

# Most Recent Activity

## Overview

The **Most Recent Activity** allows you to track the most recent activity for **Customers, Items, Opportunities, Sales, and Services** with 1-click using the newly added **Recent Activity** tabs found under their corresponding menu. In addition, **Recent Activity** can also be tracked using the **Dashboards** feature with **new actionable Recent Activity** tiles.

Each tab is limited to the **20 most recent** changes, with **one line per Associate** and **one line per Item** change to maximize the space for most relevant changes. For example, if you update the price of **one Item** with the **same Vendor Style Number** 5 times, only **ONE** record of the most recent change will appear under **Recent Activity** to maximize the space.



Please note that this will **ONLY** display the most recent activity from the **date of update** and forward. There is **no backdating** with this feature, meaning any activity **prior** to upgrading to 24.2 will **NOT** show under **Recent Activity**.

## Accessing Most Recent Activity

**Most Recent Activity** can be accessed throughout the Edge in the following locations listed below. For your convenience, each record that appears under **Recent Activity** can be worked **directly** from the **Recent Activity** tab.

For **example**, you can double click on a **Customer Record** that appears in **Recent Activity** and make any additional **notes** or **corrections** needed after your customer leaves your store.

### ➤ Customer > Recent Activity

ID #	Last Name	First Name	Spouse/Partner Last	Spouse/Partner First	Phone	Phone #	Email	Email Address	Address	Company	Street	City	State	ZIP	Social Type	Social Address	Entered
001-00334								joanward@ed.com	DEFAULT					43512			8/8/2002
001-00578									DEFAULT					43512			9/25/2002
001-00806					WORK				DEFAULT					43512			11/6/2002
001-01216					HOME				DEFAULT					38825			12/19/2002
001-01392					HOME				DEFAULT					43556			1/9/2003
001-01540					HOME				Home					45879			2/12/2003
001-01788					HOME				DEFAULT					43512			4/7/2003
001-01909					WEEKEND				DEFAULT					43512			4/29/2003
001-02027					HOME				home					43512			5/29/2003
001-02214					HOME												7/10/2003
001-02362									DEFAULT					45383			8/19/2003
001-02865					HOME				DEFAULT					43512			1/1/1980
001-03163									DEFAULT					43512			2/18/2004
001-03201					HOME				WORK					43545			2/28/2004
001-03494					WEEKEND				DEFAULT					43512			5/18/2004
001-04099					HOME				DEFAULT					43512			12/7/2004
001-04900					HOME				HOME					43512			7/30/2005
001-05996									HOME					43527			7/26/2006
001-06660					NIGHTS				HOME					43512			2/3/2007
001-17918					Cell				Home					06770			10/15/2024
001-17919					Cell				Home					06770			10/15/2024
001-17920					Cell				Home					06770			10/15/2024
001-17921																	10/15/2024
001-17922					CELL				WORK					06484			10/15/2024

Customer > Sales > Recent Activity

The Edge® - [20 sales]

