SALES

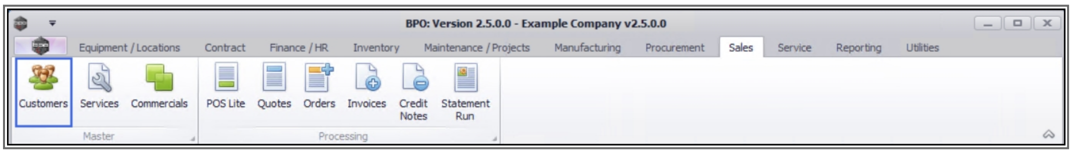
CUSTOMERS – NOTES

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

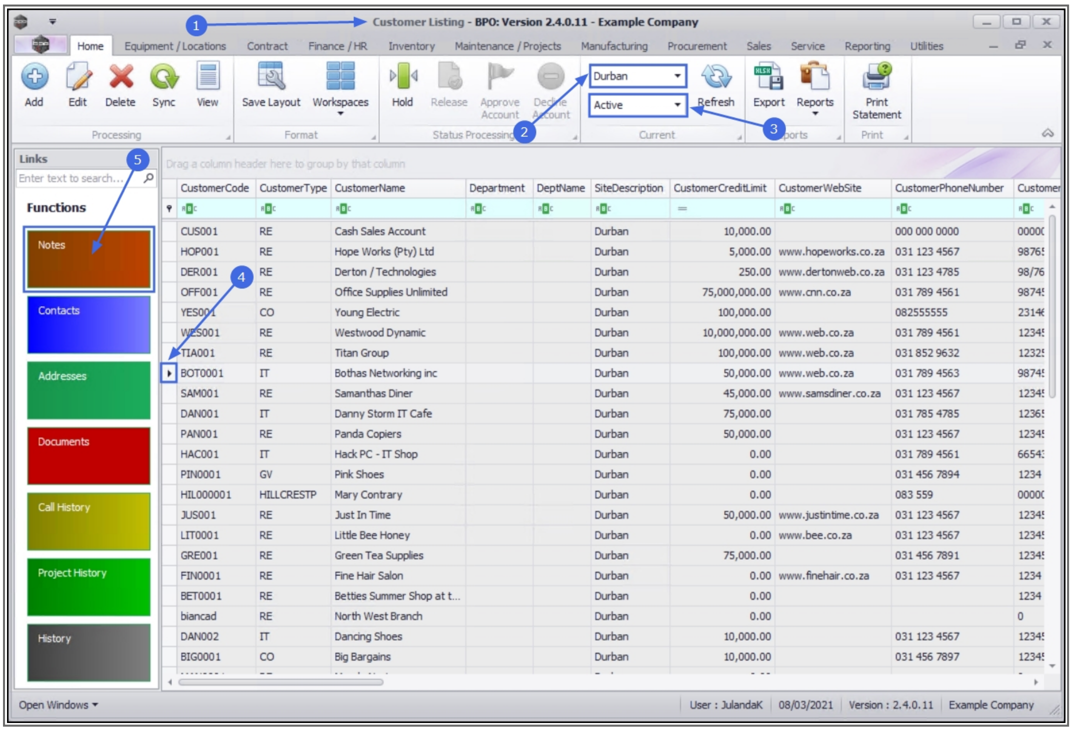
- **Call Listing**
- **View Customer**
- **Call Maintenance**

> Notes cannot 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.

