

Audit Event List

Audit Event	Occurs
Account Manager Change	Account manager for a client changed on the Clients screen or on the Client Information Update screen.
Archive Case Notes	Archive process completed on the Archive Case Notes screen.
Archive Data Restored	Archive data restored from the Archive Backup folder. This only applies for an Access onsite license if the archive data file is removed.
Archive/Balance Forward	Archive process completed on the Archive/Balance Forward screen.
Backup Data	Backup completed on the Back Up Data screen.
Balance Limit Change	Balance limit for a client changed on the Clients screen or on the Client Information Update screen.
Balance Minimum Change	Balance minimum for a client changed on the Clients screen or on the Client Information Update screen.
Bank Fee Posting	Bank fees posted on the Bank Fee Posting screen.
Case Note Delete	Case note deleted on the Clients screen.
Case Note Update	Case note updated on the Clients screen.
Check Layout Change	Changes made to the check layout on the Check Layout screen.
Check Run	Check run printed on the Print Checks screen.
Clear Check Printing User	User cleared on the Clear Check Printing User screen.
Client Add	Client added on the Clients screen.
Client Address Change	Address changed for a client on the Clients screen.
Client Balance Payout	Client balance transactions posted on the Client Balance Payout screen.
Client Bank Account # Change	Account number changed for a client's individual bank account on the Clients screen.
Client Cell Phone Change	Cell phone number changed for a client on the Clients screen.
Client Delete	Client deleted on the Delete Client screen.
Client Email Failed	Client email failed using the "Email" button on the Reports screen.
Client Email Sent	Client email sent successfully using the "Email" button on the Reports screen.
Client Fee Posting	Client fee transactions posted on the Client Fee Posting screen.
Client Information Update All	Client information updated with Update All on the Client Information Update screen.
Client Name Change	Name changed for a client on the Clients screen.
Client Phone Change	Phone number changed for a client on the Clients screen.
Client SSN Change	SSN changed for a client on the Clients screen.
Client Status Change	Status changed (active/inactive) for a client on the Clients screen.
Client Type Change	Client type for a client changed on the Clients screen or on the Client Information Update screen.
Client XEFT Account # Change	XEFT account number changed for a client on the Personal tab of the Clients screen.
Create Scheduled Deposits	Scheduled deposits created for clients on the Create Scheduled Deposits screen.
Create Scheduled Payments	Scheduled payments created for clients on the Create Scheduled Payments screen.
Deposit Import	Deposits imported on the Import ACH Deposits screen.
Email Client Reports	Reports sent to clients using the "Email" button on the Reports screen.
Email XEFT Transactions	Vendor emails sent for an XEFT export using the "Send Emails" button on the Export XEFT Transactions screen.
Interest Posting	Interest posted on the Interest Posting screen.
Mass Account # Change	Account number changed for a mass account on the List Maintenance screen.
Merge Deposit Categories	Deposit categories merged on the List Maintenance screen.
Merge Payment Categories	Payment categories merged on the List Maintenance screen.

