

Customer Contact History Report

Introduction

A new **Customer** report was added called the **Contact History report** that was developed to allow for tracking all changes made to **Customer contacts methods**. You can track changes for all contact methods or use the Contact History Type dropdown filter to narrow down your selections to **Phone, Addresses, Social**, and more. No more wondering which of your **Associates** updated details for a **Customer's Address** and when, as this report not only allows you to track the changes but also who made the changes and sort the report by **Associate** as well. Using the **same Customer filter** as other **Customer** reports, you can also search by a **specific Customer** or **group of Customers**, as desired.

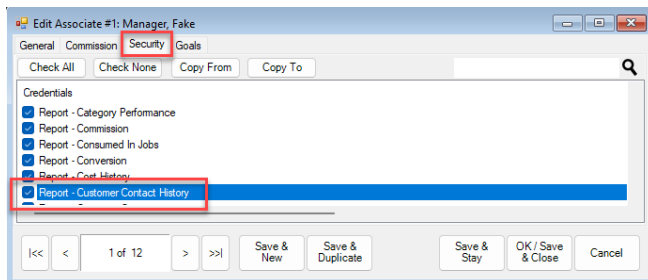


There is **NO historical data** stored in this report at the time of release. This report will **ONLY** show data **going forward** from the release, meaning **no data prior** will appear.

Running the Customer Contact History Report

As with other reports, you must make sure you have the appropriate **permission** set prior to running it otherwise Edge will alert you with a **pop-up** letting you know you do not have permission to run the report.

Visit the **Security** tab on the **Associate** record who should have permission to run this report, and either search or scroll until you find the **Customer Contact History Report** permission.



To run the **Customer Contact History Report**:

1. Navigate to **Reports > Customers > Contact History**. The **Customer Contact History Report** window to open.

2. Enter any **report criteria** as desired, then select how you would like your results to be grouped by checking the desired boxes in the **Group/Sort By** field.
3. Click **OK** to generate your report.

Customer Contact History Report

10/30/2025
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Customer	Description	Date Modified
Associate: Michael		
(001-00036)	New Phone: (203) Added by (22) Michael	10/30/2025
(001-00036)	New Address: 3 Corp Ave	10/30/2025
(001-00035)	New Phone: (203) Added by (22) Michael	10/30/2025
(001-00035)	New Address: 301 SW 1st Ave	10/30/2025
, Joe (001-00037)	New Phone: (203) Added by (22) Michael	10/30/2025
, Joe (001-00037)	New Address: 3 Corporate Ave	10/30/2025
Tst, (001-00038)	New Phone: (203) Added by (22) Michael	10/30/2025
Tst, (001-00038)	New Email: @ajslic.com Added by (22) Michael	10/30/2025
Tst, (001-00038)	New Address: 3 Corporate Dr	10/30/2025
Grand Total:9		