BMS Interface

AYUDA

Action Bar

Action buttons switch between features inside the connectors and peform actions such as save refresh and export data to MS-Excel.

The action buttons differ depending on context.

Options

Filters can be saved and reused.

Click Option to save searches used frequently. You can name your saved filters and even set them as defaults.

Filters

These are the primary tool inside BMS connectors to locate the records to be edited. The filters are contextual and change based upon the location and task but function similarly.

Sort

Columns can be sorted.

Search results

The results of filter searches are shown in the upper right hand pane. Click a row to show its details below.

Record Editor

Drill into an edit the billing records that contribute to invoices.

Approval Status

Approved   Generated   Invoice Number