Asking (Row 0): How are access rights for Fishbowl Reports assigned to users?

response for row 0

Query: How are access rights for Fishbowl Reports assigned to users?

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REFERENCE #0

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Content:

url heading content images https:// help.fishbowlinventory.com/ advanced/s/Access-RightsContents [] https://

help.fishbowlinventory.com/ advanced/s/Access-RightsAccounting Integration[] https:// help.fishbowlinventory.com/

advanced/s/Access-RightsAvalara [] https:// help.fishbowlinventory.com/ advanced/s/Access-RightsBI Editor [] https://

help.fishbowlinventory.com/ advanced/s/Access-RightsBI Report [] https:// help.fishbowlinventory.com/ advanced/s/Access-

RightsBill of Materials[] https:// help.fishbowlinventory.com/ advanced/s/Access-RightsCalendar [] https://

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advanced/s/Access-RightsFishbowl Anywhere[] https:// help.fishbowlinventory.com/ advanced/s/Access-RightsFishbowl

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advanced/s/Access-RightsForecast [] https:// help.fishbowlinventory.com/ advanced/s/Access-RightsHome [] https://

help.fishbowlinventory.com/ advanced/s/Access-RightsImports / Export[] https:// help.fishbowlinventory.com/

advanced/s/Access-RightsInventory [] https:// help.fishbowlinventory.com/ advanced/s/Access-RightsLocation [] https://

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https:// help.fishbowlinventory.com/ advanced/s/Access-RightsPicking [] https:// help.fishbowlinventory.com/

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advanced/s/Access-RightsVendor [] https:// help.fishbowlinventory.com/ advanced/s/Access-RightsWork OrderAccess to

Fishbowl Reports can be assigned on the Report Rights tab of the User Group module . See Included reports for a list and

description of Fishbowl reports.[]

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Fishbowl Reports can be assigned on the Report Rights tab of the User Group module . See Included reports for a list and

description of Fishbowl reports.[]

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Response: Access to Fishbowl Reports can be assigned on the Report Rights tab of the User Group module.

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Asking (Row 1): Where can I find a list and description of included Fishbowl reports?

response for row 1

Query: Where can I find a list and description of included Fishbowl reports?

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Content:

url heading content images https:// help.fishbowlinventory.com/ advanced/s/Reports\nThe Reports module, located in the

Reporting group , organizes over 150 reports. In addition to many included reports , Fishbowl also offers custom reports

and reports from the Fishbowl Store .[] https:// help.fishbowlinventory.com/ advanced/s/ReportsContents [] https://

help.fishbowlinventory.com/ advanced/s/ReportsModule buttonsUpload allows a report file to be uploaded .\nUpdate allows

an existing report to be re- uploaded .\nSave will save any changes made to the report. \nDelete will delete the report

if it is not read-only. \nDuplicate creates a copy of the report that can be renamed and modified.\nRequest opens a

window to request a custom report from Fishbowl .\nServer Log opens a window with technical information about recent

server activity. This information can then be sent to Fishbowl .\nEmail opens a window to compose an email. If the

module's default report is specified, the PDF report will be attached. Email can be configured on the Email tab of the

Settings module .\nPrint sends the default module report to the printer.\nHow To opens this article in a web

browser.\nRefresh reloads whatever is currently open in the module.[] https:// help.fishbowlinventory.com/

advanced/s/ReportsModule associationsWhen a report is associated with a module, the report will appear in the Reports

menu when the module is open. Below are the steps to associate a report with a module.\nThe report will now appear in

the Reports menu when the associated module is open. Selecting the report from the menu will open the report. Selecting

Reports Module from[]url heading content images the menu will open the Reports module .\n https://

help.fishbowlinventory.com/ advanced/s/ReportsDefault module reportEach module also has a default report. The default

report is printed when clicking the Print button or selecting Print/Print Preview from the File menu. Below are the

steps to set a default report for a module.[] https:// help.fishbowlinventory.com/ advanced/s/ReportsDefault printerIf

system printing is disabled, the default printer for each report can be set per location group. When a user prints a

report, Fishbowl will look at that user's default location group and select the printer specified for that report and

location group. \n\nIn the scenario shown above, Fishbowl looks at that user's default location group and selects the

printer specified for that report and location group. For any print job, the user can change the selected printer before

actually sending the print command.[] https:// help.fishbowlinventory.com/ advanced/s/ReportsSystem printingSystem

printing can be enabled by clicking the Tools menu, selecting Program Options , and then clicking the General tab. If

Use System Printing is selected, the operating system's default printer will be selected in the printer dialog instead

of the default location group printer .\n\nIn the scenario shown above, a warning is displayed to let the user know that

the Windows default printer will be selected. For any print job, the user can change the selected printer before

actually sending the print command.[] https:// help.fishbowlinventory.com/ advanced/s/ReportsModify report

filtersReports in Fishbowl can be easily modified by using the report filters. Filters are[]url heading content images

options that control what the report displays such as date ranges, checkboxes, hide/show columns, etc.\n\nFollow the

steps below to modify report filters.\nSaving report filters changes the default for all Fishbowl users. Users can

customize their own filters by first adding the report to their favorites . Below is a description of the buttons found

at the bottom of the Modify Report window. https:// help.fishbowlinventory.com/ advanced/s/ReportsDuplicate a

reportReports can be duplicated, placed in new folders , and renamed. There are several ways to make a duplicate copy of

a report.\nA duplicated report can be modified independently of the original report.[] https://

help.fishbowlinventory.com/ advanced/s/ReportsCreate a new folderNew folders can be created in the Reports module.

Follow the steps below to create a new report folder.\nDefault folders or reports cannot be deleted. However, user-

created folders, as well as any duplicated reports or custom reports can be deleted by right-clicking the item and

selecting Delete .[] https:// help.fishbowlinventory.com/ advanced/s/ReportsCustom reportsTraining Videos for custom

reports can be found here . If modifying the filters of an existing report is not sufficient, a custom report can be

requested.\nThe custom report will now appear on the Search tab, with all of the other reports in the selected

folder.\nIn addition, Fishbowl sells pre-built reports in the Fishbowl Store . It is also possible to create or modify

reports using a program called iReport . Fishbowl does not offer support for using iReport, but does provide some

initial setup help. Please see[]url heading content images iReport and iReport FAQs for more information. https://

help.fishbowlinventory.com/ advanced/s/ReportsUpload a reportWhen a report is purchased from the Fishbowl Store , or

created in iReport , the report files need to be uploaded to the Fishbowl Server. These steps are not required for

custom reports from Fishbowl . Follow the steps below to upload a report to the Fishbowl Server.\nNOTE: If a report

requires subreports, the main report should be uploaded using the above instructions. The subreport files should be

manually pasted into the Fishbowl\server\reports\Custom folder on the Fishbowl Server computer.\n[] https://

help.fishbowlinventory.com/ advanced/s/ReportsUpdate a reportFollow the steps below to update a report that has already

been uploaded.[] https:// help.fishbowlinventory.com/ advanced/s/ReportsServer logThe Server Log button on the Reports

module toolbar shows the recent activity of the server, including any errors. The buttons in the window allow the data

to be refreshed, copied, or sent to Fishbowl.\n\nThe report queries are stored in a separate file and can be viewed on

the Reports tab. \n\nSome aspects of the Reports module can be customized by opening the module, clicking the Tools

menu, and then selecting Module Options .\nNOTE: The formatting of numbers in reports (price, cost, quantity, and date)

can be customized even more in the Property module .\nBelow is a list of the reports included with Fishbowl. In addition

to many included reports , Fishbowl also offers custom reports and reports from the[]url heading content images Fishbowl

Store . Click the report title to see more details, or click an image to see a larger screenshot of the report.\n

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Response: Based on the provided context, the section under the heading "Server log" (URL:

`<https://help.fishbowlinventory.com/advanced/s/ReportsServer> log`) states: "Below is a list of the reports included with

Fishbowl... Click the report title to see more details...". Therefore, you can find a list of included Fishbowl reports

below the content on that specific help page, and clicking on a report title will provide more details or a description.

