

Event Logs Tab

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The Event Log tab shows events on the customer record. These events include invoices, work orders, RMR, payments, estimates, and updates to the customer, system, and site records.

There is also an Export to Excel button in the grid. Click this to create and download an Excel file showing the date in the grid with the column headings shown on the grid. Leaving the From Date and To Date fields blank exports all events to the spreadsheet. Users can enter a From Date and To Date to narrow the number of events shown on the grid and export that list to a spreadsheet. This improves audit capabilities, reporting, and usability. This is for SOX audit compliance requirements, providing an updated audit trail that can be run as needed.

