We are currently updating our site; thank you for your patience.

SALES

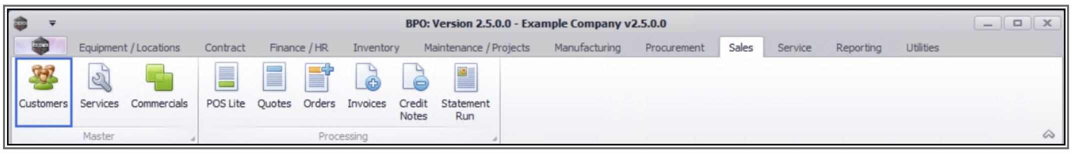
CUSTOMERS – NOTES

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

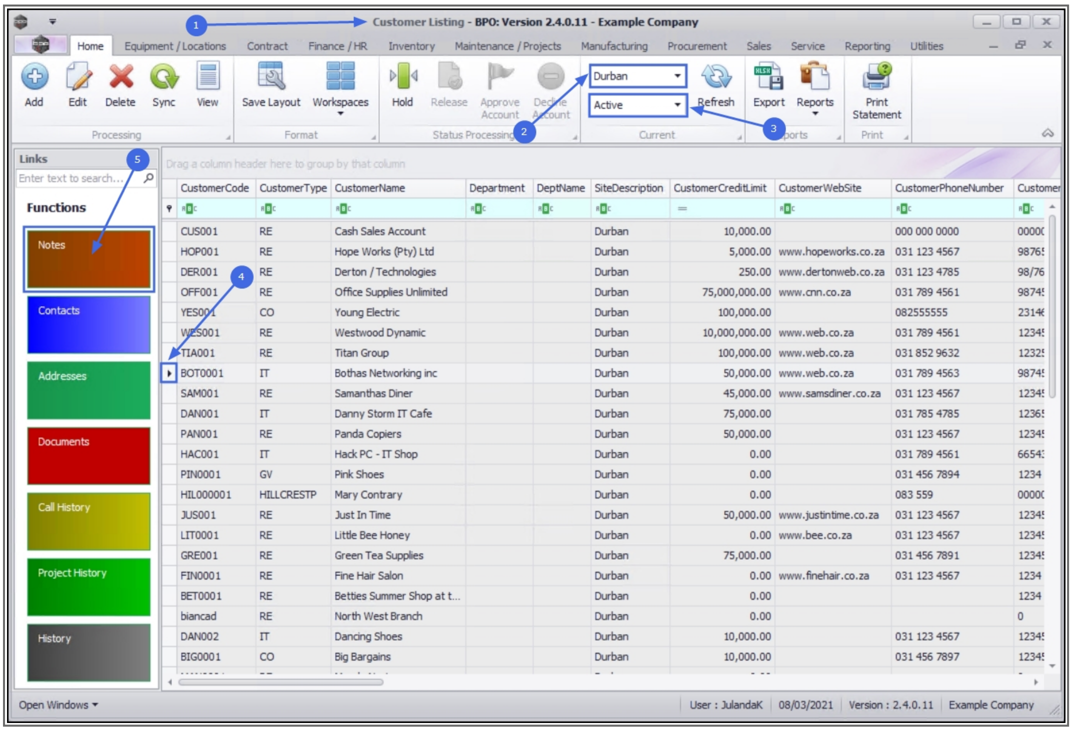
- **Call Listing**
- **View Customer**
- **Call Maintenance**

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.