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Asking (Row 2): Which module is used to assign access rights to users other than the admin for the Data module?

response for row 2

Query: Which module is used to assign access rights to users other than the admin for the Data module?

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advanced/s/Access-RightsPlugin [] https:// help.fishbowlinventory.com/ advanced/s/Access-RightsPricing Rule[] https://

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RightsProperty [] https:// help.fishbowlinventory.com/ advanced/s/Access-RightsPurchase Order[] https://

help.fishbowlinventory.com/ advanced/s/Access-RightsReceiving [] https:// help.fishbowlinventory.com/ advanced/s/Access-

RightsReports [] https:// help.fishbowlinventory.com/ advanced/s/Access-RightsRMA [] https://

help.fishbowlinventory.com/ advanced/s/Access-RightsSales Data [] https:// help.fishbowlinventory.com/

advanced/s/Access-RightsSales Order [] https:// help.fishbowlinventory.com/ advanced/s/Access-RightsSchedule []url

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RightsShipStation [] https:// help.fishbowlinventory.com/ advanced/s/Access-RightsTax Rate [] https://

help.fishbowlinventory.com/ advanced/s/Access-RightsTransfer Order[] https:// help.fishbowlinventory.com/

advanced/s/Access-RightsUOM [] https:// help.fishbowlinventory.com/ advanced/s/Access-RightsUser [] https://

help.fishbowlinventory.com/ advanced/s/Access-RightsUser Group [] https:// help.fishbowlinventory.com/

advanced/s/Access-RightsVendor [] https:// help.fishbowlinventory.com/ advanced/s/Access-RightsWork OrderAccess to

Fishbowl Reports can be assigned on the Report Rights tab of the User Group module . See Included reports for a list and

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Content:

url heading content images https:// help.fishbowlinventory.com/ advanced/s/Access-RightsContents [] https://

help.fishbowlinventory.com/ advanced/s/Access-RightsAccounting Integration[] https:// help.fishbowlinventory.com/

advanced/s/Access-RightsAvalara [] https:// help.fishbowlinventory.com/ advanced/s/Access-RightsBI Editor [] https://

help.fishbowlinventory.com/ advanced/s/Access-RightsBI Report [] https:// help.fishbowlinventory.com/ advanced/s/Access-

RightsBill of Materials[] https:// help.fishbowlinventory.com/ advanced/s/Access-RightsCalendar [] https://

help.fishbowlinventory.com/ advanced/s/Access-RightsCarrier [] https:// help.fishbowlinventory.com/ advanced/s/Access-

RightsFishbowl Checkout[] https:// help.fishbowlinventory.com/ advanced/s/Access-RightsClass [] https://

help.fishbowlinventory.com/ advanced/s/Access-RightsCompany [] https:// help.fishbowlinventory.com/ advanced/s/Access-

RightsConsignment [] https:// help.fishbowlinventory.com/ advanced/s/Access-RightsCurrency [] https://

help.fishbowlinventory.com/ advanced/s/Access-RightsCustom Field[] https:// help.fishbowlinventory.com/

advanced/s/Access-RightsCustomer [] https:// help.fishbowlinventory.com/ advanced/s/Access-RightsDashboard []url heading

content images https:// help.fishbowlinventory.com/ advanced/s/Access-RightsData [] https:// help.fishbowlinventory.com/

advanced/s/Access-RightsData Import [] https:// help.fishbowlinventory.com/ advanced/s/Access-RightsDiscount [] https://

help.fishbowlinventory.com/ advanced/s/Access-RightsFile Storage[] https:// help.fishbowlinventory.com/

advanced/s/Access-RightsFishbowl Anywhere[] https:// help.fishbowlinventory.com/ advanced/s/Access-RightsFishbowl

Advanced Mobile[] https:// help.fishbowlinventory.com/ advanced/s/Access-RightsFishbowl ShipExpress[] https://

help.fishbowlinventory.com/ advanced/s/Access-RightsFishbowl Time[] https:// help.fishbowlinventory.com/

advanced/s/Access-RightsForecast [] https:// help.fishbowlinventory.com/ advanced/s/Access-RightsHome [] https://

help.fishbowlinventory.com/ advanced/s/Access-RightsImports / Export[] https:// help.fishbowlinventory.com/

advanced/s/Access-RightsInventory [] https:// help.fishbowlinventory.com/ advanced/s/Access-RightsLocation [] https://

help.fishbowlinventory.com/ advanced/s/Access-RightsLocation Group[] https:// help.fishbowlinventory.com/

advanced/s/Access-RightsManufacture Order[] https:// help.fishbowlinventory.com/ advanced/s/Access-RightsMonitor []url

heading content images https:// help.fishbowlinventory.com/ advanced/s/Access-RightsPart [] https://

help.fishbowlinventory.com/ advanced/s/Access-RightsPayment Gateway[] https:// help.fishbowlinventory.com/

advanced/s/Access-RightsPayment Terms[] https:// help.fishbowlinventory.com/ advanced/s/Access-RightsPayment Viewer[]

https:// help.fishbowlinventory.com/ advanced/s/Access-RightsPicking [] https:// help.fishbowlinventory.com/

advanced/s/Access-RightsPlugin [] https:// help.fishbowlinventory.com/ advanced/s/Access-RightsPricing Rule[] https://

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Fishbowl Reports can be assigned on the Report Rights tab of the User Group module . See Included reports for a list and

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Response: I cannot determine the answer to that. The provided context mentions that access rights for the \*Reports\* module are

assigned using the \*User Group\* module, but it does not specify which module is used to assign access rights for the

\*Data\* module.

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Asking (Row 3): How can Fishbowl dashboards be customized for individual users?

response for row 3

Query: How can Fishbowl dashboards be customized for individual users?

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Content:

url heading content images https:// help.fishbowlinventory.com/ advanced/s/article/ Customize-FishbowlFishbowl Advanced

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clicking the Tools menu and selecting Module Options . Module options allow the module to be customized. For example,

the Picking module options allow a user to specify how picks are created. The documentation for module options are

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FishbowlProgram optionsIn addition to all of the Module Options , a few Program Options are available by clicking the

Tools menu at the very top of the Fishbowl Client. \nProgram Options are not global. They are specific to each device.

This allows for personal preferences, such as dark mode, which is a darker theme for Fishbowl. \n\nAfter making changes

to the Program Options , click the OK button and then restart the Fishbowl Client.[] https://

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customize the Fishbowl software because they may hold any type of data a company desires. Custom Fields are created for

a specific module and then customized to hold text, a date, quantity, money amount, checkbox, list,[]url heading content

images etc.\nFor example, a company may be in the clothing business. Aside from having a specific UOM and part

description, the company decides to use Custom Fields as a way to track Color and Size for items. They create two Lists

with all of the options available for both color and size. When an employee needs to find a shirt with a specific color

and size, they simply use the Advanced Search feature in the Part module to pull all the items within their search

parameters.\nSome companies also use Custom Fields to allow minimum and maximum price parameters. For example, a company

allows their Sales Reps to sell a product at a minimum price of $45 and a maximum price of $50. So the sales rep is

always aware of their limitations, the minimum and maximum prices for each item have beenurl heading content images

established as a Custom Field. \nCustom Fields are for storing data for internal use and are typically not displayed on

reports. Click the Advanced Search button in any search pane to filter based on custom fields. \nSee Custom Field for

additional information on how to create and manage Custom Fields. https:// help.fishbowlinventory.com/

advanced/s/article/ Customize-FishbowlUser groups/ rightsFishbowl allows administrators to give specific rights to their

users. These rights help to give proper visibility of different Fishbowl features. For example, a user may need the

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received or shipped.\nIf, for another example, a company has multiple warehouses, Fishbowl's user groups and rights

allow the company to specify which warehouse an employee has access to. This allows employees to be fixated on the

inventory and processes within their warehouse and not on the inventory within another warehouse or Location

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Fishbowl, all sales orders created need to be issued, picked, packed, and shipped. Some companies may[]url heading