File Administrative Window Help

POS	Customer	Clientele	Inventory	Services	Reports	Dashboards	Associate	Calendar	News
Date	Sale #	Customer	Total	Goods	Services	Other	Tender		
10/16/2024 1:49 PM	001-131531		\$0.00	\$0.00	\$0.00	\$0.00	\$5,229.00		
10/16/2024 1:36 PM	001-131530		\$94.34	\$89.00	\$0.00	\$0.00	\$94.34		
10/16/2024 1:34 PM	001-131529		\$94.34	\$89.00	\$0.00	\$0.00	\$390.84		
10/16/2024 1:23 PM	001-131528		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		
10/16/2024 12:51 PM	001-131527		\$122.35	\$0.00	\$115.00	\$0.00	\$72.35		
10/16/2024 12:49 PM	001-131526		\$0.00	\$0.00	\$0.00	\$0.00	\$50.00		
10/16/2024 12:46 PM	001-131525		\$206.85	\$0.00	\$195.00	\$0.00	\$156.85		
10/16/2024 12:41 PM	001-131524		\$0.00	\$0.00	\$0.00	\$0.00	\$50.00		
10/16/2024 11:06 AM	001-131523		\$1,000.00	\$1,000.00	\$0.00	\$0.00	\$510.00		
10/16/2024 11:05 AM	001-131522		\$133.00	\$0.00	\$0.00	\$10.00	\$323.00		
10/16/2024 9:49 AM	001-131521		\$72.08	\$68.00	\$0.00	\$0.00	\$55.08		
10/16/2024 9:48 AM	001-131520		\$0.00	\$0.00	\$0.00	\$0.00	\$17.00		
10/16/2024 9:44 AM	001-131519		\$68.00	\$68.00	\$0.00	\$0.00	\$52.00		
10/16/2024 9:42 AM	001-131518		\$1.00	\$0.00	\$0.00	\$0.00	\$17.00		
10/16/2024 9:01 AM	001-131517		\$106.00	\$100.00	\$0.00	\$0.00	\$81.00		
10/16/2024 8:56 AM	001-131516		\$0.00	\$0.00	\$0.00	\$0.00	\$25.00		
10/16/2024 8:42 AM	001-131515		\$101.40	\$100.00	\$0.00	\$0.00	\$51.00		
10/16/2024 8:40 AM	001-131514		\$0.00	\$0.00	\$0.00	\$0.00	\$20.40		
10/15/2024 2:42 PM	001-131513		\$0.00	\$0.00	\$0.00	\$0.00	\$50.00		
10/15/2024 2:41 PM	001-131512		\$135.68	\$128.00	\$0.00	\$0.00	\$135.68		

Clientele > Opportunity > Recent Activity

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File Administrative Window Help

POS	Customer	Clientele	Inventory	Services	Reports	Dashboards	Associate	Calendar	News
Customer	Store	Date Entered	Stage	Result	Date Closed	Last Activity	Associate	Est Value	Title
Fake Customer	Store 1	10/21/2024	New Opportunity			10/21/2024	Clark Manager	\$150.00	Wedding Bands
Testing Cut	Store 1	10/21/2024	Negotiating			10/21/2024	Clark Manager	\$900.00	Birthday Gift

Inventory > Recent Activity

The Edge® - [Items - 19]