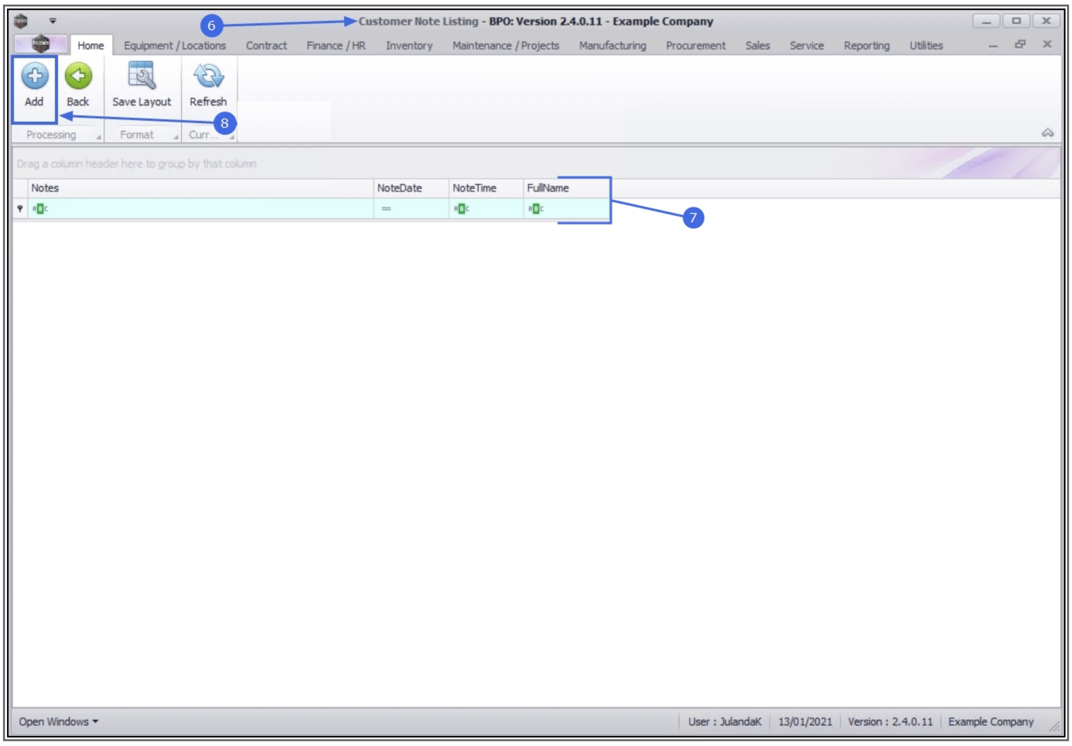


6. The ***Customer Note Listing*** screen will be displayed.
7. Any notes that have already been created for the customer, will display in this screen

