SALES

CUSTOMERS – NOTES
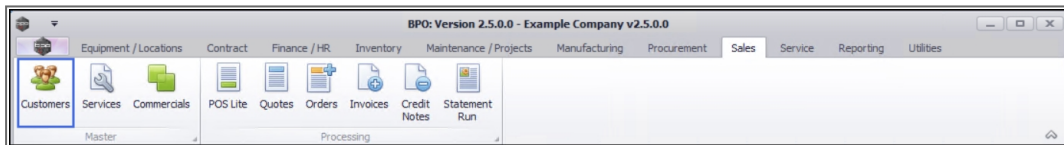
Customer **Notes** can be added from the following screens:

- **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.
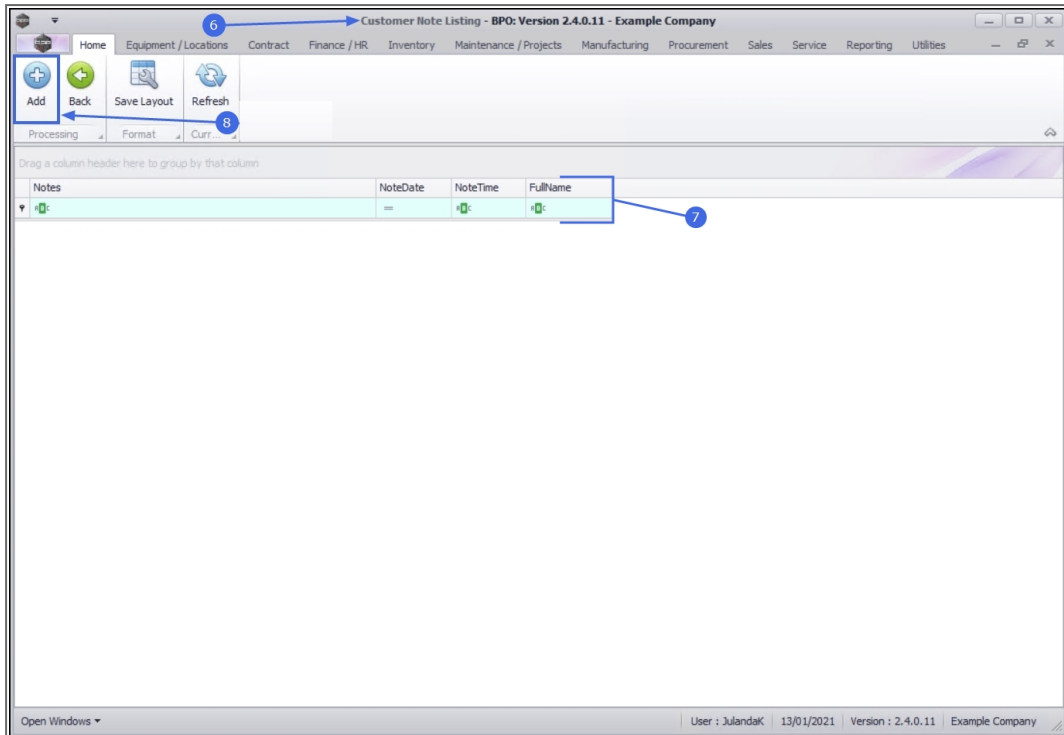5. Click on the *Notes* tile.
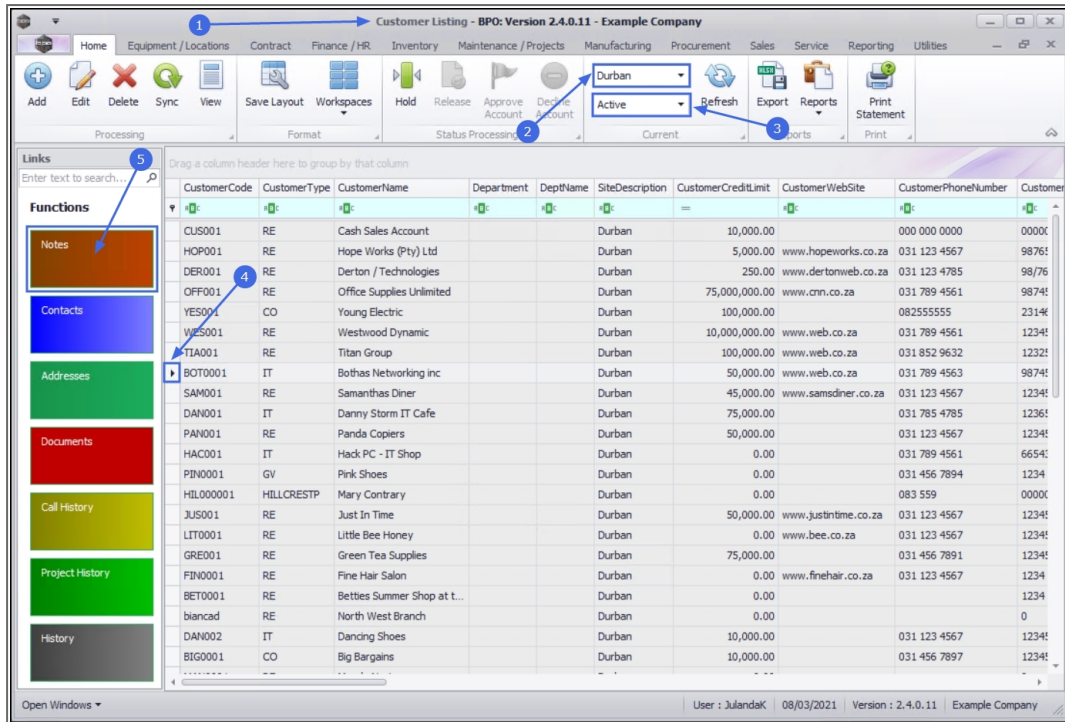
6. The *Customer Note Listing* screen will be displayed.

