

A RETAILER'S BEST FRIEND.



Customer History

Prism

<https://youtu.be/d-NkOXwST1k>

Using Prism, you can easily view a customer's entire purchase and return history, and pull up and print any past documents associated with that customer from one place.

To view customer history in Prism:

1. Navigate to the Customers module
Customers>Customer Look Up

Select desired Customer by clicking check mark to the left of their name and then hit the Details Button.

Customer Search

Filters

Search By

Select... Active Inactive All

+ Full Name

Liz Martinez Equals

Results

Total Records 1

<input checked="" type="checkbox"/>	First Name	Last Name	Address 1	Phone	Email Address
<input checked="" type="checkbox"/>	Liz	Martinez			

Clear Search Selected 1

New Edit Copy Deactivate Details Options retailpro



2. You'll see a screen with a bit more details for this customer. Selecting the Options button on the lower right side. Select the Customer History option.

Customer

Details

First Name: Liz, Title: [dropdown]
Last Name: Martinez
Customer ID: 10000002, Company: [text]
Share Type: Global, Primary Associate: Select...
Subsidiary: 001, Region: [dropdown], Store: 001
Notes: [text area]
Info 1: [text], Info 2: [text]
Mark 1: [text], Mark 2: [text]

Contact

Addresses: No Records Found
Phones: No Records Found
Emails: No Records Found

Contact | Payment | Statistics | UDF Fields

New | Edit | Copy | Deactivate | List View | Options | retailpro

3. Using the “Search By” drop down will add additional filtering options that can be layered and removed as needed. Hitting the Search button with no filters will show all transactions.

Customer History

Filters

Search By: Select... [dropdown]

Results

Description 1	Descriptio...	Attr	Size	Item Type ...	Doc Qty	Doc Price ...
** BAG BALM-4.5#		+		Sale	1	\$65.99
** CANIDAE-CHICKEN & RICE 30#	BAG/DOG/...	^		Sale	1	\$39.99
** FELIDAE-CAT & KITTEN 15#	BAG/CAT/15#	^	/	Customer ...	1	\$31.99
**BACKYARD CHICKEN HEALTH P...				Sale	1	\$39.99
***THERACYN-WOUND SPRAY 16...				Sale	1	\$15.99
***THERACYN-WOUND GEL 16OZ				Sale	1	\$17.99

Clear | Search | Selected 1

Go To Transaction | Customer Statistics | Cancel



4. Search By example:

Additional filters added from Search By drop down

Search By

Size

+ Description 1

Description 1

+ Size

Size

Clear Search

5. Highlighting and checking the desired transaction will allow you to use the “Go to Transaction” button and get more information on that specific transaction.

Customer History

Filters

Search By

Select...

Results

Total Records 6

Description 1	Descriptio..y	Attr	Size	Item Type ..y	Doc Qty	Doc Price ..y
** BAG BALM-4.5#		+		Sale	1	\$65.99
** CANIDAE-CHICKEN & RICE 30#	BAG/DOG/...	^		Sale	1	\$39.99
** FELIDAE-CAT & KITTEN 15#	BAG/CAT/15#	^	/	Customer ...	1	\$31.99
** BUCKYARD CHICKEN HEALTH P...				Sale	1	\$39.99
** THERACYN-WOUND SPRAY 16...				Sale	1	\$15.99
***THERACYN-WOUND GEL 16OZ				Sale	1	\$17.99

Clear Search

Selected 1

Go To Transaction

Customer Statistics

Cancel



The following is an example of a Past Transaction, you can reprint or email (must have email server preferences configured) using Print button on this screen.

Item	UPC	Price	Type
WIDE STRIPE BEACH TOWEL Quantity 1	0000000002554	\$250.00	Sale
BRUSHED JERSEY WRAP DRESS Quantity 1	0000000001557	\$245.00	Sale
NECKLACE Quantity 0	0123123123217	\$65.99	Void

Store Number	2
Sale Sale No	5
Cashier	sysadmin
Sold Qty	2
Sales Subtotal	\$495.00
Sales Tax	\$37.13
Transaction Total	\$532.13

\$0.00

Tender Transaction

Print

