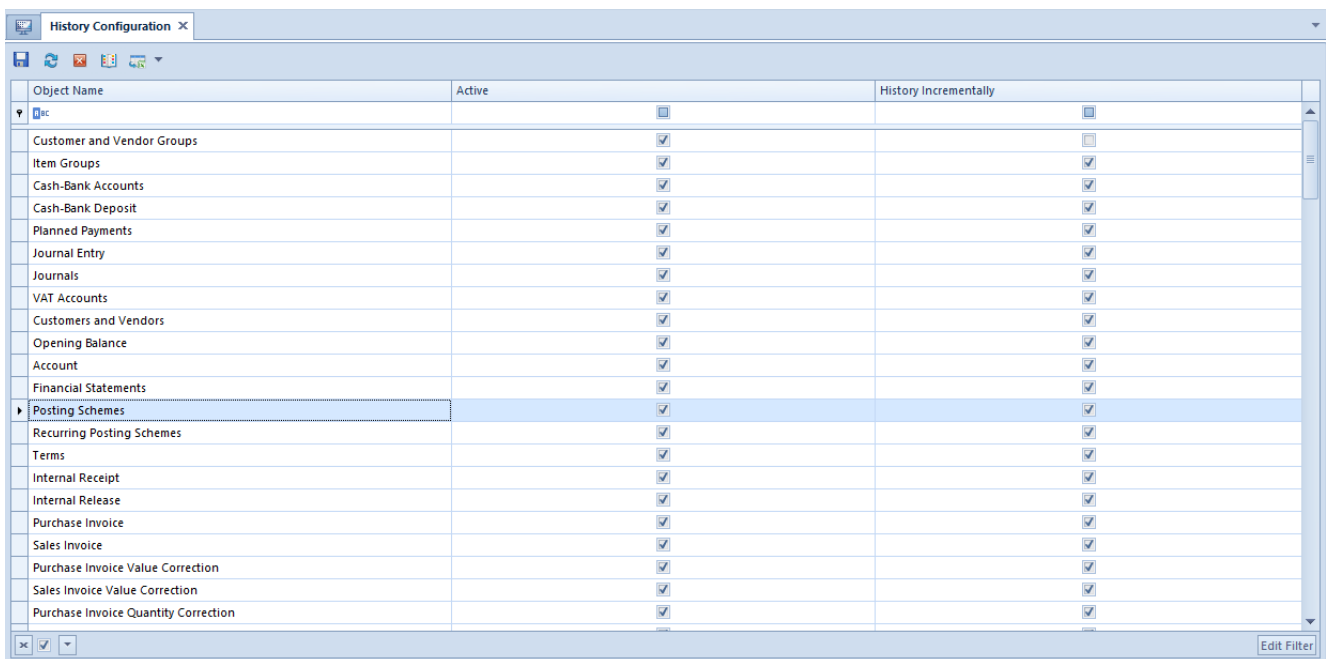


# History

The functionality of *History* allows for remembering information regarding changes of data made by the user, e.g., confirmation or posting of documents, adding or editing objects etc.

## History configuration



Object Name	Active	History Incrementally
Customer and Vendor Groups	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Item Groups	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cash-Bank Accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cash-Bank Deposit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Planned Payments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Journal Entry	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Journals	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
VAT Accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Customers and Vendors	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Opening Balance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Financial Statements	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Posting Schemes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Recurring Posting Schemes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Terms	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Internal Receipt	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Internal Release	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Purchase Invoice	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sales Invoice	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Purchase Invoice Value Correction	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sales Invoice Value Correction	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Purchase Invoice Quantity Correction	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

### History configuration

History configuration is available from the level of *Configuration* → *History* → *Configuration*. *History Configuration* list is composed of the following columns:

- **Object Name** – type of object for which it is possible to handle changes history
- **Active** – parameter deciding whether changes for a given object should be remembered
- **History Incrementally** – if the parameter is checked, changes regarding an object are remembered incrementally. Unchecking that parameter in the column causes that only simple history is remembered by the system, e.g., addition, confirmation or deletion of a

document.

Information remembered after checking the parameter *History Incrementally*:

- **Addition**
- **Saving of changes**
- **Automatic recording of modifications**
- **Confirmation**
- **Quantity confirmation**
- **Deletion**
- **Cancelation**
- **Payment**
- **Single-sided entries**
- **Posting with scheme**
- **Manual posting**
- **Printing**
- **Adding/Import (e.g., bookkeeping account)**
- **Opening**
- **Closing**
- **Submitting of a document**
- **EDI export**
- **Printing on receipt printer**
- **Addition/modification and deletion of attribute**
- **Addition/modification and confirmation of analytical description**
- **Addition/modification and deletion of attachment**
- **Addition/modification and deletion of additional cost**
- **Activation/deactivation of a price list**
- **Addition/modification and deletion of the prices of specific items from the price list**

## **Changes history**

Identifier	Text Identifier	Operation Name	Operation Date	Object Name	Description
2	R/2021/00001	Addition	30/04/2021 18:46:34	Receipt	
2	R/2021/00001	Automatic Recording of Modificatio...	30/04/2021 18:46:42	Receipt	
2	R/2021/00001	Saving	30/04/2021 18:46:50	Receipt	
2	R/2021/00001	Payment	30/04/2021 18:47:00	Receipt	
2	R/2021/00001	Automatic Recording of Modificatio...	30/04/2021 18:47:00	Receipt	
2	R/2021/00001	Confirmation	30/04/2021 18:47:01	Receipt	

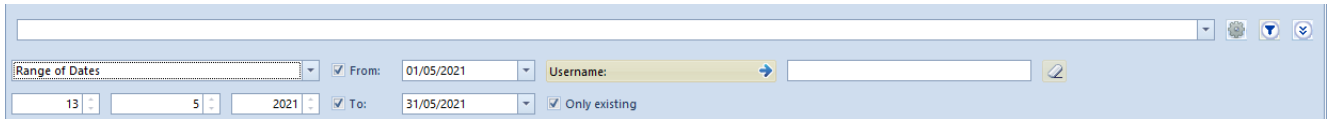
## Window of changes history of object Receipt

To open changes history of a given object, it is necessary to mark appropriate item in the *History Configuration* and double click on it or select button [**Changes History**] available in the main menu. A list of all changes applied on the object is opened and each of them is marked with an appropriate text identifier. Double clicking on an item or clicking on the arrow placed next to it displays the following details regarding introduced change:

- **Identifier**– change numeric identifier
- **Text Identifier** – text identifier of the object to which the change applies
- **Operation Name** – sort of entered change
- **User Name** – user who entered the change
- **Operation Date** – date of entering the change
- **Object Name** – type of object affected by the change
- **Description** – additional information regarding entered change

Additionally, on the form of each object (e.g., document, item, customer/vendor etc.) there is tab *Change History*, where the history of operations in which a given object was involved, is available.

## Filtering



## History filter

The history of changes is provided with a filter allowing for filtering the list by specific interval of time and user name. Parameter *Only existing* is checked by default and its unchecking causes that also changes regarding objects deleted from the system are displayed on the list.

The functionality *Text Identifier* available above the changes history allows for adapting of the filter by the user.

Detailed description of functioning of the filters can be found in category <<Searching and filtering data>>