7. Any notes that have already been created for the customer, will display in this screen
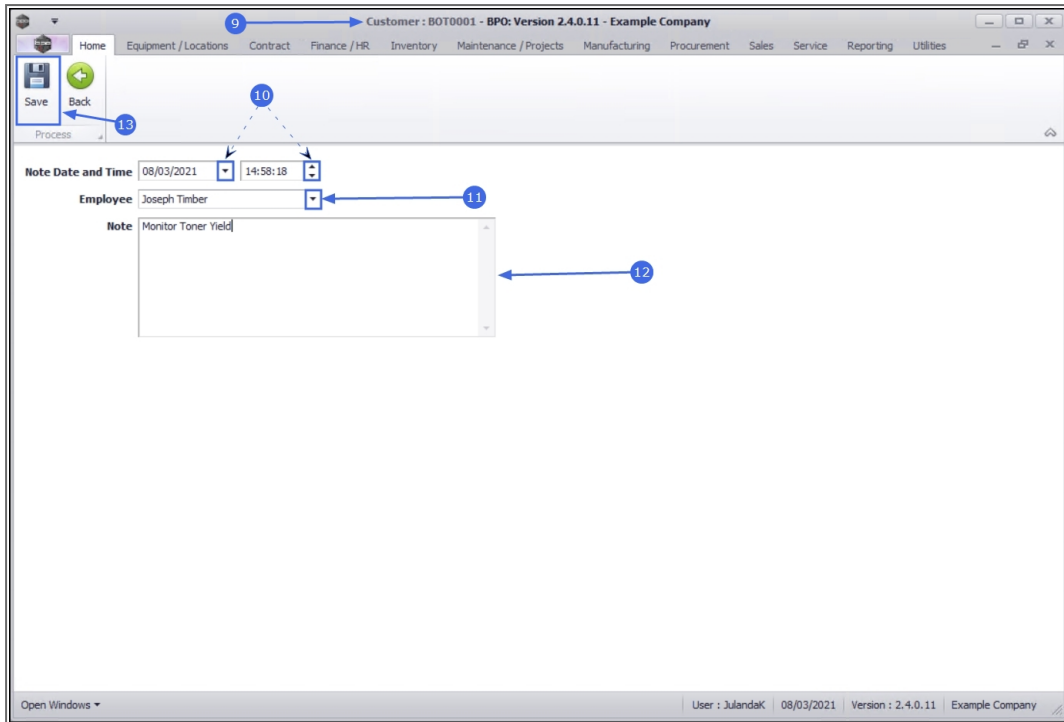
ADD CUSTOMER NOTE

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.