File Administrative Window Help

POS	Customer	Clientele	Inventory	Services	Reports	Dashboards	Associate	Calendar	News											
Item #	Qty #	Real	Current	Stock	Serial Date	Type	Material	Color	Stock	Weight	Location	Price Method	Qty	Entered	Vendor	Vendor Style	Style Note	Invoice #	Description	
001-100-00016	1	\$2,112.00	\$1,156.00	In Stock	10/02/24	Stock	14kt	White	Polished	6.5			10/02/24	05	CR1503			25519	Lady's Hand Tone 14 Karat Prong Set Engagement Ring Size 6.5 With 0.30ct Round G	
001-100-00017	1	\$2,175.00	\$1,337.50	In Stock	10/02/24	Stock	14kt	White	Polished	6.5			10/02/24	06	ER011718RDW4LJ CSD4	579610-1	"Shanna"	31828	Lady's White 14 Karat Halo Design Engagement Ring Size 6.5 With One 0.30ct Round G	
001-100-00018	1	\$1,995.00	\$997.50	In Stock	10/02/24	Stock	14kt	White	Polished	7			11/02/24	06	10029-35			34023	Lady's White Gold Diamond Stone Engagement Ring with One 2.01ct H-I Round Center	
001-100-00019	1	\$1,695.00	\$1,695.00	In Stock	2/10/24	Stock	14kt	White	Polished	6.5			2/10/24	05	CR0413			27412	Lady's 14 Karat White Gold Three Stone Engagement Ring With Two Zirconia Round H-I Di	
001-100-00020	1	\$1,995.00	\$1,995.00	In Stock	3/10/24	Stock	14kt	White	Polished	6.5			2/10/24	05	CT1308			27412	Lady's White 14 Karat Prong Set Engagement Ring Size 6.5 With 0.40ct H-I Round C	
001-100-00021	1	\$2,295.00	\$2,295.00	In Stock	10/24/24	Stock	14kt	T-T	Polished	6.5			7/24/24	05	OC18426			28579	Lady's 14 Karat Two Tone Halo Engagement Ring with One 2.6ct I-I Diamond and 30-	
001-100-00022	1	\$2,395.00	\$2,395.00	In Stock	10/24/24	Stock	14kt	White	Polished	6.5			10/24/24	05	OC12346			28582	Lady's White 14 Karat Micro Pave Design Engagement Ring Size 6.5 With One 0.24ct Pa	
001-100-00023	1	\$25.00	\$25.00	Sold	8/7/2024	Stock							4/9/2024	24	12345			12345	test item details	
001-100-00024	1	\$38.00	\$38.00	In Stock	10/15/2024	Stock							10/15/2024	Arma	release				myf	Lady's engagement ring
001-100-00025	1	\$45.00	\$45.00	In Stock	10/15/2024	Stock							14/10/2024	Arma	release/PC				myf	UPC bulk item
001-100-00026	1	\$3,810.00	\$3,810.00	In Stock	12/8/2018	Stock	18 Karat	Yellow	Polished	8			12/8/2018	AJ	ME0743			23333	LADIES TRK GOLD BRZEL RING WITH 80 CT DIAMOND	
001-100-00027	1	\$45.00	\$45.00	In Stock	10/16/2024	Stock							10/16/2024	Arma	armorcenterlogo				and@rshd	Armorcenter logo item
001-100-00028	1	\$45.00	\$45.00	In Stock	10/16/2024	Stock							10/16/2024	Arma	armorcenterlogo				and@rshd	Armorcenter logo item
001-100-00029	1	\$45.00	\$45.00	In Stock	10/16/2024	Stock							10/16/2024	Arma	armorcenterlogo				and@rshd	Armorcenter logo item
001-100-00030	1	\$3,900.00	\$3,900.00	In Stock	10/16/2024	S/O	14 Karat	White	Polished				10/16/2024	AJ	ME107376				john	LADIES 14KT TWO TONE GOLD ENGAGEMENT RING WITH .80CT CENTER DIAMOND
001-095-00000	1	\$85.00	\$85.00	In Stock	7/15/2024	Stock	14 Karat	Yellow	Polished				7/15/2024	FFP	9785-03				28953	14K GOLD 14kt TRK AQUAMARINE
001-000-00178	1	\$12.00	\$12.00	In Stock	10/15/2024	Stock							10/15/2024	AZ	Release/OM				drifan	UPC bulk item
001-000-00180	1	\$12.00	\$12.00	In Stock	10/15/2024	Stock							10/15/2024	AG	release/measure				drivv	Measure Bulk item
001-001-00001	1	\$0.00	\$0.00	In Stock	10/15/2024	Stock	24 Karat						10/15/2024	24	SP02	100 Grams			9181	24K Gold pure metal

Services > Recent Activity > Job

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File Administrative Window Help

POS	Customer	Clientele	Inventory	Services	Reports	Dashboards	Associate	Calendar	News															
Job #	Type	Envelope #	Customer	Spouse/Partner	Phone	Entered	Digital ETA	Current ETA	Expires	Done	Picked Up	Cancel Date	Location	Notified By	Notify Address	Last Notified Date	Description	Condition	Make Associate	Estimated	Approved On	Adjusted	Adjusted	
001-131523-001	R	001-131523-001				10/15/2024	10/22/2024	10/22/2024	10/15/2024					Safe		10/15/2024 2:41 PM	repair #							
001-131523-002	C	001-131523-002				10/15/2024	10/22/2024	10/22/2024	10/15/2024					Phone		10/15/2024 2:28 PM	repair #							
001-131524-001	R	001-131524-001				10/16/2024	10/23/2024	10/23/2024	10/16/2024					Phone		10/16/2024	repair #							
001-131525-001	R	001-131525-001				10/16/2024	10/23/2024	10/23/2024	10/16/2024					Phone		10/16/2024	repair #							
001-131526-001	R	001-131526-001				10/16/2024	10/23/2024	10/23/2024	10/16/2024					Phone		10/16/2024	repair #							
001-131527-001	R	001-131527-001				10/16/2024	10/23/2024	10/23/2024	10/16/2024					Phone		10/16/2024	repair #							

