

Temp Projects - Tasks #5333

Sales Rep should be updated for Customer creating from Sales screen

01/17/2022 11:06 AM - Rijas P

Status:	Closed	Start date:	01/17/2022
Priority:	Urgent	Due date:	
Assignee:	Mohamed Suhail	% Done:	100%
Category:		Estimated time:	0.00 hour
Target version:		Spent time:	0.75 hour
Description			
Currently if we create a customer from Sales screen, the Sales rep not updating to the Customer master.			
1. Need an option to choose Sales rep in Customer creation Sales screen [Better option]			
OR			
2. The user who creating customer should be updated as Sales rep in Customer Master.			

History

#1 - 01/20/2022 10:11 PM - Noufal K

- Assignee changed from ERP Team to Shemil Ali

check and if issue exist craete bugzilla

#2 - 01/21/2022 11:29 AM - Shemil Ali

- Assignee changed from Shemil Ali to Mohamed Suhail

this is not a bug its an enhancement

suhail

Should we do this now

#3 - 01/21/2022 11:40 AM - Mohamed Suhail

Shemil Ali wrote:

this is not a bug its an enhancement

suhail

Should we do this now

We can do this as part of this enhancement ticket - https://bugzilla.posibolt.com/show_bug.cgi?id=6349

#4 - 01/25/2022 09:01 PM - Mohamed Suhail

- Assignee changed from Mohamed Suhail to Rijas P

Rijas P wrote:

Currently if we create a customer from Sales screen, the Sales rep not updating to the Customer master.

1. Need an option to choose Sales rep in Customer creation Sales screen [Better option]

OR

2. The user who creating customer should be updated as Sales rep in Customer Master.

#5 - 04/06/2022 03:46 PM - Noufal K

- Status changed from New to Resolved

implemented the changes, will be available in next tag release

#6 - 04/19/2022 02:34 PM - Noufal K

Rijas, Fix available in euro test, please check

#7 - 04/19/2022 03:31 PM - Rijas P

- File WhatsApp Image 2022-04-19 at 1.46.33 PM.jpeg added

Dear Noufal,

Found only 4 columns while creating new customer from Sales screen. How can we add the additional fields to the POP up?.

#8 - 04/19/2022 04:26 PM - Noufal K

- Assignee changed from Rijas P to Mohamed Suhail

Suhail, Please do the needful.

#9 - 04/19/2022 08:12 PM - Mohamed Suhail

Noufal K wrote:

Suhail, Please do the needful.

Rijas,

Let us know which all fields from the previous customer creation is needed for your business. So that we can enable it

#10 - 04/20/2022 04:35 PM - Rijas P

Please see the required fields for Customer creation from Sales screen.

1. Name
2. Last Name
3. Mob No
4. Vat No
5. Address
6. Address 2
7. Region
8. Sales Rep
9. Email
10. Credit Limit
11. Tax Exempt
12. Sales Region

#11 - 04/20/2022 11:07 PM - Mohamed Suhail

- % Done changed from 0 to 100

Rijas P wrote:

Please see the required fields for Customer creation from Sales screen.

1. Name
2. Last Name
3. Mob No
4. Vat No
5. Address
6. Address 2
7. Region
8. Sales Rep
9. Email
10. Credit Limit
11. Tax Exempt
12. Sales Region

Set up the same on test server. Please test

#12 - 05/08/2022 12:19 PM - Mohamed Suhail

Mohamed Suhail wrote:

Rijas P wrote:

Please see the required fields for Customer creation from Sales screen.

1. Name
2. Last Name
3. Mob No
4. Vat No
5. Address
6. Address 2
7. Region
8. Sales Rep
9. Email
10. Credit Limit
11. Tax Exempt
12. Sales Region

Set up the same on test server. Please test

Set up the same on live server. Please check

#13 - 05/10/2022 02:13 PM - Noufal K

- *Status changed from Resolved to Closed*

#14 - 05/21/2024 04:07 PM - SHAIJAL EDAVANA

- *Tracker changed from Bug to Tasks*

- *Project changed from Euro Novelties to Temp Projects*

- *Category deleted (Others)*

Files

WhatsApp Image 2022-04-19 at 1.46.33 PM.jpeg	63.9 KB	04/19/2022	Rijas P
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