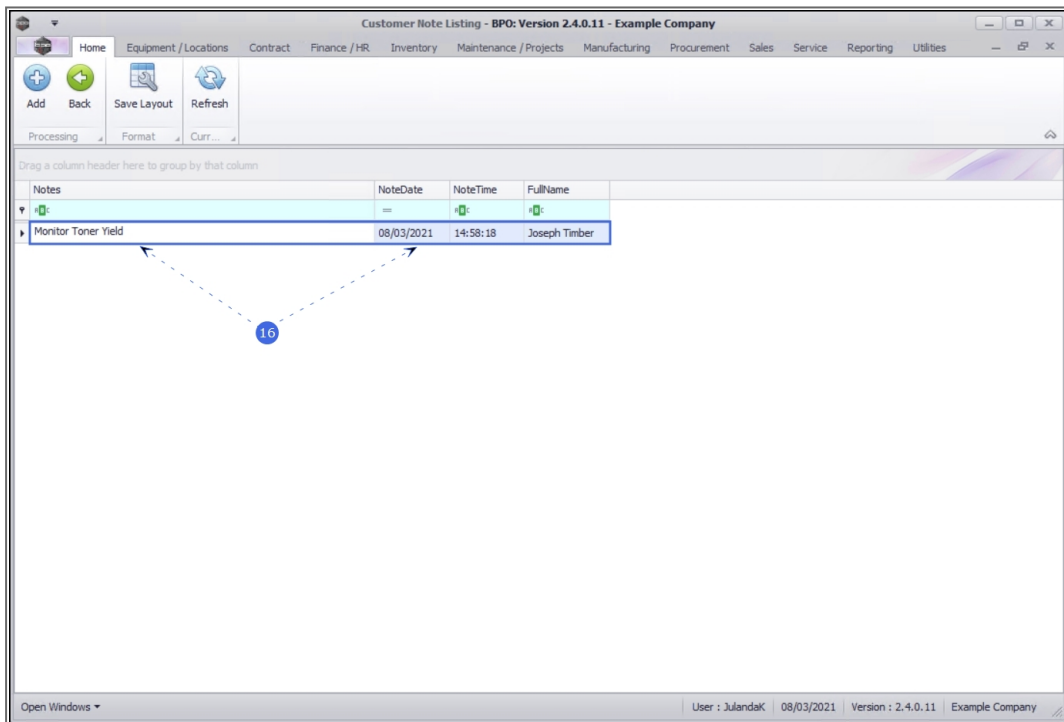13. When you have completed the note details, click on *Save*.

14. When you receive the **Customer Processing** message informing you that;

   - **Note has been added to Customer No: [**customer code**].**

15. Click on **OK**.
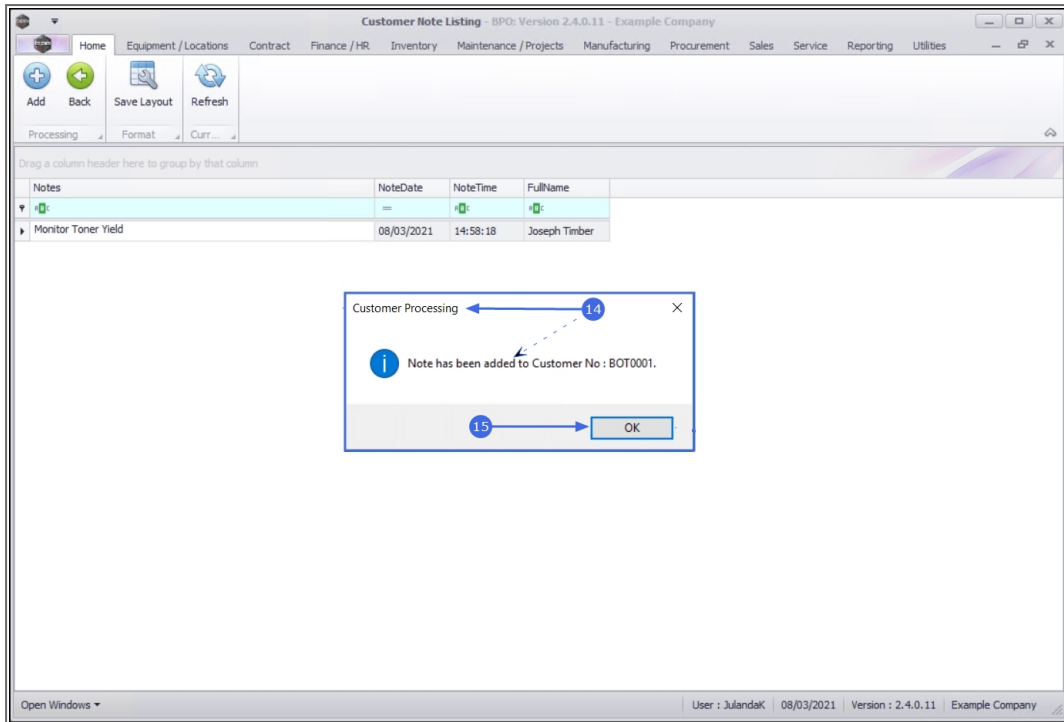
16. The Customer Note can now be *viewed* in the *Customer Note Listing* screen.

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