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Positive Pay Export	Checks exported on the Export Positive Pay File screen.
Print Checks	Check run initiated on the Print Checks screen, or checks confirmed printed or set back to print.
Purge Data	Inactive client records removed on the Purge Data screen.
Receipt Req. Mark All Received	All receipts marked as received on the Receipt Required screen.
Reconcile Bank Account	Reconciliation finished on the Reconcile screen.
Reconcile Removed	Transaction from a previously completed reconciliation unreconciled on the Reconcile screen.
Reconcile Unreconcile All	Transactions for a completed bank reconciliation unreconciled on the Reconcile screen.
Reconciled Statement Change	Changes to a previously reconciled bank statement.
Repair Data File	Data file repaired. This only applies for an Access onsite license if the data file is damaged.
Reset Account Check Numbers	Next check number reset for a mass account on the List Maintenance screen or for an individual bank account on the Clients screen.
Reset Bank Fee Posting	Bank fee transactions posted with the Bank Fee Posting screen removed on the Reset Transactions screen.
Reset Check Run	Check run set back to print on the Reset Transactions screen.
Reset Client Balance Payout	Client balance transactions posted with the Client Balance Payout screen removed on the Reset Transactions screen.
Reset Client Fee Posting	Client fee transactions posted with the Client Fee Posting screen removed on the Reset Transactions screen.
Reset Deposit Import	Deposit transactions posted with the Import ACH Deposits screen removed on the Reset Transactions screen.
Reset Interest Posting	Interest transactions posted with the Interest Posting screen removed on the Reset Transactions screen.
Reset Positive Pay Export	Export flag for checks exported with the Export Positive Pay File screen removed on the Reset Transactions screen.
Reset Scheduled Deposit Create	Scheduled deposits created with the Create Scheduled Deposits screen removed on the Reset Transactions screen.
Reset Scheduled Deposits	Processed scheduled deposits removed on the Reset Transactions screen.
Reset Scheduled Payment Create	Scheduled payments created with the Create Scheduled Payments screen removed on the Reset Transactions screen.
Reset Scheduled Payments	Processed scheduled payments removed on the Reset Transactions screen.
Reset Scheduled Transfers	Processed scheduled transfers removed on the Reset Transactions screen.
Reset User	User login reset using the User Log on the Users screen or the User Maintenance application.
Reset XEFT Export	XEFT export flag removed on the Reset Transactions screen.
Scheduled Deposit Delete	Scheduled deposit deleted on the Clients screen.
Scheduled Deposit Skipped	Scheduled deposit skipped on the Process Scheduled Deposits screen.
Scheduled Deposit Update	Scheduled deposit updated on the Clients screen or Update Scheduled Deposits screen.
Scheduled Deposits Update All	Scheduled deposits updated with the "Update All" button on the Update Scheduled Deposits screen.
Scheduled Payment Delete	Scheduled payment deleted on the Clients screen.
Scheduled Payment Skipped	Scheduled payment skipped on the Process Scheduled Payments screen.
Scheduled Payment Update	Scheduled payment updated on the Clients screen or Update Scheduled Payments screen.
Scheduled Payments Memo Update	Updates to the check memo with the "Replace All" button on the Update Scheduled Payments screen.
Scheduled Payments Update All	Scheduled payments updated with the "Update All" button on the Update Scheduled Payments screen.

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Scheduled Transfer Delete	Scheduled transfer deleted on the Clients screen.
Scheduled Transfer Skipped	Scheduled transfer skipped on the Process Scheduled Transfers screen.
Scheduled Transfer Update	Scheduled transfer updated on the Clients screen.
Support Type Change	Support type for a client changed on the Clients screen or on the Client Information Update screen.
Transaction Delete	Transaction deleted on the Transaction Detail screen.
Transaction Update	Transaction updated on the Transaction Detail screen. This includes any changes to the amount, account, payment method, check #, exported flag, or "pay to" name.
User Login	User logged in to or out of RPM.
Vendor Add	Vendor added on the Vendors screen.
Vendor Address Change	Address changed for a vendor on the Vendors screen.
Vendor Address Delete	Address deleted for a vendor on the Vendors screen.
Vendor Email Failed	Vendor email failed using the "Send Emails" button on the Export XEFT Transactions screen.
Vendor Email Sent	Successful vendor email sent using the "Send Emails" button on the Export XEFT Transactions screen.
Vendor Name Change	Name changed for a vendor on the Vendors screen.
Vendor Status Change	Status changed (active/inactive) for a vendor on the Vendors screen.
Vendor XEFT Account # Change	XEFT account number changed for a vendor on the Vendors screen.
Verify Data	Verify Data process run on the Tech Support screen.
XEFT Export	XEFT payments exported on the Export XEFT Transactions screen.