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shipment of the sales order is great enough that the order needs to be moved separately through each module for

organizational purposes. Other companies may desire to pick, pack, and ship the sales order in one swift movement. The

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FishbowlCustomize tablesA table is a column and row layout that is used throughout Fishbowl to display data, such as

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FishbowlSearching tables[] https:// help.fishbowlinventory.com/ advanced/s/article/ Customize-FishbowlRearranging

columns[] https:// help.fishbowlinventory.com/ advanced/s/article/ Customize-FishbowlSort order [] https://

help.fishbowlinventory.com/ advanced/s/article/ Customize-FishbowlColumn visibility[] https://

help.fishbowlinventory.com/ advanced/s/article/ Customize-FishbowlResize columns[] https:// help.fishbowlinventory.com/

advanced/s/article/ Customize-FishbowlSearch pane records[] https:// help.fishbowlinventory.com/ advanced/s/article/

Customize-FishbowlReset layout [] https:// help.fishbowlinventory.com/ advanced/s/article/ Customize-FishbowlInformation

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Content:

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advanced/s/article/ Customize-FishbowlSearch pane records[] https:// help.fishbowlinventory.com/ advanced/s/article/

Customize-FishbowlReset layout [] https:// help.fishbowlinventory.com/ advanced/s/article/ Customize-FishbowlInformation

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Response: Based on the provided context, Fishbowl can save a customized dashboard for each user account on the computer. This

allows every user to see the orders and information that is most relevant to them.

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Asking (Row 4): What is the purpose of the User Group module regarding access rights?

response for row 4

Query: What is the purpose of the User Group module regarding access rights?

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Content:

url heading content images https:// help.fishbowlinventory.com/ advanced/s/article/User- GroupFishbowl Advanced - User

Group[] https:// help.fishbowlinventory.com/ advanced/s/article/User- GroupDec 17, 2024Knowledge[] https://

help.fishbowlinventory.com/ advanced/s/article/User- GroupArticle DetailsThe User Group module, located in the Setup

group , allows each company to customize access rights by limiting the features, reports, and information users have

access to. Users can be assigned to one or more groups, meaning a user will have access to the combined rights of all

the groups they belong to. Fishbowl includes example user groups, but every company is different, so carefully review

the access rights and make changes where necessary.[] https:// help.fishbowlinventory.com/ advanced/s/article/User-

GroupContents [] https:// help.fishbowlinventory.com/ advanced/s/article/User- GroupCreate a new user groupFollow the

steps below to create a user group.[] https:// help.fishbowlinventory.com/ advanced/s/article/User- GroupAssign access

rightsFishbowl utilizes access rights to limit the modules and functions[]url heading content images that a user has

access to. Users will only see the icons for the modules they have rights to access. Access rights are set at the User

Group level, meaning a user's rights are determined by which user groups the user is a member of. Follow the steps below

to assign access rights.\nAccess to Fishbowl reports can be assigned on the Report Rights tab in the User Group module .

See Included reports for a list and description of Fishbowl reports. https:// help.fishbowlinventory.com/

advanced/s/article/User- GroupList of access rightsSee Access Rights for a list and description of all user access

rights in Fishbowl.[] https:// help.fishbowlinventory.com/ advanced/s/article/User- GroupAdmin only rightsNearly all

rights can be granted through access rights. However, the following functions can only be performed by the admin user.[]

https:// help.fishbowlinventory.com/ advanced/s/article/User- GroupAssign users to a groupFollow the steps below to

assign users to a group. \nThe General tab provides the ability to rename a group and assign users to a[]url heading

content images group .\nThe Rights tab provides the ability to assign access rights . For a complete list of access

rights, see Access Rights . \nUsers can view and edit the BI Reports that are selected on the BI Reports tab of their

user groups.\nUsers can view the Reports that are selected on the Report Rights tab of their user groups.\nThe Memo tab

allows for memos to be created, saved, and viewed at any time. Memos may be printed by selecting the Print Memo icon.

They may also be created, edited, or deleted by using the corresponding icons located on the component toolbar. https://

help.fishbowlinventory.com/ advanced/s/article/User- GroupInformation []

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access to. Users will only see the icons for the modules they have rights to access. Access rights are set at the User

Group level, meaning a user's rights are determined by which user groups the user is a member of. Follow the steps below

to assign access rights.\nAccess to Fishbowl reports can be assigned on the Report Rights tab in the User Group module .

See Included reports for a list and description of Fishbowl reports. https:// help.fishbowlinventory.com/

advanced/s/article/User- GroupList of access rightsSee Access Rights for a list and description of all user access

rights in Fishbowl.[] https:// help.fishbowlinventory.com/ advanced/s/article/User- GroupAdmin only rightsNearly all

rights can be granted through access rights. However, the following functions can only be performed by the admin user.[]

https:// help.fishbowlinventory.com/ advanced/s/article/User- GroupAssign users to a groupFollow the steps below to

assign users to a group. \nThe General tab provides the ability to rename a group and assign users to a[]url heading

content images group .\nThe Rights tab provides the ability to assign access rights . For a complete list of access

rights, see Access Rights . \nUsers can view and edit the BI Reports that are selected on the BI Reports tab of their

user groups.\nUsers can view the Reports that are selected on the Report Rights tab of their user groups.\nThe Memo tab

allows for memos to be created, saved, and viewed at any time. Memos may be printed by selecting the Print Memo icon.

They may also be created, edited, or deleted by using the corresponding icons located on the component toolbar. https://

help.fishbowlinventory.com/ advanced/s/article/User- GroupInformation []

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Response: The purpose of the User Group module is to allow each company to customize access rights by limiting the features,

reports, and information users have access to. Access rights are set at the User Group level to limit the modules and

functions that a user has access to.

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Asking (Row 5): What are the mandatory fields required when creating a new customer?

response for row 5

Query: What are the mandatory fields required when creating a new customer?

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Content:

url heading content images https:// help.fishbowlinventory.com/ advanced/s/article/CustomerFishbowl Advanced -

Customer[] https:// help.fishbowlinventory.com/ advanced/s/article/CustomerDec 17, 2024Knowledge[] https://

help.fishbowlinventory.com/ advanced/s/article/CustomerArticle DetailsThe Customer module, located in the Sales group ,

allows customer information, including addresses, groups, and details to be added and edited.[] https://

help.fishbowlinventory.com/ advanced/s/article/CustomerContents [] https:// help.fishbowlinventory.com/

advanced/s/article/CustomerModule buttonsNew creates a new customer .\nSave saves any changes made to the

customer.\nDelete deletes a customer . \nHistory opens the Purchase History report for the customer .\nCheck Balance

gets the customer's balance from the accounting system . This button is also available in the Sales Order module

.\nEmail opens a window to compose an email. If the module's default report is specified, the PDF report will be

attached. Email can be configured on the[]url heading content images Email tab of the Settings module . \nPrint sends

the default module report to the printer.\nHow To opens this article in a web browser.\nRefresh reloads whatever is

currently open in the module. https:// help.fishbowlinventory.com/ advanced/s/article/CustomerCreate a new customerThe

only required fields when creating a new customer are the name and the street address. Once a customer has been created,

the information entered may be edited at any time. Follow these steps to create a new customer in the Fishbowl

database.[] https:// help.fishbowlinventory.com/ advanced/s/article/CustomerModify an existing customerCustomer

information may be modified at any time. To edit a customer, double-click the customer in the search pane. Changes may

be made by clicking the various tabs. For an explanation of each tab, see the TABS section. Remember to click the Save

button on the module toolbar after making any modifications.[] []url heading content images https://

help.fishbowlinventory.com/ advanced/s/article/CustomerDelete a customerA customer may only be deleted when new and

unattached to any orders. Once an order has been made, a customer cannot be deleted and therefore should be set as

inactive. https:// help.fishbowlinventory.com/ advanced/s/article/CustomerInactivate a customerFishbowl will still store

history and information about an inactive customer. However, making a customer inactive will hide that information from

any list containing customer names. You may view an inactive customer by clicking the Advanced Search button and

choosing the Show inactive only or Show all options at the bottom of the window. Follow these instructions to inactivate

a customer.[] https:// help.fishbowlinventory.com/ advanced/s/article/CustomerCreate customer groupsCustomers can be

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help.fishbowlinventory.com/ advanced/s/article/CustomerSearchThe Search pane on the left can be used to filter by Name ,

City , or State . Records can also be found by typing in the table . Click the Advanced Search button to search the

Custom Fields and the following search options.\n[] https:// help.fishbowlinventory.com/

advanced/s/article/CustomerUpdate a customer addressAn address may be edited on the Address tab of the Customer module .

