



Business Process Document

PS FIN Grants Suite Inquiries and Reports: Customer History

Department	
Responsibility/Role	
File Name	Customer History_BUSPROC.doc
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Customer History

Trigger:

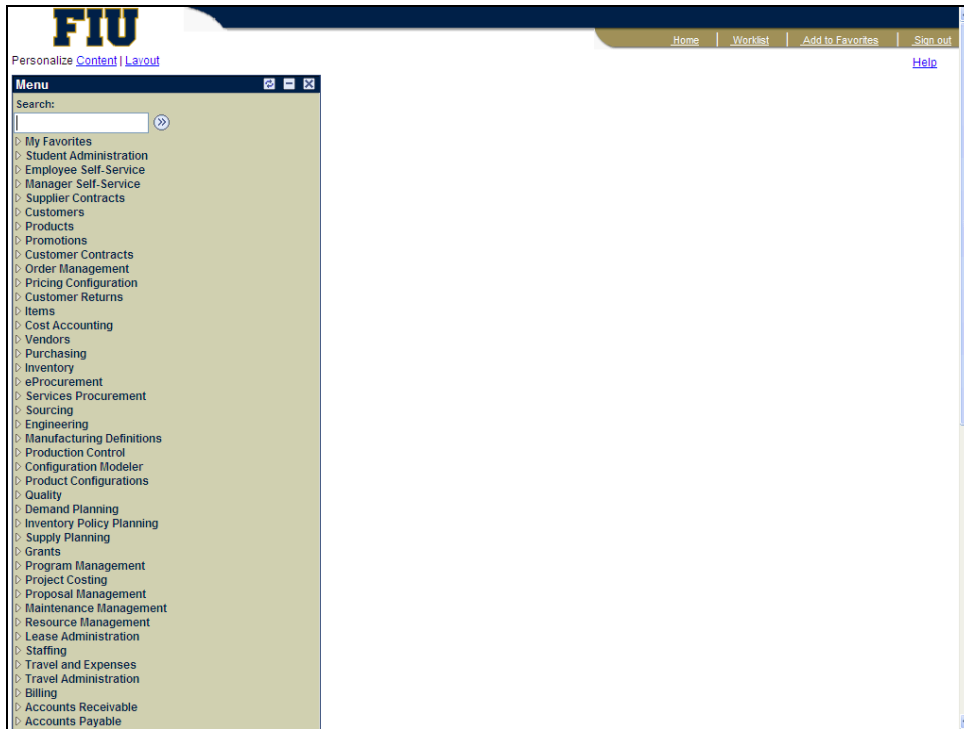
Required Field(s)	Comments


Output - Results	Comments

Additional Information

Procedure

The **Customer History Inquiry** allows users to view all transactions affecting an invoice, including both current unpaid transactions and past payment history.



Step	Action
1.	Click the Accounts Receivable link. 



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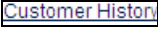



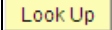



Step	Action
2.	Click the Customer Accounts link. ▶ Customer Accounts
3.	Click the Customer Information link. ▶ Customer Information

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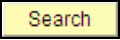



Step	Action
4.	Click the Customer History link. 
5.	Click in the Set ID field. 
6.	Enter the desired information into the Set ID field. Enter " FSR01 ".
7.	Click in the Unit field. 
8.	Enter the desired information into the Unit field. Enter " FSR01 ".
9.	Click the Look up Customer (Alt+5) button. 
10.	Enter the desired information into the Customer ID field. Enter " %7 ".
11.	Click the Look Up button. 
12.	Note: This page will allow you to select the Customer ID that you would like to view. However, for the purposes of this UPK, select the highlighted Customer ID hyperlink. 



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Step	Action
13.	Click the Search button. 
14.	Note: This page displays current balance and past due amount.
15.	Click the Home link. 
16.	Congratulations. You successfully ran a Customer History Inquiry. End of Procedure.