMPUTER BALANCE	4.00	1	40.00		T			605.0000	R		10.0000
		99B	LIFETIME COMPUTER BALANCE	-4.00	1	-40.00		T			-6.0000	R		10.0000
03/05/2016	1066250	Closed Workorder	FORD F-150 2007 [SURFINI]			0.00								
		99BC	BRAKE INSPECTION	1.00	0	0.00		E			-6.0000	V		
		OPP	54107 FRONT HUB AND ROTOR ASSEMBLY	2.00	5	391.90		G			625.0000	V		150.9500
		OPP	DGC1011 FRONT CERAMIC PADS	0.00	4	89.95		G			625.0000	V		89.9500
		PAF-32	BRAKE FLUID EXCHANGE SERVICE	0.00	0	0.00		E			-6.0000	V		
		99BF	LABOR BRAKE FLUID FLUSH	1.00	K	50.00		E			625.0000	V		50.0000
		BK108	BRAKE FLUID SERVICE KIT	1.00	K	29.95		F			625.0000	V		29.9500
		>>>>>>>>>>	PACKAGE TOTAL	1.00	1	0.00		E			-6.0000	V		
		EF	ENVIRONMENTAL DISPOSAL FEE	1.00	1	3.00		X			-6.0000	V		3.0000
		99FB	BRAKE-REPLACE FRONT	1.00	1	99.00		E			625.0000	V		99.0000
		SS49	SS49 FRONT CHARGE	1.00	1	44.73		X			-6.0000	V		44.7300
02/01/2016	1650627	Closed Workorder	FORD F-150 2007 [SURFINI]			0.00								
		*	LUBE OIL & FILTER SERVICE (LOFS) *	1.00	0	0.00		T			-6.0000	V		
		***	SPEC Viscosity (5W-20)	1.00	0	0.00		T			-6.0000	V		

Closed Ticket Operations

Set Declined Set Rejected Set Hidden

Search Again... Add To Recent Ticket List Printable Report! Cancel Suggest Help

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Option Settings:

You can edit the permanent defaults Customer History Selection screen by going to Views → Administration & Utilities → Store → View/Edit Default Settings → Quick Customer/Vehicle History Reports.

****Note** – Users must have password permission to access View/Edit Default Settings (P99). If you need to give a user permission to have the permission setting, please contact your system administrator.