Addresses can also be created or modified through the Customers import .[] https:// help.fishbowlinventory.com/

advanced/s/article/CustomerHistory buttonTo see a customer's purchase history, open the customer, and click the History

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History button, open the Reports module options and select a different report next to Customer Purchase History .[]

Check balanceThe Check Balance button appears []url heading content images https:// help.fishbowlinventory.com/

advanced/s/article/Customerwhen Fishbowl is integrated with an accounting system. When this button is pressed, a dialog

will display the following information for the customer. This button is also available in the Sales Order module

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details. Many of the customer details will be pulled into the Details tab of the Sales Order module when the customer is

selected on a sales order.\n \nThe Groups tab allows the customer to be organized into existing customer groups. These

groups can then be used to create pricing rules . For more information, see Create Customer Groups .\nIf a customer uses

a different number than the Fishbowl product number, that information can be stored on the Parts tab. \nThe Memo tab is

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portion of the screen displays the date a memo was created, by what user, as well as a preview of the memo. Click on the

preview to view the entire message in the window below. \nUse the component toolbar on the right to Add a new memo, Edit

an existing memo, or Delete a memo. To print all of the memos for a customer, click the Print button.\nThe Custom tab

stores additional fields for the order that can be customized to fit the needs of each company.\n\nSome aspects of the

Customer module can be customized by opening the module, clicking the Tools menu, and then selecting Module Options .

https:// help.fishbowlinventory.com/ advanced/s/article/CustomerInformation []

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Content:

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Customer[] https:// help.fishbowlinventory.com/ advanced/s/article/CustomerDec 17, 2024Knowledge[] https://

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only required fields when creating a new customer are the name and the street address. Once a customer has been created,

the information entered may be edited at any time. Follow these steps to create a new customer in the Fishbowl

database.[] https:// help.fishbowlinventory.com/ advanced/s/article/CustomerModify an existing customerCustomer

information may be modified at any time. To edit a customer, double-click the customer in the search pane. Changes may

be made by clicking the various tabs. For an explanation of each tab, see the TABS section. Remember to click the Save

button on the module toolbar after making any modifications.[] []url heading content images https://

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Check balanceThe Check Balance button appears []url heading content images https:// help.fishbowlinventory.com/

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will display the following information for the customer. This button is also available in the Sales Order module

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details. Many of the customer details will be pulled into the Details tab of the Sales Order module when the customer is

selected on a sales order.\n \nThe Groups tab allows the customer to be organized into existing customer groups. These

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portion of the screen displays the date a memo was created, by what user, as well as a preview of the memo. Click on the

preview to view the entire message in the window below. \nUse the component toolbar on the right to Add a new memo, Edit

an existing memo, or Delete a memo. To print all of the memos for a customer, click the Print button.\nThe Custom tab

stores additional fields for the order that can be customized to fit the needs of each company.\n\nSome aspects of the

Customer module can be customized by opening the module, clicking the Tools menu, and then selecting Module Options .

https:// help.fishbowlinventory.com/ advanced/s/article/CustomerInformation []

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Response: Based on the provided context, the only required fields when creating a new customer are the name and the street

address.

--------------------------------------------------------------------------------

Asking (Row 6): How do you edit an existing customer's information?

response for row 6

Query: How do you edit an existing customer's information?

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Content:

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Customer[] https:// help.fishbowlinventory.com/ advanced/s/article/CustomerDec 17, 2024Knowledge[] https://

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information may be modified at any time. To edit a customer, double-click the customer in the search pane. Changes may

be made by clicking the various tabs. For an explanation of each tab, see the TABS section. Remember to click the Save

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Customer module can be customized by opening the module, clicking the Tools menu, and then selecting Module Options .

https:// help.fishbowlinventory.com/ advanced/s/article/CustomerInformation []

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Content:

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Customer[] https:// help.fishbowlinventory.com/ advanced/s/article/CustomerDec 17, 2024Knowledge[] https://

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https:// help.fishbowlinventory.com/ advanced/s/article/CustomerInformation []

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Response: To edit an existing customer's information in Fishbowl, follow these steps: 1. Navigate to the \*\*Customer\*\* module,

located in the \*\*Sales\*\* group. 2. Find the customer you wish to edit using the search pane on the left. You can filter

by Name, City, or State, or type directly in the table. 3. Double-click the customer in the search pane to open their

record. 4. Make the desired changes by clicking the various tabs (e.g., Account Info, Details, Address, Groups). 5.

After making modifications, click the \*\*Save\*\* button on the module toolbar.

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Asking (Row 7): Under what condition can a customer be deleted?

response for row 7

Query: Under what condition can a customer be deleted?

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Content:

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Customer[] https:// help.fishbowlinventory.com/ advanced/s/article/CustomerDec 17, 2024Knowledge[] https://

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an existing memo, or Delete a memo. To print all of the memos for a customer, click the Print button.\nThe Custom tab

stores additional fields for the order that can be customized to fit the needs of each company.\n\nSome aspects of the

Customer module can be customized by opening the module, clicking the Tools menu, and then selecting Module Options .

https:// help.fishbowlinventory.com/ advanced/s/article/CustomerInformation []

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Content:

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Customer[] https:// help.fishbowlinventory.com/ advanced/s/article/CustomerDec 17, 2024Knowledge[] https://

help.fishbowlinventory.com/ advanced/s/article/CustomerArticle DetailsThe Customer module, located in the Sales group ,

allows customer information, including addresses, groups, and details to be added and edited.[] https://

help.fishbowlinventory.com/ advanced/s/article/CustomerContents [] https:// help.fishbowlinventory.com/

advanced/s/article/CustomerModule buttonsNew creates a new customer .\nSave saves any changes made to the

customer.\nDelete deletes a customer . \nHistory opens the Purchase History report for the customer .\nCheck Balance

gets the customer's balance from the accounting system . This button is also available in the Sales Order module

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the default module report to the printer.\nHow To opens this article in a web browser.\nRefresh reloads whatever is

currently open in the module. https:// help.fishbowlinventory.com/ advanced/s/article/CustomerCreate a new customerThe

only required fields when creating a new customer are the name and the street address. Once a customer has been created,

the information entered may be edited at any time. Follow these steps to create a new customer in the Fishbowl

database.[] https:// help.fishbowlinventory.com/ advanced/s/article/CustomerModify an existing customerCustomer

information may be modified at any time. To edit a customer, double-click the customer in the search pane. Changes may

be made by clicking the various tabs. For an explanation of each tab, see the TABS section. Remember to click the Save

button on the module toolbar after making any modifications.[] []url heading content images https://

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unattached to any orders. Once an order has been made, a customer cannot be deleted and therefore should be set as

inactive. https:// help.fishbowlinventory.com/ advanced/s/article/CustomerInactivate a customerFishbowl will still store

history and information about an inactive customer. However, making a customer inactive will hide that information from

any list containing customer names. You may view an inactive customer by clicking the Advanced Search button and

choosing the Show inactive only or Show all options at the bottom of the window. Follow these instructions to inactivate

a customer.[] https:// help.fishbowlinventory.com/ advanced/s/article/CustomerCreate customer groupsCustomers can be

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help.fishbowlinventory.com/ advanced/s/article/CustomerSearchThe Search pane on the left can be used to filter by Name ,

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Custom Fields and the following search options.\n[] https:// help.fishbowlinventory.com/

advanced/s/article/CustomerUpdate a customer addressAn address may be edited on the Address tab of the Customer module .

