

Tabs on Detail Pages

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Overview

Tabs act as the major source of navigation within *Details* pages. Tabs are found on the bottom half of the page and the available tabs will vary depending on which Details Page you are working on.

The Tabs have the same general options as Lists:

- **Modify List Options:** Ability to *filter your data, change the information displayed in the columns & modify the number of records shown per page/the default search by field*. The *Modify List Options* is symbolized as Gear icon.
- **Print:** Allows you to *make a printout of your records*. The *Print option* is symbolized as Printer icon.
- **Export:** Allows you to *move your information from our software into your favorite .CSV viewer/editor*. The *Export option* is symbolized as Export icon.
- **Edit:** Allows you to *edit* the specific line item. The *Edit option* is symbolized as Notepad icon under the Actions column.
- **Delete:** Allows you to *delete* the specific line item. The *Delete option* is symbolized as X icon under the Actions column.

Within each tab all your corresponding records will be displayed. For example, inside your Vendor's detail page, you will find all your Purchase Orders related to that specific Vendor. To select an individual record, simply click on that records name and that specific record will open.

- To *create a new record* within the tabs, click on **+ New** or **+Add** icon and fill in the required fields. After filling out the new record, press the Save icon. (The **+New** or **+Add** icon will display on selected tabs)
- To *change the order* of the tab's list, click on the Column header. Clicking on the header once will put your tab in descending order,

while clicking on it a second time will organize your tab in ascending order.

OrderTime

Home Sales Purchasing Production Warehouse Reports

Purchasing > Vendors > Vendor

1800 Got Junk SE Florida

General: Company 1800 Got Junk SE Florida, Primary Contact Mr Ian Benoitel Sr

Bill Address: 1800 GOT JUNK SE FLORIDA, 4436 FOX RIDGE DR, STE 2, FAB, HOLLYWOOD, FL 33021, USA

Other: Terms Consignment, Type Service Providers

Note

Purchase Orders Receivers>Returns Addresses Attachments Custom Open Activities Activity History Items

NO.	DATE	PROMISE DATE	TOTAL AMOUNT	STATUS	ACTIONS
9050	6/30/2017	6/30/2017	50.00	Processing	📄 ⚙️
9049	6/29/2017	6/29/2017	0.00	Processing	📄 ⚙️
10057194	11/9/2016	11/9/2016	0.00	Approved	📄 ⚙️
10057069	7/18/2016	7/18/2016	0.00	Processing	📄 ⚙️
10057040	6/13/2016	6/13/2016	83.55	Processing	📄 ⚙️
10057033	6/2/2016	6/2/2016	0.00	Processing	📄 ⚙️

New PurchaseOrder

On the **Addresses** Tab below, the user has the option to +Add information to this record:

Addresses Quotes Contacts Attachments Custom Open Activities Activity History

Add

NAME	STREET	CITY	STATE/PROV./REG.	CONTACT	EMAIL	PHONE	ACTIONS
Baltimore Warehouse	11280 NW	Baltimore	MD				📄 ⚙️
Primary	22232 SW	New York	NY	John Smith	JohnSmith@Gmail.com	(305)555-5555	📄 ⚙️

Under the **Open Activities** tab, the user has the option to add an event or add a task:

Addresses Quotes Contacts Attachments Custom Open Activities Activity History

Add Event Add Task

ACTIVITY TYPE	SUBJECT	DUE DATE	DESCRIPTION	ASSIGNED TO	ACTIONS
Call	do that	9/21/2016 10:00 AM		James Dadoon	📄 ⚙️