Frequently Asked Questions (FAQ)

<u>Q: How do I filter the Customer/Vendor list?</u>

1. Click the Filter icon in the right-hand side of the search bar to display the Filter dialog box.

٩	Search Customer Name o	r Numbel	≡
cation Dat	e Business Rep	Filter	Division

2. Click one or more of the drop-down menus and select the factors that will narrow down your list. Click on **Apply Filter(s)** to save.

# Test Documents Received Filter Cu	ustomers		×
Business	er Name	value	
Business Rep	o hane		
Client Type		Clear Filter(s)	
Customer Name		+ ADD ROW	
Customer Number			CANCEL APPLY FILTER(S)
Division			
Implementer			
Inside Sales			
Last Test Document Date	Filter by status to is	olate Production cu	stomers/
Modification Date	· · · · · · · · · · · · · · · · · · ·	olute i roudetion ed	Scomers
Production Configuration Complete Date	vendors.		
Status			
	Customers	@	CUSTOMER OPTIONS
	Customers	(+) ADD	CUSTOMER OPTIONS
• The filters will remain		Q Search Customer Name or	Number 荘 📃 🕁
until you clear them,	STATUS = PRODUCTION		
	STATUS = PRODUCTION		
allowing you to move			
between screens with t	he filter(s) in place		
between screens with t	ne meer(3) m place.		
Close a filter to clear it f	from your view		
	nom your view.		
Close a filter to clear it i			

Q: What is a Duplicate document?

DUPLICATE

A: Conexiom will automatically mark a document as a duplicate* if there is an existing document with the same identifier (for example, two documents with PO# 1234).

ALERTS

PRODUCTION DOCUMENTS

1 document(s) selected

AH00003.xerp

document.xls>

REQUEST CHANG

PROCESS

body.html body.txt document.em

LINK(S)

- Duplicates are flagged and are not processed automatically.
- If a duplicate needs to be delivered to the ERP, you will need to reprocess it.

To reprocess:

- Search for the duplicate document in the document section of the Customer/ Vendor Details page and select it from the list
- 2. Click Process

If you need Conexiom to always process documents with duplicate numbers for a certain customer or vendor, this can be requested as a setting through a change request.

> *For more information on document statuses, see "Document Statuses" QRC.

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