Addresses can also be created or modified through the Customers import .[] https:// help.fishbowlinventory.com/

advanced/s/article/CustomerHistory buttonTo see a customer's purchase history, open the customer, and click the History

button. The same button is also found in the Sales Order module . To change the report that is loaded when clicking the

History button, open the Reports module options and select a different report next to Customer Purchase History .[]

Check balanceThe Check Balance button appears []url heading content images https:// help.fishbowlinventory.com/

advanced/s/article/Customerwhen Fishbowl is integrated with an accounting system. When this button is pressed, a dialog

will display the following information for the customer. This button is also available in the Sales Order module

.\n\nThe Account Info tab can be used to view and modify basic customer information.\nThe Details tab lists customer

details. Many of the customer details will be pulled into the Details tab of the Sales Order module when the customer is

selected on a sales order.\n \nThe Groups tab allows the customer to be organized into existing customer groups. These

groups can then be used to create pricing rules . For more information, see Create Customer Groups .\nIf a customer uses

a different number than the Fishbowl product number, that information can be stored on the Parts tab. \nThe Memo tab is

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portion of the screen displays the date a memo was created, by what user, as well as a preview of the memo. Click on the

preview to view the entire message in the window below. \nUse the component toolbar on the right to Add a new memo, Edit

an existing memo, or Delete a memo. To print all of the memos for a customer, click the Print button.\nThe Custom tab

stores additional fields for the order that can be customized to fit the needs of each company.\n\nSome aspects of the

Customer module can be customized by opening the module, clicking the Tools menu, and then selecting Module Options .

https:// help.fishbowlinventory.com/ advanced/s/article/CustomerInformation []

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Response: A customer may only be deleted when new and unattached to any orders.

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Asking (Row 8): How do you handle a customer that cannot be deleted but should no longer be active?

response for row 8

Query: How do you handle a customer that cannot be deleted but should no longer be active?

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Customer[] https:// help.fishbowlinventory.com/ advanced/s/article/CustomerDec 17, 2024Knowledge[] https://

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https:// help.fishbowlinventory.com/ advanced/s/article/CustomerInformation []

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Content:

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Customer[] https:// help.fishbowlinventory.com/ advanced/s/article/CustomerDec 17, 2024Knowledge[] https://

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only required fields when creating a new customer are the name and the street address. Once a customer has been created,

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database.[] https:// help.fishbowlinventory.com/ advanced/s/article/CustomerModify an existing customerCustomer

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Check balanceThe Check Balance button appears []url heading content images https:// help.fishbowlinventory.com/

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stores additional fields for the order that can be customized to fit the needs of each company.\n\nSome aspects of the

Customer module can be customized by opening the module, clicking the Tools menu, and then selecting Module Options .

https:// help.fishbowlinventory.com/ advanced/s/article/CustomerInformation []

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Response: According to the context, if a customer cannot be deleted (usually because an order has been made for them), they should

be set as inactive.

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Asking (Row 9): How can you view inactive customers?

response for row 9

Query: How can you view inactive customers?

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Content:

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Customer[] https:// help.fishbowlinventory.com/ advanced/s/article/CustomerDec 17, 2024Knowledge[] https://

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help.fishbowlinventory.com/ advanced/s/article/CustomerContents [] https:// help.fishbowlinventory.com/

advanced/s/article/CustomerModule buttonsNew creates a new customer .\nSave saves any changes made to the

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Check balanceThe Check Balance button appears []url heading content images https:// help.fishbowlinventory.com/

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https:// help.fishbowlinventory.com/ advanced/s/article/CustomerInformation []

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https:// help.fishbowlinventory.com/ advanced/s/article/CustomerInformation []

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Response: To view an inactive customer, click the Advanced Search button and choose the "Show inactive only" or "Show all" options

at the bottom of the window.

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Asking (Row 10): What is the purpose of customer groups, and how are they used?

response for row 10

Query: What is the purpose of customer groups, and how are they used?

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Content:

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Response: The purpose of customer groups is to organize customers. These groups can then be used to create pricing rules.

Customers can be assigned to existing customer groups using the Groups tab within the Customer module.

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Asking (Row 11): How can you check a customer's balance if Fishbowl is integrated with an accounting system?

response for row 11

Query: How can you check a customer's balance if Fishbowl is integrated with an accounting system?

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https:// help.fishbowlinventory.com/ advanced/s/article/CustomerInformation []

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Response: To check a customer's balance when Fishbowl is integrated with an accounting system, you can use the "Check Balance"

button. This button appears in the Customer module (and also the Sales Order module) when the integration is active.

Pressing this button retrieves the customer's balance from the accounting system and displays it in a dialog.

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Asking (Row 12): Where can you view a customer's purchase history?

response for row 12

Query: Where can you view a customer's purchase history?

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button on the module toolbar after making any modifications.[] []url heading content images https://

help.fishbowlinventory.com/ advanced/s/article/CustomerDelete a customerA customer may only be deleted when new and

unattached to any orders. Once an order has been made, a customer cannot be deleted and therefore should be set as

inactive. https:// help.fishbowlinventory.com/ advanced/s/article/CustomerInactivate a customerFishbowl will still store

history and information about an inactive customer. However, making a customer inactive will hide that information from

any list containing customer names. You may view an inactive customer by clicking the Advanced Search button and

choosing the Show inactive only or Show all options at the bottom of the window. Follow these instructions to inactivate

a customer.[] https:// help.fishbowlinventory.com/ advanced/s/article/CustomerCreate customer groupsCustomers can be

organized into groups. These groups can then be used to create pricing rules . Follow the steps below to edit customer

groups, or import data from a spreadsheet to assign many[]url heading content images customers to a group. https://

help.fishbowlinventory.com/ advanced/s/article/CustomerSearchThe Search pane on the left can be used to filter by Name ,

City , or State . Records can also be found by typing in the table . Click the Advanced Search button to search the

Custom Fields and the following search options.\n[] https:// help.fishbowlinventory.com/

advanced/s/article/CustomerUpdate a customer addressAn address may be edited on the Address tab of the Customer module .

Addresses can also be created or modified through the Customers import .[] https:// help.fishbowlinventory.com/

advanced/s/article/CustomerHistory buttonTo see a customer's purchase history, open the customer, and click the History

button. The same button is also found in the Sales Order module . To change the report that is loaded when clicking the

History button, open the Reports module options and select a different report next to Customer Purchase History .[]

Check balanceThe Check Balance button appears []url heading content images https:// help.fishbowlinventory.com/

advanced/s/article/Customerwhen Fishbowl is integrated with an accounting system. When this button is pressed, a dialog

will display the following information for the customer. This button is also available in the Sales Order module

.\n\nThe Account Info tab can be used to view and modify basic customer information.\nThe Details tab lists customer

details. Many of the customer details will be pulled into the Details tab of the Sales Order module when the customer is

selected on a sales order.\n \nThe Groups tab allows the customer to be organized into existing customer groups. These

groups can then be used to create pricing rules . For more information, see Create Customer Groups .\nIf a customer uses

a different number than the Fishbowl product number, that information can be stored on the Parts tab. \nThe Memo tab is

for internal useurl heading content images and allows users to enter notes regarding a specific customer. The top

portion of the screen displays the date a memo was created, by what user, as well as a preview of the memo. Click on the

preview to view the entire message in the window below. \nUse the component toolbar on the right to Add a new memo, Edit

an existing memo, or Delete a memo. To print all of the memos for a customer, click the Print button.\nThe Custom tab

stores additional fields for the order that can be customized to fit the needs of each company.\n\nSome aspects of the

Customer module can be customized by opening the module, clicking the Tools menu, and then selecting Module Options .

https:// help.fishbowlinventory.com/ advanced/s/article/CustomerInformation []

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Response: To see a customer's purchase history, open the customer record and click the History button. This button is also found

in the Sales Order module.