➤ Services > Recent Activity > Special Order

Special Order #	Location	Customer	Phone	Entered	ETA	PO #	Vendor	Style	State	Rate	NR	NTD	Status	Date Received	Description	Price	Deposit	Intake Associate	Notified By	Notify Address	Last Notified	Notes	
001-131529-004		0203-9795200		10/15/2024	10/22/2024	24	SPCA					Y	None Here		Calicut Stone Ring - Women's	\$100.00	\$50.00						
001-131529-004		0203-9795200		10/16/2024	10/22/2024		ADP	8203005				Y	None Here		10' Uniform Strand of 6.6-Strm Freshwater CP	\$543.00	\$271.50						
001-131529-001		0203-955-1155		10/16/2024	10/22/2024		Alex	AS881109PG				Y	None Here		Alex and Amy Bracelet - Gold Feather Ring - Yellow	\$20.00	\$20.00						
001-131529-002		0203-955-1155		10/16/2024	10/26/2024		Alex	CI162072				Y	None Here		Lower Date Enhanced Diamond 2.100 Round H1 Diamond	\$15,400.00	\$5,200.00						

➤ Services > Recent Activity > Appraisal

Appraisal #	Location	Customer	Phone	Entered	Due	Done	Picked Up	Notify	Notify Address	Last Notified	Intake Assoc
001-131513-002				10/15/2024							
001-131529-003				10/16/2024							

## Dashboards

With a series of newly added **Recent Activity** tiles, you and your associates can track all **Most Recent Activity** in one location using the **Dashboards** Feature. As with other **Dashboard List Tiles**, the **Most Recent Activity** tiles are **actionable**, meaning you can click on the **hyperlinks** in each tile to access their corresponding record.



To learn more about creating and managing your Dashboard tiles, visit the [Dashboards](#) section of the EdgeUser knowledgebase for how-to documents and tutorial videos.

Recent Activity (Today (10/16/2024))

Customer #	Date	Associate	Action
001-17922	10/16/2024	1	See Customer
001-06660	10/16/2024	1	See Customer
001-05996	10/16/2024	1	See Customer
001-04400	10/16/2024	1	See Customer

Item #	Date	Associate	Action
001-100-1000058	10/16/2024	1	See Item
001-100-1000017	10/16/2024	1	See Item
001-100-00756	10/16/2024	1	See Item
001-100-00691	10/16/2024	1	See Item

Sale #	Date	Associate	Action
001-131531	10/16/2024	1	See Sale
001-131530	10/16/2024	1	See Sale
001-131529	10/16/2024	1	See Sale
001-131528	10/16/2024	1	See Sale

Job #	Date	Associate	Action
001-131529-002	10/16/2024	1	See Job
001-131528-001	10/16/2024	1	See Job
001-131526-001	10/16/2024	1	See Job
001-131524-001	10/16/2024	1	See Job

Appraisal #	Date	Associate	Action
001-131529-0103	10/16/2024	1	See Appraisal

Sp Order #	Date	Associate	Action
001-131531-01	10/16/2024	1	See Special Order
001-131531-02	10/16/2024	1	See Special Order
001-131529-01	10/16/2024	1	See Special Order

Opportunity #	Date	Associate	Action
241016-1344	10/16/2024	1	See Opportunity
01-01-99-290161			
241016-1342	10/16/2024	1	See Opportunity
58-01-99-290157			