Customer Maintenance Change Viewer

The Customer Maintenance Changes Viewer stores a record of every change made in Customer Maintenance, including any customer accounts added, changed, or deleted. Accounts added through POS are also recorded in the Customer Maintenance Changes Viewer, as well as any changes made to account numbers in the Change Customer Number/Job dialog.

Changes made in legacy MCR, CCN, and CCJ are not recorded in the Customer Maintenance Changes Viewer.

When account information is changed, one change record is generated for each field changed. For example, if you change both an account's Phone Number and Contact, two change records are generated— one for phone number, another for contact. The Viewer also tracks changes in the MCR “Customer Status” field. The Source of the change will be ‘Cust Maint’ when it is updated from MCR or by RCCU. The Source will be ‘POS’ once a clerk reviews and corrects the customer’s information in POS. This field does NOT apply to Ace Rewards customers.

To review the Customer Maintenance Changes Viewer, you access it from the Go To menu in Customer Maintenance. You can choose to view a particular account's change records, or you can view all customers for a range of dates. When viewing by date, you can view all changes, or you can limit what displays: you can view only changes to a particular field, only accounts added, or only accounts deleted. For example, you can view all instances in the last month of the Credit Limit field being changed on any account. The log will show each customer/job whose credit limit was changed, when it was changed, who changed it, and the old and new credit limit amount. You can even view a snapshot of how the account looked before the first change was recorded by double-clicking on "Starting Detail" in the Viewer.

The Licensing Department or Eagle Advice Line must activate the flag "Customer Maintenance Changes Viewer on System" in Options Configuration.

Assign security for the Customer Maintenance Changes Viewer to the appropriate employees. Assign bit 694 for employees who will have access to the Customer Maintenance Changes Viewer.

You may also consider using bits 236 and 309, for access and add/change/delete capabilities for extended descriptions (MED) so that you can add notes.

Use the following procedure to view the Customer Maintenance Changes Viewer, which displays any changes that were made in Customer Maintenance, including any customer accounts added, changed, or deleted.

Display the Customer Maintenance window. Click Go To, and select View Customer Maintenance Changes. To display the Maintenance Changes viewer by customer. Select the customer from the drop-down list, and click Display (if you already had the customer displayed in Customer Maintenance, the information for that customer displays automatically).

If "Added" is displayed in the What Changed column you can double-click on it to display a snapshot of exactly how the account looked when it was added. Notice you can also click any of the links (Credit, Dept, Sales, Payment, etc) to display snapshots of the other screens of Customer Maintenance.

To display the Maintenance Changes Viewer by date click the "By Date" link. You can also limit what displays in the grid by filling in any or all of the following fields: Start, Ending, and Fields. Then click Display to refresh the grid. If you want to see a snapshot of the "starting detail" of an account (how the account looked before the first change was recorded), double-click "Starting Detail" for that account.

Notice you can also click any of the links (Credit, Dept, Sales, Payment, etc) to display snapshots of the other screens of Customer Maintenance.

About Epicor

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