

How to Update and Delete Sales Records

1) Launch Edit or Delete Dialog

PORTERS Trial expires in 595 days Catherine Porters Apps ?

Client Recruiter Job Person Resume Sales Process Activity

Sales List (1) Add New Customize View

ID	Detail	Amount	Record Date	Joining Date
10010	Sample	1,000,000	2014/10/20	

Context Menu:
Edit
Delete
Document
Email

Display the Sales record that you want to edit. Then click the title of that record and select "Edit" from the menu.

In case you want to delete the sales record, click "Delete" from the menu. Then in the delete confirmation dialog, click the "Yes button."

⚠ Caution: Delete action can't be undone.

- ⚠ There is a possibility that the screen image might change.
- ⚠ In this manual, the default menus displayed are the default settings.
To change the global menu display settings, please refer to the document "How to Customize the Global Menu".

2) Update Information

PORTERS Trial expires in 595 days

Client Recruiter Job

Sales List (1)

10010

Sales - Edit

required web document

Basic Information

Sales ID	10010	Client	Sample Client 01
Sales Amount	1,500,000	Recruiter	Sample Recruiter 01
Record Date	2014/10/20	Job	Sample Job 01
Joining Date		Job Owner	N/A Catherine Porters
Sales Owner	N/A Catherine Porters	Resume	Hanako Yamada(10003)
		Resume Owner	N/A Catherine Porters

Billing Information

Billing Client Name		Billing Zip Code	
Billing Division		Billing Address	
Billing Title			
Billing Name			

System Information

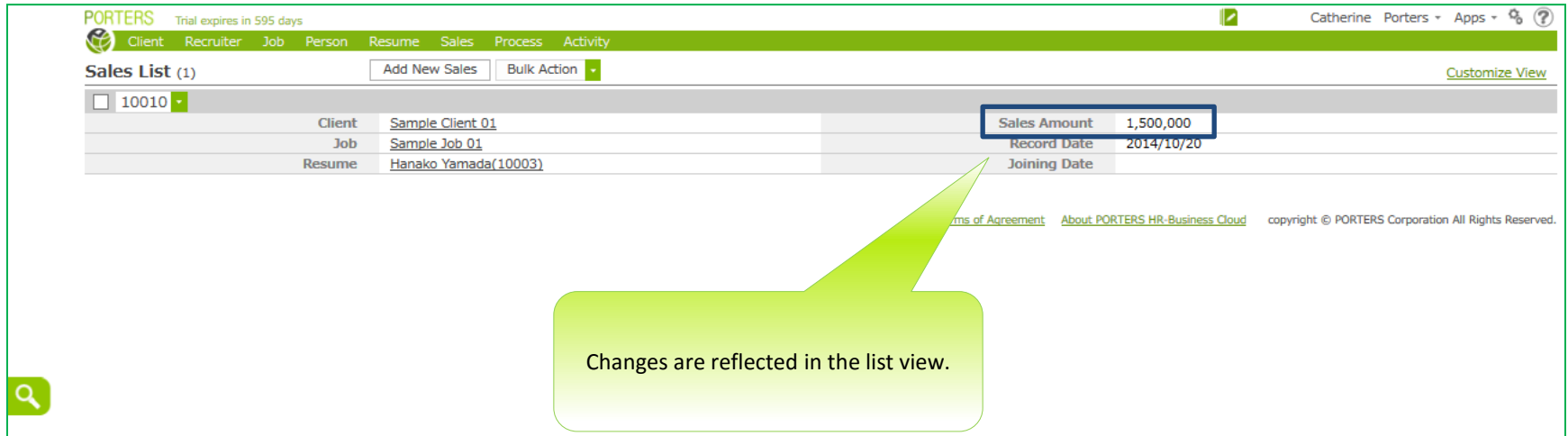
Date Created	2014/10/28 14:52:50		:52:50
Registered by	N/A Catherine Porters		Porters

[send notification email](#)

Save Cancel

After updating the information, click the "Save" button.

3) Verify Changes



The screenshot displays the PORTERS HR-Business Cloud interface. At the top, the user is logged in as Catherine. The main navigation bar includes links for Client, Recruiter, Job, Person, Resume, Sales, Process, and Activity. The current view is 'Sales List (1)', which includes buttons for 'Add New Sales' and 'Bulk Action'. A search icon is visible in the bottom left corner.

Client	Job	Resume	Sales Amount	Record Date	Joining Date
Sample Client 01	Sample Job 01	Hanako Yamada(10003)	1,500,000	2014/10/20	

Changes are reflected in the list view.