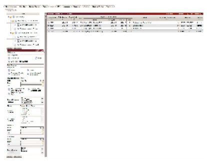
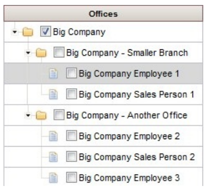
Tasks - Customer



The Tasks tab records all the tasks of a customer. The main p
this tab is to enable a user to efficiently monitor the project t
customer.

- To view all ongoing tasks associated with this custom
  the Current tab.
- To view all tasks – both current and finished – select

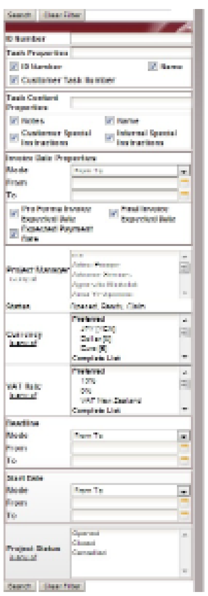
Offices



The branches of a company and their staff.

> The Offices panel is only visible if you previously define
> customer on the Offices tab as either an office or a me
> specific office. For a further description of the Offices t
> marking customers as either offices or staff of a specif
> click here: Offices - Customer.

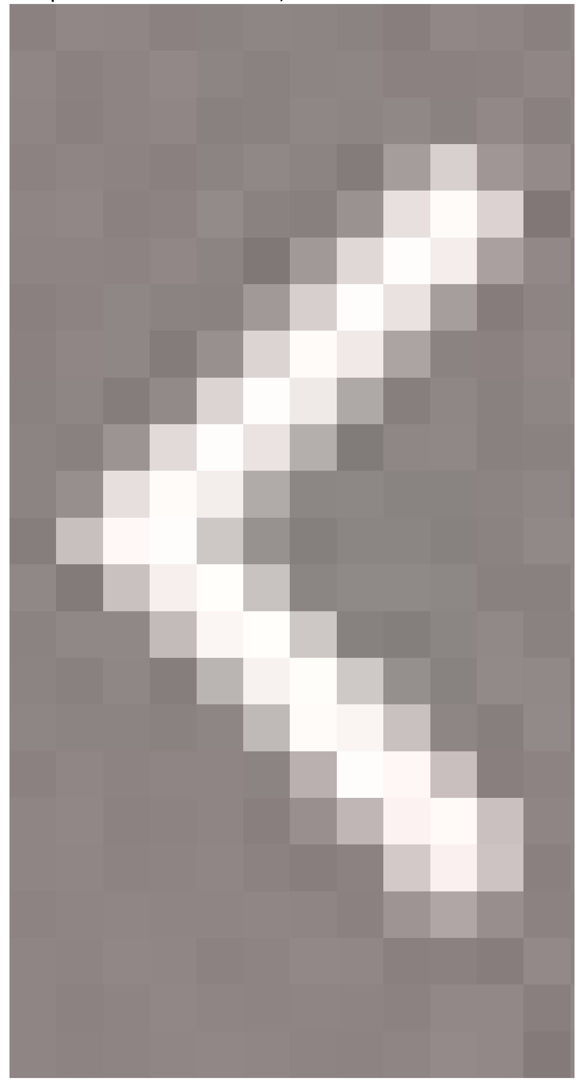
Search Filter



The filter is used to limit your search for tasks.

- To adjust the width of the filter, click and hold
  
  . While holding the icon, move your cursor to the left
  screen to decrease or to the right side of the screen t
  the size of the filter.

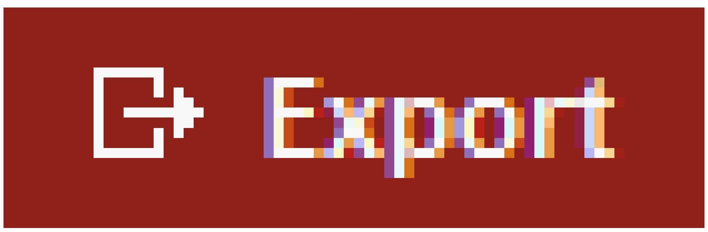
<table>
<tr><td></td><td>

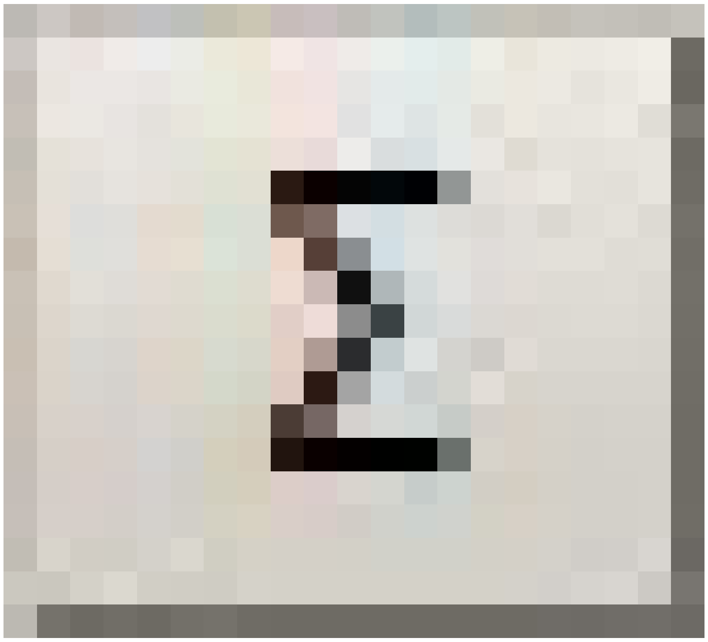
- To open or close the filter, click .

Configuring Search Filter Panel
You can configure the filter and the way the entities ar
displayed in the View Editor pop-up window.

View Editor Pop-up Window

</td></tr>
<tr><td>
</td><td>Click to begin filtering the data.</td></tr>
</table>

	Click to cancel the past filters.
Customer's Current Tasks/Customer's Tasks	
	Here you can view and manage the history of the customer's When you click on the name of a task, you are taken directly Display. If your customer is an office or a member of an office, entities displayed in the customer's tasks list belong tc whichever customer selected in the Offices panel. For (you select Big Company Employee 3 from the data tre(table includes all the tasks for this specific customer. Additionally, if you select two or more customers from tree, the customer's tasks list contains all the tasks for selected customers.
	Click to format the data from the Customer's Current Tasks/C Tasks table so that it can be used in another application. Whe on the button, the Export Data window appears. Export Data Pop-up Window
	Click to update the entities in the Customer's Current Tasks/(Tasks table.
	Click to configure what and how information will be displayed mer's Current Tasks/Customer's Tasks table. When you click Create new view , a new window appears. View Editor Pop-up Window

	The Summation Icon is used to calculate either the Total Agre Cost value. When you click the button for either the Total Agreed or Tota window appears. For a description of the window, click here: Sum: Total Agreed/Total Cost.
	Click to modify the tab.
	Click to apply any modifications.
	Click to terminate the modification process.
	Click to create an estimate for a project of this customer. When you click on this button, you are taken to a new page. description of the page, click here: Quote Create.

	Click to create a project for this customer. When you click on this button, you are taken to a new page. description of the page, click here: Project Create.