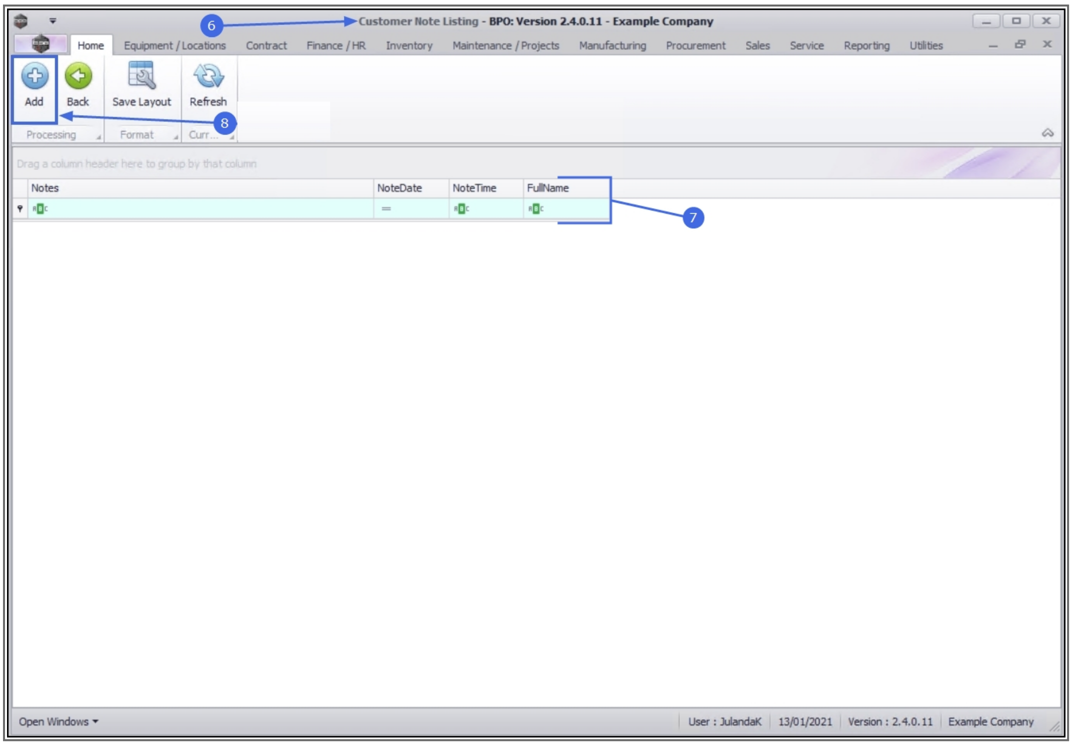


6. The **Customer Note Listing** screen will be displayed.
7. Any notes that have already been created for the customer, will display in this screen

