

# Customer Change Log Report

Last Modified on 04/12/2024 3:47 pm CDT

The following items are currently written to the database and are available on a report called Customer Change Log found at *Accounting Reports / Accounts Receivable / A/R Status*:

- **\*\*\*Customer Added**
- **\*\*\*Customer Address 1**
- **\*\*\*Customer Address 2**
- **\*\*\*Customer Address 3**
- **\*\*\*Customer Adjustment Code**
- **\*\*\*Customer City**
- **\*\*\*Customer Country**
- **\*\*\*Customer County**
- Customer Credit Limit
- Customer Credit Line
- Customer Credit Status
- Customer Date Opened
- **\*\*\*Customer Deleted**
- **\*\*\*Customer Extra Charge (Added/Deleted)**
- Customer Finance Charge %
- **\*\*\*Customer First Name**
- Customer Has a Credit Line
- **\*\*\*Customer Last Name**
- Customer P.O. Required
- **\*\*\*Customer Salesperson**
- **\*\*\*Customer Sales Taxable**
- **\*\*\*Customer Sales Tax Rate**
- **\*\*\*Customer State**
- **\*\*\*Customer State Code**
- **\*\*\*Customer Tax Exempt ID**
- **\*\*\*Customer Tax Exemption Reason**
- **\*\*\*Customer Territory**
- **\*\*\*Customer Zip**

If the *Extended Customer Edits Tracking* option is not selected at *Hub / Setup / Company Preferences* on the *Customer* tab, items in bold will NOT be tracked and available on the Customer Change Log Report.

Preferences

General Field **Customer** Product Farm Grain Scale Interface API

Customer Classifications

Customer Attributes

Add Customer Setup  
 Auto ID   
 Zero Pad

<Default Classification>

<Require Customer E-Signature Agreement>

Duplicate Customer Checking  
 Elements (None)   
 Warning Warn Only  Match Type Exact Match

Cross Reference

1	MeppellID	Customer ID Source (Printouts)
2	MeppResale	Agvance ID <input type="text"/>
3	ResellerID	Customer ID Source (Selecting)
4	Cross Ref4	Agvance ID <input type="text"/>
		Check For Duplicates (None) <input type="text"/>

Extended Customer Edits Tracking  
 Load customer list only when requested  
 Suppress Customer/Location Warning  
 Export CRM PDF's to MyFarmRecords

Method to Check Sale of Restricted Products Warn Only

Source of Customer Permit Checking Federal

Ship To Cross Reference

1	<input type="text"/>
2	<input type="text"/>
3	<input type="text"/> PO Ship To Source
4	(None) <input type="text"/>

Add Cash Customer Setup  
 Auto ID  Zero Pad   
 Salesperson Farbre   
 Credit Limit 1000   
 Credit Status Good   
 Credit Date Opened Blank   
 <Classification>   
 Default Terms (None)   
 Check What Customer Address Address 1

AGIS Setup KwikTag Setup Print Save Cancel

These items are set on the Customer's *Credit* tab from the Accounting module.

Edit A Customer - AndBa Barry Anderson

Profile Monthly Balances **Credit** Miscellaneous Info Activity CRM Grain Information

Date Opened 05/31/1992

Last Financial Stmt

Credit Status Excellent

Last Credit Review

Finance Charge% 0

Never Send Collection Letter

Days To Pay

Since Invoice Date

Since Due Date

Calculate

Credit Limit 50000

Available Credit 8091.50

Months Over Limit This Year 0

Months Over Limit Last Year 0

High EOM Balance This Year 0.00

High EOM Balance Last Year 572.60

P.O. Required

Notes

Credit Line

Credit Line (None)

Credit Line Amount \$ 0

Credit Actions

Influences Tech Lic #s State Permits Contacts Addresses Save Cancel

The report displays as follows:

## Customer Change Log

Sorted by Date

<u>Record Type</u>	<u>Customer Name/ID</u>	<u>ChangeLocation</u>	<u>Change Type</u>	<u>Change Date</u>	<u>Old Value</u>	<u>New Value</u>
C	Barry Anderson(AndBa)		Customer P.O. Required	04/12/2024	No	Yes
C	Barry Anderson(AndBa)		Customer Finance Charge %	04/12/2024	0	5