--------------------------------------------------------------------------------

Asking (Row 13): What information is stored on the 'Parts' tab within the Customer module?

response for row 13

Query: What information is stored on the 'Parts' tab within the Customer module?

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Content:

url heading content images https:// help.fishbowlinventory.com/ advanced/s/article/CustomerFishbowl Advanced -

Customer[] https:// help.fishbowlinventory.com/ advanced/s/article/CustomerDec 17, 2024Knowledge[] https://

help.fishbowlinventory.com/ advanced/s/article/CustomerArticle DetailsThe Customer module, located in the Sales group ,

allows customer information, including addresses, groups, and details to be added and edited.[] https://

help.fishbowlinventory.com/ advanced/s/article/CustomerContents [] https:// help.fishbowlinventory.com/

advanced/s/article/CustomerModule buttonsNew creates a new customer .\nSave saves any changes made to the

customer.\nDelete deletes a customer . \nHistory opens the Purchase History report for the customer .\nCheck Balance

gets the customer's balance from the accounting system . This button is also available in the Sales Order module

.\nEmail opens a window to compose an email. If the module's default report is specified, the PDF report will be

attached. Email can be configured on the[]url heading content images Email tab of the Settings module . \nPrint sends

the default module report to the printer.\nHow To opens this article in a web browser.\nRefresh reloads whatever is

currently open in the module. https:// help.fishbowlinventory.com/ advanced/s/article/CustomerCreate a new customerThe

only required fields when creating a new customer are the name and the street address. Once a customer has been created,

the information entered may be edited at any time. Follow these steps to create a new customer in the Fishbowl

database.[] https:// help.fishbowlinventory.com/ advanced/s/article/CustomerModify an existing customerCustomer

information may be modified at any time. To edit a customer, double-click the customer in the search pane. Changes may

be made by clicking the various tabs. For an explanation of each tab, see the TABS section. Remember to click the Save

button on the module toolbar after making any modifications.[] []url heading content images https://

help.fishbowlinventory.com/ advanced/s/article/CustomerDelete a customerA customer may only be deleted when new and

unattached to any orders. Once an order has been made, a customer cannot be deleted and therefore should be set as

inactive. https:// help.fishbowlinventory.com/ advanced/s/article/CustomerInactivate a customerFishbowl will still store

history and information about an inactive customer. However, making a customer inactive will hide that information from

any list containing customer names. You may view an inactive customer by clicking the Advanced Search button and

choosing the Show inactive only or Show all options at the bottom of the window. Follow these instructions to inactivate

a customer.[] https:// help.fishbowlinventory.com/ advanced/s/article/CustomerCreate customer groupsCustomers can be

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groups, or import data from a spreadsheet to assign many[]url heading content images customers to a group. https://

help.fishbowlinventory.com/ advanced/s/article/CustomerSearchThe Search pane on the left can be used to filter by Name ,

City , or State . Records can also be found by typing in the table . Click the Advanced Search button to search the

Custom Fields and the following search options.\n[] https:// help.fishbowlinventory.com/

advanced/s/article/CustomerUpdate a customer addressAn address may be edited on the Address tab of the Customer module .

Addresses can also be created or modified through the Customers import .[] https:// help.fishbowlinventory.com/

advanced/s/article/CustomerHistory buttonTo see a customer's purchase history, open the customer, and click the History

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Check balanceThe Check Balance button appears []url heading content images https:// help.fishbowlinventory.com/

advanced/s/article/Customerwhen Fishbowl is integrated with an accounting system. When this button is pressed, a dialog

will display the following information for the customer. This button is also available in the Sales Order module

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selected on a sales order.\n \nThe Groups tab allows the customer to be organized into existing customer groups. These

groups can then be used to create pricing rules . For more information, see Create Customer Groups .\nIf a customer uses

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portion of the screen displays the date a memo was created, by what user, as well as a preview of the memo. Click on the

preview to view the entire message in the window below. \nUse the component toolbar on the right to Add a new memo, Edit

an existing memo, or Delete a memo. To print all of the memos for a customer, click the Print button.\nThe Custom tab

stores additional fields for the order that can be customized to fit the needs of each company.\n\nSome aspects of the

Customer module can be customized by opening the module, clicking the Tools menu, and then selecting Module Options .

https:// help.fishbowlinventory.com/ advanced/s/article/CustomerInformation []

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Content:

url heading content images https:// help.fishbowlinventory.com/ advanced/s/article/CustomerFishbowl Advanced -

Customer[] https:// help.fishbowlinventory.com/ advanced/s/article/CustomerDec 17, 2024Knowledge[] https://

help.fishbowlinventory.com/ advanced/s/article/CustomerArticle DetailsThe Customer module, located in the Sales group ,

allows customer information, including addresses, groups, and details to be added and edited.[] https://

help.fishbowlinventory.com/ advanced/s/article/CustomerContents [] https:// help.fishbowlinventory.com/

advanced/s/article/CustomerModule buttonsNew creates a new customer .\nSave saves any changes made to the

customer.\nDelete deletes a customer . \nHistory opens the Purchase History report for the customer .\nCheck Balance

gets the customer's balance from the accounting system . This button is also available in the Sales Order module

.\nEmail opens a window to compose an email. If the module's default report is specified, the PDF report will be

attached. Email can be configured on the[]url heading content images Email tab of the Settings module . \nPrint sends

the default module report to the printer.\nHow To opens this article in a web browser.\nRefresh reloads whatever is

currently open in the module. https:// help.fishbowlinventory.com/ advanced/s/article/CustomerCreate a new customerThe

only required fields when creating a new customer are the name and the street address. Once a customer has been created,

the information entered may be edited at any time. Follow these steps to create a new customer in the Fishbowl

database.[] https:// help.fishbowlinventory.com/ advanced/s/article/CustomerModify an existing customerCustomer

information may be modified at any time. To edit a customer, double-click the customer in the search pane. Changes may

be made by clicking the various tabs. For an explanation of each tab, see the TABS section. Remember to click the Save

button on the module toolbar after making any modifications.[] []url heading content images https://

help.fishbowlinventory.com/ advanced/s/article/CustomerDelete a customerA customer may only be deleted when new and

unattached to any orders. Once an order has been made, a customer cannot be deleted and therefore should be set as

inactive. https:// help.fishbowlinventory.com/ advanced/s/article/CustomerInactivate a customerFishbowl will still store

history and information about an inactive customer. However, making a customer inactive will hide that information from

any list containing customer names. You may view an inactive customer by clicking the Advanced Search button and

choosing the Show inactive only or Show all options at the bottom of the window. Follow these instructions to inactivate

a customer.[] https:// help.fishbowlinventory.com/ advanced/s/article/CustomerCreate customer groupsCustomers can be

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help.fishbowlinventory.com/ advanced/s/article/CustomerSearchThe Search pane on the left can be used to filter by Name ,

City , or State . Records can also be found by typing in the table . Click the Advanced Search button to search the

Custom Fields and the following search options.\n[] https:// help.fishbowlinventory.com/

advanced/s/article/CustomerUpdate a customer addressAn address may be edited on the Address tab of the Customer module .

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advanced/s/article/CustomerHistory buttonTo see a customer's purchase history, open the customer, and click the History

button. The same button is also found in the Sales Order module . To change the report that is loaded when clicking the

History button, open the Reports module options and select a different report next to Customer Purchase History .[]

Check balanceThe Check Balance button appears []url heading content images https:// help.fishbowlinventory.com/

advanced/s/article/Customerwhen Fishbowl is integrated with an accounting system. When this button is pressed, a dialog

will display the following information for the customer. This button is also available in the Sales Order module

.\n\nThe Account Info tab can be used to view and modify basic customer information.\nThe Details tab lists customer

details. Many of the customer details will be pulled into the Details tab of the Sales Order module when the customer is

selected on a sales order.\n \nThe Groups tab allows the customer to be organized into existing customer groups. These

groups can then be used to create pricing rules . For more information, see Create Customer Groups .\nIf a customer uses

a different number than the Fishbowl product number, that information can be stored on the Parts tab. \nThe Memo tab is

for internal useurl heading content images and allows users to enter notes regarding a specific customer. The top

portion of the screen displays the date a memo was created, by what user, as well as a preview of the memo. Click on the

preview to view the entire message in the window below. \nUse the component toolbar on the right to Add a new memo, Edit

an existing memo, or Delete a memo. To print all of the memos for a customer, click the Print button.\nThe Custom tab

stores additional fields for the order that can be customized to fit the needs of each company.\n\nSome aspects of the

Customer module can be customized by opening the module, clicking the Tools menu, and then selecting Module Options .

https:// help.fishbowlinventory.com/ advanced/s/article/CustomerInformation []

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Response: If a customer uses a different number than the Fishbowl product number, that information can be stored on the Parts tab.

