View Customer Activity

This guide covers how to view the Customer Activity page for a customer.

Steps to complete:

- Step 1: Search for a Customer to View
- Step 2: Review History of Item Activity
- Step 3: View Item Detail
- Step 4: View Additional Activity tabs

Step 1: Search for a Customer to View

1. Navigate to the Customer Activity search page using the instructions below.

<table>
<thead>
<tr>
<th>Navigation Options</th>
<th>Navigation Path</th>
</tr>
</thead>
<tbody>
<tr>
<td>Navigation Collection</td>
<td>Accounting, Accounts Receivable, Review Payments and Items, left-menu, Customer Activity.</td>
</tr>
</tbody>
</table>

2. Accept the default SetID and Unit or select different options from the Lookup icon. Normally, the SetID and Unit will be the agency Business Unit.

3. Enter Customer ID.

4. Optionally, select From and To Accounting Dates.

5. Click the Search button. The Item Activity section displays information for the customer.

Note: The Direct Journal tab is not being used by the State of MN.
Step 2: Review History of Item Activity

Review a history of item activity for a customer on the Activity 1 tab. Customer activity information displayed on the Item Activity page includes:

- Accounting Date, Item ID, and Line number.
- Entry Reason, if applicable.
- Entry Amount.

Step 3: View Item Detail

1. You can click on the Item ID link to view additional detail for the specific Item.
2. The Add/Update Item Details page (Item Maintenance) opens with the **Detail 1** tab displayed by default.

- The **Detail 1** page displays the Item Status (Open/Closed) in the header, and the **Customer Relations** section where Items can be placed in Dispute or Collections.
- Refer to the “Add/Update Item Details” guide for more information.

3. Click **OK** to return to the **Customer Activity** page with **Activity 1** tab displayed.
Step 4: View Additional Activity Tabs

More information is available on the Activity tabs 2-6.

1. Click on the Activity 2 tab. Information displayed includes:
   - Number of Activities for the item. Activities includes payments, credits, etc. You can click on the Item ID and click on the Item Activity tab to view more detail about the activities.
   - As of Date and Date Posted to customer’s account.
   - Processing Group ID and Group Type including: B – Billing; F – Overdue Charges; M – Maintenance; and P – Payment.

2. Click on the Activity 3 tab. Information displayed includes:
   - Deposit ID and Payment ID entered when creating the deposit.
   - Payment Sequence references the payment row when creating the deposit.
   - Document and Document Line include information if applicable. For example, if the item was a credit, the original invoice ID would be displayed.
   - Purchase Order and PO Line information if applicable.

3. Click on the Activity 4 tab. Information displayed includes the Contract information, if applicable.
4. Click on the **Activity 5** tab. Customer Activity displayed on the **Activity 5** page includes:

- Default Credit Analyst, Sales Person, and Collector.
- Unpost Reason Codes which include: BUDERROR -- Budget Error; WRGCUST -- Applied to Wrong Customer; WRGINV: Applied to the wrong invoice; NSF – Non-Sufficient funds.
- Voucher ID, if applicable (Refunds).

**Note:** Activity 6 tab is not being used by the State of MN.