View Customer Purchase History

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Every purchase a <u>Customer</u> makes is associated with their customer record, so you can always go back and see what they purchased and when. This can be very helpful information when it comes to assisting customers on what products they last purchased. This article will walk you through how to view information about a customer's purchase history.

To view a Customer's purchase history, follow the steps below:

• Step 1 - In the **Retail** module click on **Customers** in the navigation pane to view a list of current customers.



• Step 2 - Double-click on the desired **Customer** to open the detail view of the customer record.

File Home											
New T	Save Save a Close	nd Cancel	Open Related Record	Refresh Reset View Settings	Customers	Previous Record	Next Record	Text to search	Close		
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O customers ×											
y Type Keywor		Full Name					Marijuana ID	Marijuana ID	Contact Type	Sales Person	Reward Availabl
📜 Retail 🔷 📥 Evelyn Ryan					(520)488-4118	0088QPV8840	0 10/4/2019	Customer		\$1.2	
	Gene Simmons					(540)219-9387	0997QPV9489	05 7/29/2019	Customer		\$0.0
Jules Queue	J G					(520)999-8877	0112899CGLV	7/30/2019	Customer		\$0.0
Customers Jeremy Vargas					(520)488-9028	78798QPV849	0 11/22/2019	Customer		\$0.0	
S Daily Batch Michelle Williams					(520)228-1192	0099QPC9985	i 9/1/2019	Customer		\$2.5	

• Step 3 - In the **Sales History** section, you can view all purchases made by that customer. Double-click on an individual invoice record to view the full invoice for that purchase.

Reward Points		rd Points	Sales History	Sales Notes Tasks	Tasks 🥜 File Manager			
	#	Status		Invoice	Invoice Date	Sales Person	Total 👻	
	1	Invoice		100025	12/5/2018 3:27 PM	Green, John	\$34.96	
	2	Invoice		100020	10/31/2018 5:53 PM		\$31.78	
	3	Invoice		100022	11/4/2018 10:22 AM	Green, John	\$30.51	

This is a great feature if you need to help a customer remember what they have purchased in the past!