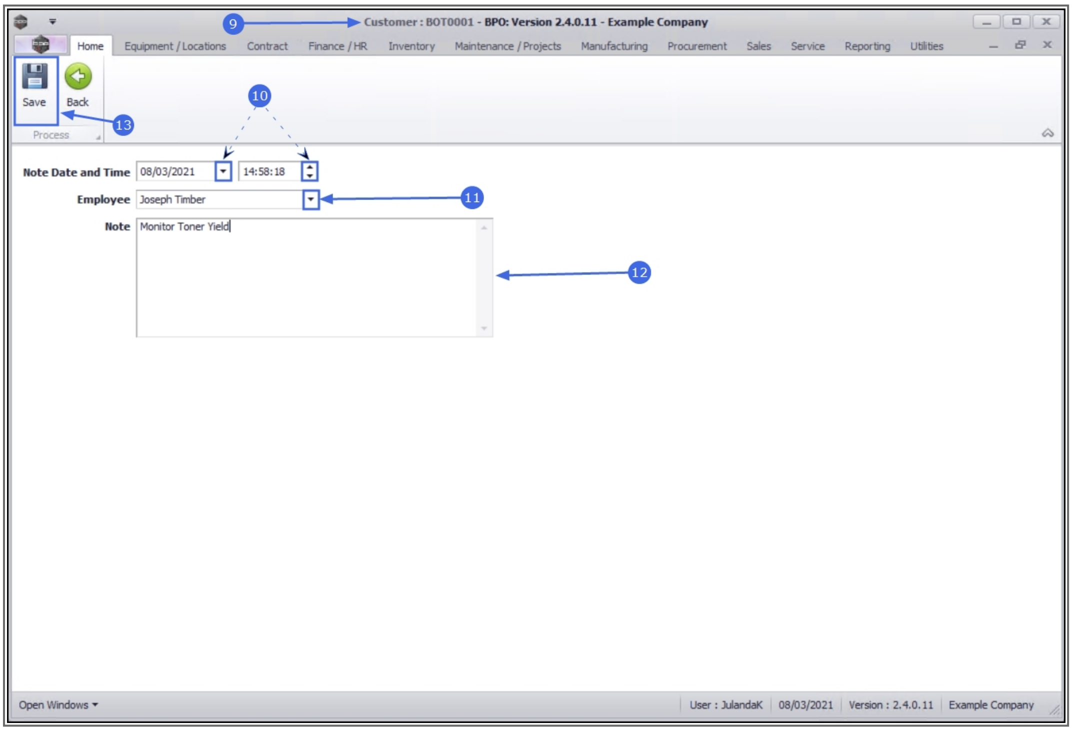
ADD CUSTOMER NOTE

8. Click on ***Add***.

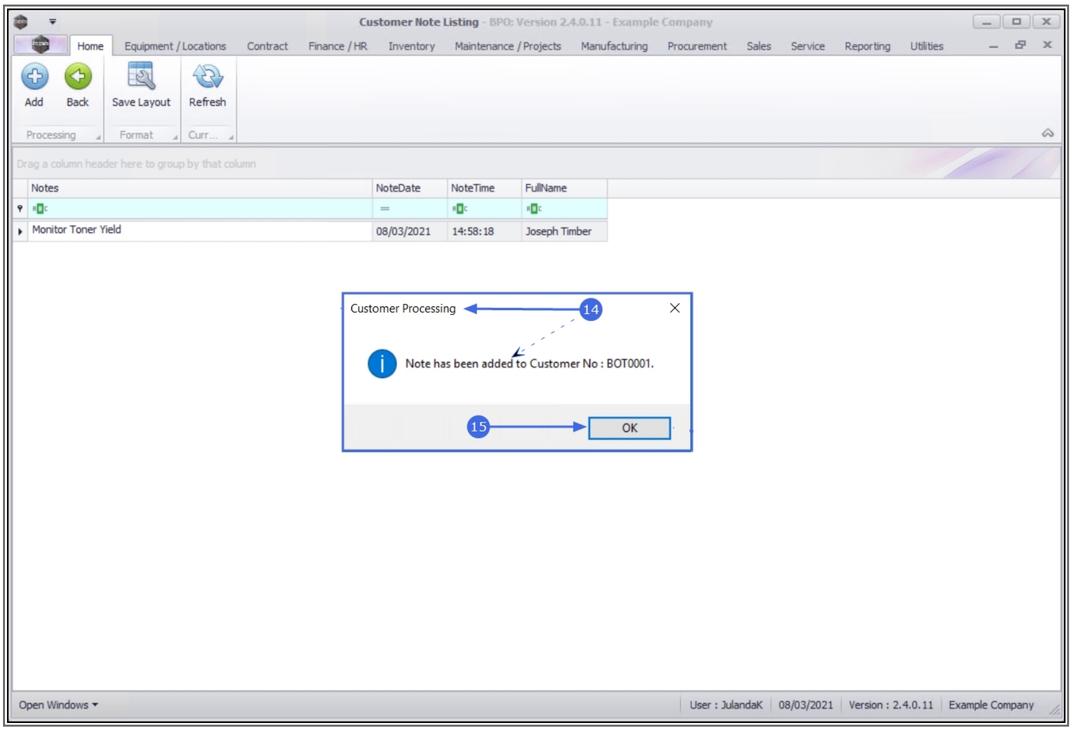
> Short cut key: ***Right click*** to display the ***Process*** menu list. Click on ***Add***.



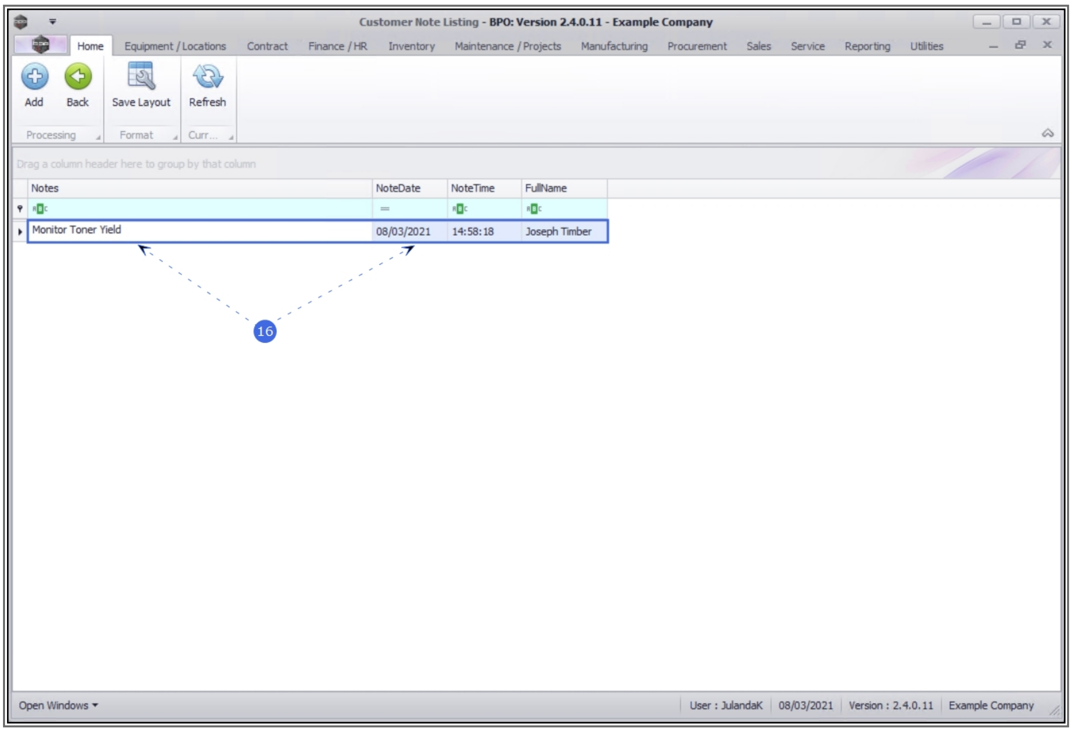
9. The ***Customer: [customer code]*** screen will be displayed.
10. **Note Date and Time:** This will be auto populated with today's date and time of input.
    - **Date:** Type in or click on the down **arrow** to use the calendar function to select an alternative date.
    - **Time:** Type in or use 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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