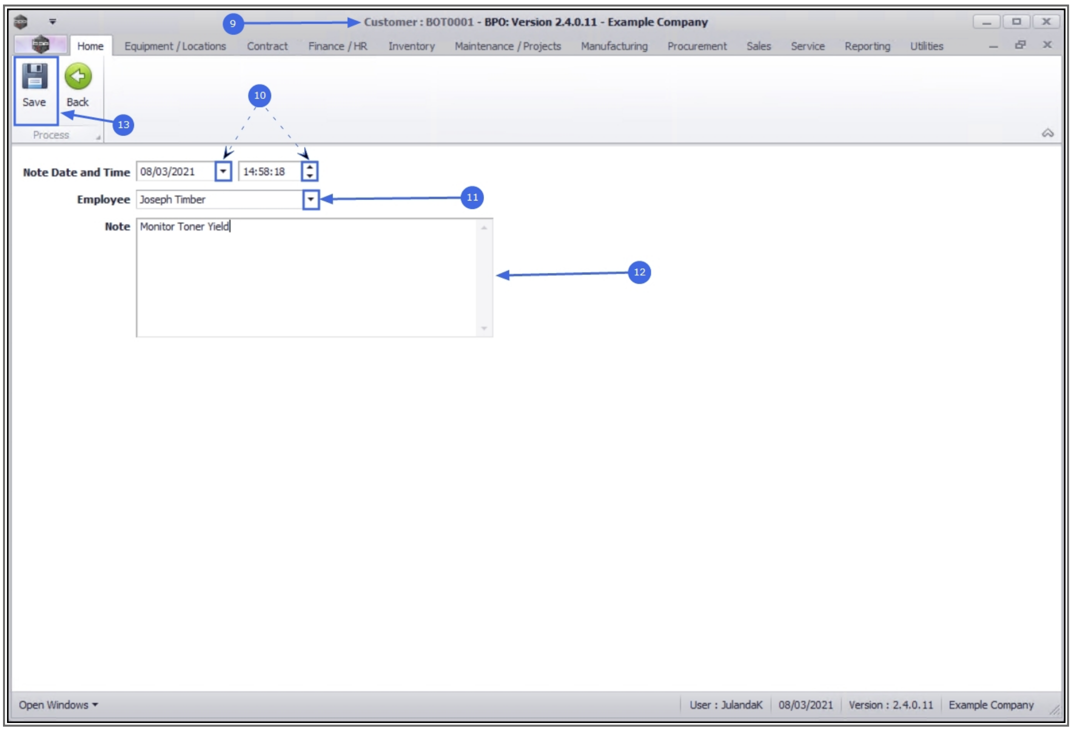
ADD CUSTOMER NOTE

8. Click on **Add**.

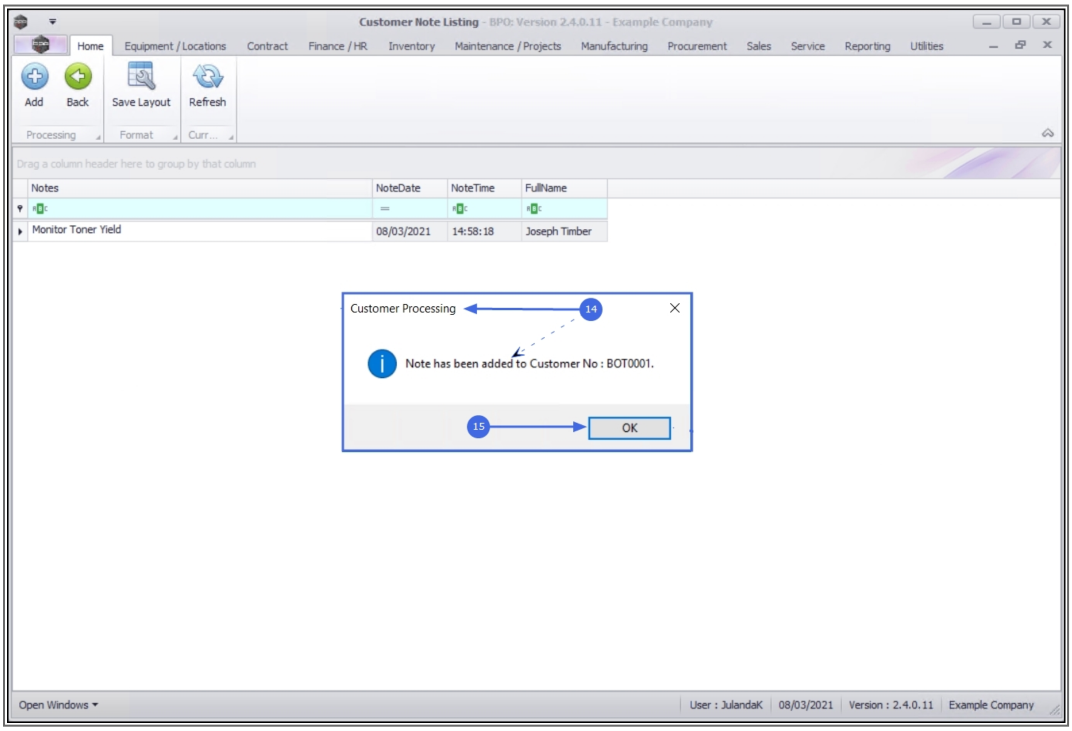
> **Short cut key: Right click** to display the **Process** menu list. Click on **Add**.



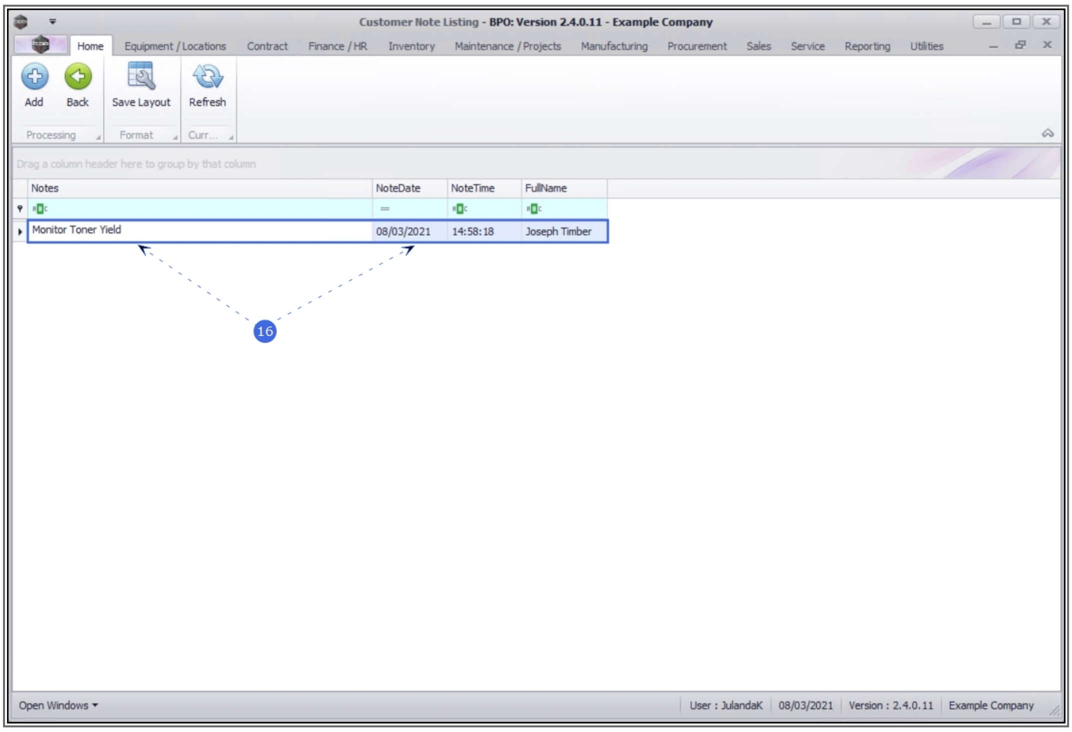
9. The **Customer: [**customer code**]** screen will be displayed.
10. **Note Date and Time:** This will be auto populated with today's date and time of input.
    - **Date:** Type in or click on the down **arrow** to use the calendar function to select an alternative date.
    - **Time:** Type in or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