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Asking (Row 14): What is the function of the 'Memo' tab in the Customer module?

response for row 14

Query: What is the function of the 'Memo' tab in the Customer module?

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Content:

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Customer[] https:// help.fishbowlinventory.com/ advanced/s/article/CustomerDec 17, 2024Knowledge[] https://

help.fishbowlinventory.com/ advanced/s/article/CustomerArticle DetailsThe Customer module, located in the Sales group ,

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help.fishbowlinventory.com/ advanced/s/article/CustomerContents [] https:// help.fishbowlinventory.com/

advanced/s/article/CustomerModule buttonsNew creates a new customer .\nSave saves any changes made to the

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the default module report to the printer.\nHow To opens this article in a web browser.\nRefresh reloads whatever is

currently open in the module. https:// help.fishbowlinventory.com/ advanced/s/article/CustomerCreate a new customerThe

only required fields when creating a new customer are the name and the street address. Once a customer has been created,

the information entered may be edited at any time. Follow these steps to create a new customer in the Fishbowl

database.[] https:// help.fishbowlinventory.com/ advanced/s/article/CustomerModify an existing customerCustomer

information may be modified at any time. To edit a customer, double-click the customer in the search pane. Changes may

be made by clicking the various tabs. For an explanation of each tab, see the TABS section. Remember to click the Save

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help.fishbowlinventory.com/ advanced/s/article/CustomerDelete a customerA customer may only be deleted when new and

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help.fishbowlinventory.com/ advanced/s/article/CustomerSearchThe Search pane on the left can be used to filter by Name ,

City , or State . Records can also be found by typing in the table . Click the Advanced Search button to search the

Custom Fields and the following search options.\n[] https:// help.fishbowlinventory.com/

advanced/s/article/CustomerUpdate a customer addressAn address may be edited on the Address tab of the Customer module .

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advanced/s/article/CustomerHistory buttonTo see a customer's purchase history, open the customer, and click the History

button. The same button is also found in the Sales Order module . To change the report that is loaded when clicking the

History button, open the Reports module options and select a different report next to Customer Purchase History .[]

Check balanceThe Check Balance button appears []url heading content images https:// help.fishbowlinventory.com/

advanced/s/article/Customerwhen Fishbowl is integrated with an accounting system. When this button is pressed, a dialog

will display the following information for the customer. This button is also available in the Sales Order module

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a different number than the Fishbowl product number, that information can be stored on the Parts tab. \nThe Memo tab is

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portion of the screen displays the date a memo was created, by what user, as well as a preview of the memo. Click on the

preview to view the entire message in the window below. \nUse the component toolbar on the right to Add a new memo, Edit

an existing memo, or Delete a memo. To print all of the memos for a customer, click the Print button.\nThe Custom tab

stores additional fields for the order that can be customized to fit the needs of each company.\n\nSome aspects of the

Customer module can be customized by opening the module, clicking the Tools menu, and then selecting Module Options .

https:// help.fishbowlinventory.com/ advanced/s/article/CustomerInformation []

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Content:

url heading content images https:// help.fishbowlinventory.com/ advanced/s/article/CustomerFishbowl Advanced -

Customer[] https:// help.fishbowlinventory.com/ advanced/s/article/CustomerDec 17, 2024Knowledge[] https://

help.fishbowlinventory.com/ advanced/s/article/CustomerArticle DetailsThe Customer module, located in the Sales group ,

allows customer information, including addresses, groups, and details to be added and edited.[] https://

help.fishbowlinventory.com/ advanced/s/article/CustomerContents [] https:// help.fishbowlinventory.com/

advanced/s/article/CustomerModule buttonsNew creates a new customer .\nSave saves any changes made to the

customer.\nDelete deletes a customer . \nHistory opens the Purchase History report for the customer .\nCheck Balance

gets the customer's balance from the accounting system . This button is also available in the Sales Order module

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currently open in the module. https:// help.fishbowlinventory.com/ advanced/s/article/CustomerCreate a new customerThe

only required fields when creating a new customer are the name and the street address. Once a customer has been created,

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Custom Fields and the following search options.\n[] https:// help.fishbowlinventory.com/

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advanced/s/article/CustomerHistory buttonTo see a customer's purchase history, open the customer, and click the History

button. The same button is also found in the Sales Order module . To change the report that is loaded when clicking the

History button, open the Reports module options and select a different report next to Customer Purchase History .[]

Check balanceThe Check Balance button appears []url heading content images https:// help.fishbowlinventory.com/

advanced/s/article/Customerwhen Fishbowl is integrated with an accounting system. When this button is pressed, a dialog

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stores additional fields for the order that can be customized to fit the needs of each company.\n\nSome aspects of the

Customer module can be customized by opening the module, clicking the Tools menu, and then selecting Module Options .

https:// help.fishbowlinventory.com/ advanced/s/article/CustomerInformation []

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Response: The 'Memo' tab in the Customer module is for internal use and allows users to enter notes regarding a specific customer.

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Asking (Row 15): What is the purpose of the Custom Field module?

response for row 15

Query: What is the purpose of the Custom Field module?

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Content:

url heading content images https:// help.fishbowlinventory.com/ advanced/s/article/Custom- FieldFishbowl Advanced -

Custom Field[] https:// help.fishbowlinventory.com/ advanced/s/article/Custom- FieldDec 17, 2024Knowledge[] https://

help.fishbowlinventory.com/ advanced/s/article/Custom- FieldArticle DetailsThe Custom Field module, located in the Setup

group , allows custom fields to be created and modified. Custom fields appear throughout Fishbowl and allow customized

data to be stored in several modules.[] https:// help.fishbowlinventory.com/ advanced/s/article/Custom- FieldContents []

https:// help.fishbowlinventory.com/ advanced/s/article/Custom- FieldCreate or edit a custom fieldCustom fields can be

associated with modules and items.\nCustom fields can also be imported from a spreadsheet .[] https://

help.fishbowlinventory.com/ advanced/s/article/Custom- FieldCustom field types[] https:// help.fishbowlinventory.com/

advanced/s/article/Custom- FieldCreate a listLists are used to store each item that is available in a dropdown list.[]

https:// help.fishbowlinventory.com/ advanced/s/article/Custom- FieldSearchThe search pane on the left of the Custom

Field module can be used to search for custom fields by name[]url heading content images or description. Note that the

search pane displays the module or item containing the custom field. The advanced search can also be used to find custom

fields by type, list, required custom fields, inactive custom fields, etc.\n https:// help.fishbowlinventory.com/

advanced/s/article/Custom- FieldUse a custom field with an advanced searchOnce a new custom field has been created in a

module, the data in the custom field can be searched by using that module's advanced search. To use a custom field in an

advanced search, click the Advanced Search button in the search pane for the desired module and then click the Custom

tab in the search window.\n[] https:// help.fishbowlinventory.com/ advanced/s/article/Custom- FieldMatching custom

fieldsSome custom fields with the same name and type can transfer from one module to another.\nSome aspects of the

Custom Field module can be customized by opening the module, clicking[]url heading content images the Tools menu, and

then selecting Module Options . https:// help.fishbowlinventory.com/ advanced/s/article/Custom- FieldInformation []

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Content:

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Custom Field[] https:// help.fishbowlinventory.com/ advanced/s/article/Custom- FieldDec 17, 2024Knowledge[] https://

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group , allows custom fields to be created and modified. Custom fields appear throughout Fishbowl and allow customized

data to be stored in several modules.[] https:// help.fishbowlinventory.com/ advanced/s/article/Custom- FieldContents []

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Field module can be used to search for custom fields by name[]url heading content images or description. Note that the

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advanced/s/article/Custom- FieldUse a custom field with an advanced searchOnce a new custom field has been created in a

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advanced search, click the Advanced Search button in the search pane for the desired module and then click the Custom

tab in the search window.\n[] https:// help.fishbowlinventory.com/ advanced/s/article/Custom- FieldMatching custom

fieldsSome custom fields with the same name and type can transfer from one module to another.\nSome aspects of the

Custom Field module can be customized by opening the module, clicking[]url heading content images the Tools menu, and

then selecting Module Options . https:// help.fishbowlinventory.com/ advanced/s/article/Custom- FieldInformation []

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Response: The purpose of the Custom Field module is to allow custom fields to be created and modified. These custom fields appear

throughout Fishbowl and allow customized data to be stored in several modules.

