

Customer Dashboard Menu

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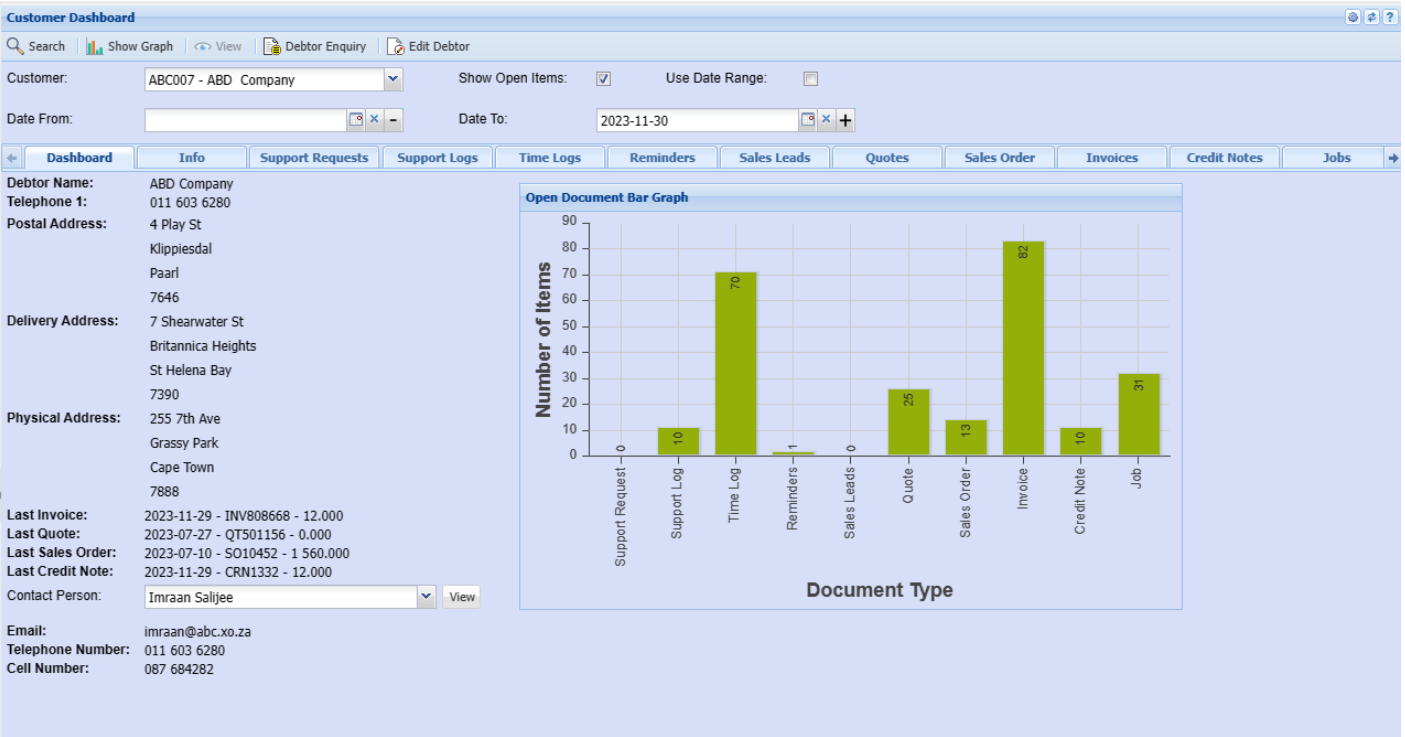
Debtors Module> Activity> Customer Dashboard

Customer dashboard is like your personal control center for all things related to your customers. It's a webpage or screen that brings together important info and key stats about your interactions with customers.

Customer dashboards give you an overview of a clients activities and transactions

You can only select one client at a time

If you do not select a debtor/ customer you will receive an error



Show Graph	Shows a graph with a summary of client's activities
Debtor/ Customer Enquiry	The customer inquiry window allows you to view the customer at a quick glance Information on invoices in payments. Debtor enquiry allows you to view all transactions against the client
Edit Debtor/ Customer	This button will take you back to customer setup screen to edit debtor/customer details For a detailed manual on how to edit debtor/ customer click here

Customer	Select a debtor/ customer you want to view the dashboard for
Show Open Items	Include items that are not yet completed to the dashboard
Use Date Range	You can also view by date range
Date From / Date To	Choose the date range for which you want to view the report from Select a date range of when you want to see the report to