

## **SALES**

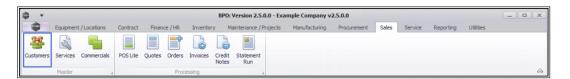
## **CUSTOMERS - NOTES**

Customer **Notes** can be added from the following screens:

- Call Listing
- View Customer
- Call Maintenance

Notes <u>cannot</u> be deleted or edited.

Ribbon Access: Sales > Customers



- 1. The *Customer Listing* screen will be displayed.
- 2. Select the *Site* where the Customer can be located.
  - The example has *Durban* selected.
- 3. Select the *Status* of the Customer.
  - The example has *Active* selected.
- 4. Click on the *row* of the *Customer* for whom you wish to add a note.
- 5. Click on the *Notes* tile.



Home Equip	ment	/Locations	Contract Finar	Customer Listing	aintenance / P			Procurement Sales	Service Reporting	) Utilities —	8 >
Add Edit Delete	C Sync	View S	ave Layout Wor	rkspaces Hold Releas		Decke	Durban Active	Befresh Expo	ort Reports Print		
Deservation			Farmak	•	Account Processing 2	Account	0		▼ Statem	ent	
Processing		*	Format	4 Status	Processing 2	.4	Currer	12 4	ports 🔺 Print	4	
inks 5											
inter text to search		CustomerCode	e CustomerType	CustomerName	Department	DeptName	SiteDescription	CustomerCreditLimit	CustomerWebSite	CustomerPhoneNumber	Custo
Functions	٩	R C	R E C	* C	a 🗖 c	REC	s C	=	8∎c	8 <b>8</b> C	* <b>O</b> C
	1	CUS001	RE	Cash Sales Account			Durban	10,000.00		000 000 0000	00000
Notes 🎽		HOP001	RE	Hope Works (Pty) Ltd			Durban	5,000.00	www.hopeworks.co.za	031 123 4567	98765
		DER001 4	RE	Derton / Technologies			Durban	250.00	www.dertonweb.co.za	031 123 4785	98/76
	1	OFF001	RE	Office Supplies Unlimited			Durban	75,000,000.00	www.cnn.co.za	031 789 4561	9874
Contacts		YES001	CO	Young Electric			Durban	100,000.00		082555555	23146
		WES001	RE	Westwood Dynamic			Durban	10,000,000.00	www.web.co.za	031 789 4561	1234
		TIA001	RE	Titan Group			Durban	100,000.00	www.web.co.za	031 852 9632	12325
Addresses	Þ	BOT0001	п	Bothas Networking inc			Durban	50,000.00	www.web.co.za	031 789 4563	98745
		SAM001	RE	Samanthas Diner			Durban	45,000.00	www.samsdiner.co.za	031 123 4567	12345
		DAN001	п	Danny Storm IT Cafe			Durban	75,000.00		031 785 4785	12365
Documents		PAN001	RE	Panda Copiers			Durban	50,000.00		031 123 4567	12345
Documents		HAC001	п	Hack PC - IT Shop			Durban	0.00		031 789 4561	66543
		PIN0001	GV	Pink Shoes			Durban	0.00		031 456 7894	1234
		HIL000001	HILLCRESTP	Mary Contrary			Durban	0.00		083 559	00000
Call History		JUS001	RE	Just In Time			Durban	50,000.00	www.justintime.co.za	031 123 4567	12345
		LIT0001	RE	Little Bee Honey			Durban	0.00	www.bee.co.za	031 123 4567	12345
	-	GRE001	RE	Green Tea Supplies			Durban	75,000.00		031 456 7891	12345
Project History		FIN0001	RE	Fine Hair Salon			Durban	0.00	www.finehair.co.za	031 123 4567	1234
		BET0001	RE	Betties Summer Shop at t			Durban	0.00			1234
		biancad	RE	North West Branch			Durban	0.00			0
History		DAN002	п	Dancing Shoes			Durban	10,000.00		031 123 4567	12345
		BIG0001	со	Big Bargains			Durban	10,000.00		031 456 7897	12345

