

TAAS - Feature #461

Mark Customer Inactive if no transaction for 6 months not happened

01/07/2025 12:09 PM - Theja Ponon

Status:	Ready for Coding	Start date:	01/07/2025
Priority:	Normal	Due date:	
Assignee:	aryamol Vh	% Done:	20%
Category:		Estimated time:	0:00 hour
Target version:	22.12	Spent time:	0:00 hour
Owner(Agency):	NBK - Qatar	Tested By:	
Time Taken(HH):		Code Reviewed By:	
Module:	NBK Requirements		
Description			
System will mark a customer as inactive incase of no transactions happened for the customer for the six months -NBK Requirement			

History

#1 - 01/16/2025 06:36 PM - Theja Ponon

- Description updated

#2 - 01/27/2025 12:18 PM - Anil KV

- Status changed from New to Ready for Coding

- Assignee changed from travvise Admin to Amal Mathew

- % Done changed from 0 to 20

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461->Mark Customer Inactive if no transaction for 6 months not happened
=====
Menu:- Report -> Audit Report -> Inactive Accounts
=>Input:-
->Account Category*R multi select - Load journal gui popup -> Account label dropdowns(Account Not Need) - Default Tick Customer
->Inactive Period Chckbox | Month/Days/Years*r inputbox - Default month->6, Date: title:- Last Transaction Date -> Ref Logic->1
*Checkbox group->title->Tick means no transaction accounts,
* Tick then disable inputbox and value empty
->Account Status - Mult Select -> ref Customer GUI status -> Untick 'Close' and 'Block'

=>List
->Header Grouping No Grouping/Category/Type/Group/Family
# | Checkbox | Code | Name | Phone | EMail | Address | Account Balance(Dr-Cr) | Status | Last Document -> Date
  | Last Document -> Number | Last Document -> Amount | Account Query Redirect icon
* Last Document main colus

=> Right side main button last
-> Add 'Block' Button

=> Logic
-> Find out a datInputLastTranDate based on 'Inactive Period' and Current date
-> SQL

WITH cte AS (SELECT ROW_NUMBER() OVER (PARTITION BY tr.fk_ledger_id ORDER BY tr.dat_transaction DESC, pk_transaction_id DESC) AS int_row_number,
             tr.fk_ledger_id,
             ac.vhr_account_code,
             ac.vhr_account_name,
             ac.vhr_display_name,
             ac.sin_ac_category,
             ac.fk_category_id,
             ac.fk_group_id,
             ac.fk_type_id,
             ac.fk_family_id,
             ac.vhr_phone,
             ac.vhr_email,
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        ac.vhr_address,
        tr.dat_transaction,
        tr.fk_documents_id,
        doc.vhr_document_no,
        doc.-amount,
        doc.-doc_date
    tr.dbl_base_cur_debit,
        tr.dbl_base_cur_credit
    FROM transaction.tbl_transaction tr
    LEFT JOIN accounts.tbl_account ac
        ON tr.fk_ledger_id = ac.pk_account_id
    LEFT JOIN document.tbl_documents doc
        ON tr.fk_documents_id = doc.pk_documents_id
    WHERE sin_ac_category IN (1,5,8)
    AND sin_record_status IN (1,2)
    AND dat_transaction < datInputLastTranDate
    AND tr.fk_ledger_id NOT IN (SELECT DISTINCT fk_ledger_id FROM transaction.tbl_transaction WHERE da
t_transaction >= datInputLastTranDate ))

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    SELECT trc.fk_ledger_id,
        trc.vhr_account_code,
        trc.vhr_account_name,
        trc.vhr_display_name,
        trc.sin_ac_category,
        trc.fk_category_id,
        trc.fk_group_id,
        trc.fk_type_id,
        trc.fk_family_id,
        trc.vhr_phone,
        trc.vhr_email,
        trc.vhr_address,
        trc.dat_transaction,
        trc.fk_documents_id,
        trc.vhr_document_no,
        trc.-amount,
        trc.-doc_date
    trc.dbl_base_cur_debit,
        trc.dbl_base_cur_credit,
    lsum.dbl_total_base_cur_debit,
        lsum.dbl_total_base_cur_credit
    FROM cte AS trc
    LEFT JOIN (SELECT fk_ledger_id
        SUM(dbl_base_cur_debit) AS dbl_total_base_cur_debit,
        SUM(dbl_base_cur_credit) AS dbl_total_base_cur_credit)
    FROM cte
    GROUP BY fk_ledger_id) lsum
    ON trc.fk_ledger_id = lsum.fk_ledger_id
    WHERE int_row_number = 1

```

#3 - 01/27/2025 12:36 PM - Anil KV

If not transaction account SQL

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SELECT ...
FROM accounts.tbl_account
WHERE pk_account_id NOT IN (SELECT DISTINCT fk_ledger_id FROM transaction.tbl_transaction))

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#4 - 02/18/2025 10:27 AM - Theja Ponon

- Assignee changed from Amal Mathew to aryamol Vh