--------------------------------------------------------------------------------

Asking (Row 16): Can custom fields be associated with specific modules or items?

response for row 16

Query: Can custom fields be associated with specific modules or items?

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then selecting Module Options . https:// help.fishbowlinventory.com/ advanced/s/article/Custom- FieldInformation []

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then selecting Module Options . https:// help.fishbowlinventory.com/ advanced/s/article/Custom- FieldInformation []

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Response: Yes, according to the provided context, custom fields can be associated with modules and items.

--------------------------------------------------------------------------------

Asking (Row 17): How can you use a custom field in an advanced search within another module?

response for row 17

Query: How can you use a custom field in an advanced search within another module?

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tab in the search window.\n[] https:// help.fishbowlinventory.com/ advanced/s/article/Custom- FieldMatching custom

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Response: Based on the provided context: Once a new custom field has been created in a module, the data in that custom field can

be searched using that specific module's advanced search. To do this: 1. Go to the search pane for the desired module

(the one containing the custom field you want to search by). 2. Click the \*\*Advanced Search\*\* button. 3. In the search

window that appears, click the \*\*Custom\*\* tab. The context mentions that some custom fields with the same name and type

can transfer data from one module to another, but it does not explicitly describe the steps for using a custom field

created in one module as a search criterion within a \*different\* module's advanced search. It only details using the

custom field within the advanced search of the module it is associated with. Therefore, based \*only\* on the provided

text, how to use a custom field in an advanced search \*within another\* module cannot be fully determined.

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Asking (Row 18): Explain the concept of 'matching custom fields' between modules.

response for row 18

Query: Explain the concept of 'matching custom fields' between modules.

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advanced/s/article/Custom- FieldUse a custom field with an advanced searchOnce a new custom field has been created in a

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fieldsSome custom fields with the same name and type can transfer from one module to another.\nSome aspects of the

Custom Field module can be customized by opening the module, clicking[]url heading content images the Tools menu, and

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Response: In Fishbowl, the concept of 'matching custom fields' means that some custom fields that share the same name and type can

transfer their data from one module to another.

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Asking (Row 19): What are 'Lists' used for in the context of custom fields?

response for row 19

Query: What are 'Lists' used for in the context of custom fields?

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Response: Lists are used to store each item that is available in a dropdown list.

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Asking (Row 20): What kind of information does the Dashboard module provide?

response for row 20

Query: What kind of information does the Dashboard module provide?

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2024Knowledge[] https:// help.fishbowlinventory.com/ advanced/s/article/ Inventory-DashboardArticle DetailsThe Inventory

Dashboard module, located in the Materials group , provides warehouse managers with key metrics, such as costs of parts

to be reconciled, stock adjustments, expired parts, and more. \nIncludes graphs for stock adjustments, short and on-

hold parts, and a turnover sheet for average days in inventory.\n[] https:// help.fishbowlinventory.com/

advanced/s/article/ Inventory-DashboardKey Features [] https:// help.fishbowlinventory.com/ advanced/s/article/

Inventory-DashboardInformation []

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advanced/s/article/ Inventory-DashboardKey Features [] https:// help.fishbowlinventory.com/ advanced/s/article/

Inventory-DashboardInformation []

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Response: The Inventory Dashboard module provides warehouse managers with key metrics, such as: \* Costs of parts to be

reconciled \* Stock adjustments \* Expired parts \* Graphs for stock adjustments, short and on-hold parts \* A

turnover sheet for average days in inventory

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Asking (Row 21): How do you add new gadgets to the dashboard?

response for row 21

Query: How do you add new gadgets to the dashboard?

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Dashboard[] https:// help.fishbowlinventory.com/ advanced/s/article/ DashboardDec 17, 2024Knowledge[] https://

help.fishbowlinventory.com/ advanced/s/article/ DashboardArticle DetailsThe Dashboard module, located in the General

group , shows an overview of pending orders in the system and can also display reports and links to common tasks.

Fishbowl can save a customized dashboard for each Fishbowl user so that every user sees the information that is most

relevant to them. \n[] https:// help.fishbowlinventory.com/ advanced/s/article/ DashboardContents [] https://

help.fishbowlinventory.com/ advanced/s/article/ DashboardModule buttonsSave Layout saves any changes made to the

dashboard. \nLoad Layout reverts to the saved layout, discarding any unsaved changes. \nColumns allows the number of

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advanced/s/article/ DashboardAdd gadgetsFollow the steps below to add gadgets to the dashboard.\nClick the blue links in

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steps below to add a new tab. \n\nSome aspects of the Dashboard module can be customized by opening the module, clicking

the Tools menu, and then selecting Module Options .[] https:// help.fishbowlinventory.com/ advanced/s/article/

DashboardInformation []

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Response: I cannot determine the answer to that. The context mentions "Follow the steps below to add gadgets to the dashboard,"

but the specific steps are not included in the provided text.

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Asking (Row 22): Explain how to modify the items displayed within a dashboard gadget.

response for row 22

Query: Explain how to modify the items displayed within a dashboard gadget.

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steps below to add a new tab. \n\nSome aspects of the Dashboard module can be customized by opening the module, clicking

the Tools menu, and then selecting Module Options .[] https:// help.fishbowlinventory.com/ advanced/s/article/

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DashboardInformation []

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Response: To modify the items displayed within a dashboard gadget: The orders and items displayed in a gadget can be modified.

Most gadgets use the advanced search feature of the corresponding module to determine which items to display. The

context mentions following specific steps to modify the displayed items, but it does not list those steps.

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Asking (Row 23): Can you have multiple tabs on the Dashboard module? If so, how do you add them?

response for row 23

Query: Can you have multiple tabs on the Dashboard module? If so, how do you add them?

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group , shows an overview of pending orders in the system and can also display reports and links to common tasks.

Fishbowl can save a customized dashboard for each Fishbowl user so that every user sees the information that is most

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help.fishbowlinventory.com/ advanced/s/article/ DashboardModule buttonsSave Layout saves any changes made to the

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advanced/s/article/ DashboardAdd gadgetsFollow the steps below to add gadgets to the dashboard.\nClick the blue links in

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tabsThe Dashboard module has the ability to display several tabs. Each tab can contain different gadgets. Follow the

steps below to add a new tab. \n\nSome aspects of the Dashboard module can be customized by opening the module, clicking

the Tools menu, and then selecting Module Options .[] https:// help.fishbowlinventory.com/ advanced/s/article/

DashboardInformation []

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DashboardInformation []

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Response: Yes, the Dashboard module in Fishbowl has the ability to display several tabs. According to the context, you add them

by following the steps listed under the "Add tabs" section in the documentation. However, the specific steps are not

provided in the given context.

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Asking (Row 24): How do you save changes made to the dashboard layout?

response for row 24

Query: How do you save changes made to the dashboard layout?

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Response: To save changes made to the dashboard layout, use the \*\*Save Layout\*\* button. This button saves any changes made to the

dashboard.

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