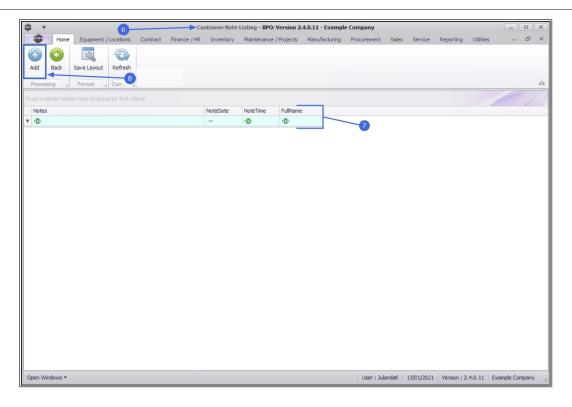
- 6. The *Customer Note Listing* screen will be displayed.
- 7. Any notes that have already been created for the customer, will display in this screen

## **ADD CUSTOMER NOTE**

8. Click on **Add**.

Short cut key: *Right click* to display the *Process* menu list. Click on *Add*.





- 9. The *Customer: [customer code]* screen will be displayed.
- 10. Note Date and Time: This will be auto populated with today's date and time of input.
  - **Date:** Type in or click on the down **arrow** to use the calendar function to select an alternative date.
  - **Time:** Type in or use the **arrow** indicators to select an alternative time.
- 11. **Employee:** This field will auto populate with the name of the employee who is currently logged onto the system. Click on the down **arrow** to select an alternative employee from the drop-down menu, if required.
- 12. **Note:** Click in the text box to type the customer Note.
- 13. When you have completed the note details, click on *Save*.



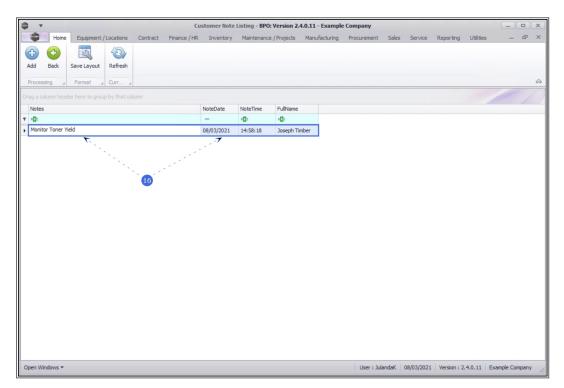
<b>\$</b> •			Cu	stomer : BO	T0001 - BPO: Version 2.4	.0.11 - Example	Company						x
Home Ed	quipment / Locations	Contract	Finance / HR	Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	- 8	×
		-											
Save Back		10											
Process 13		1 N.											\$
	L L L		T I										
Note Date and Time		14:58:18	\$										
	Joseph Timber		•		-0								
Note	Monitor Toner Yield				<u>~</u>								
Open Windows 🕶							User : Jul	andaK	08/03/2021	Version : 2.	4.0.11 E	xample Compan	iy /

- 14. When you receive the *Customer Processing* message informing you that;
- Note has been added to Customer No: [customer code].
  15. Click on OK.



Image: Save Layout Refresh     Image: Save Layout Refresh       Processing     Format       Curr     Image: Save Layout Refresh       Song a column header here to group by that column       Notes     NoteTime       Image:	🗘 🔻 Cu	stomer Note	Listing - BPO: V	ersion 2.4.	0.11 - Example	Company						
Add Back Save Layout Refresh Processing Pormat Curr	Home Equipment / Locations Contract Finance / HR	Inventory	Maintenance /	Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	-	₽ x
Notes     NoteDate     NoteTime     FullName       ID:	Add Back Save Layout Refresh											
O:     O:												
Monitor Toner Yield 08/03/2021 14:58:18 Joseph Timber	Notes	NoteDate	NoteTime	FullName								
Customer Processing Note has been added to Customer No : BOT0001.	• ADC	=	REC	88C								
Note has been added to Customer No : BOT0001.	Monitor Toner Yield	08/03/2021	14:58:18	Joseph Tim	ber							
		) Note ha		o Customer								

16. The Customer Note can now be *viewed* in the *Customer Note Listing* screen.





MNU.061.017

Help v2.5.0.14 - Pg 6 - Printed: 25/06/2024

CO3 Technologies (Pty) Ltd © Company Confidential