Add Customer Notes

Last Modified on 04/28/2022 10:16 am EDT

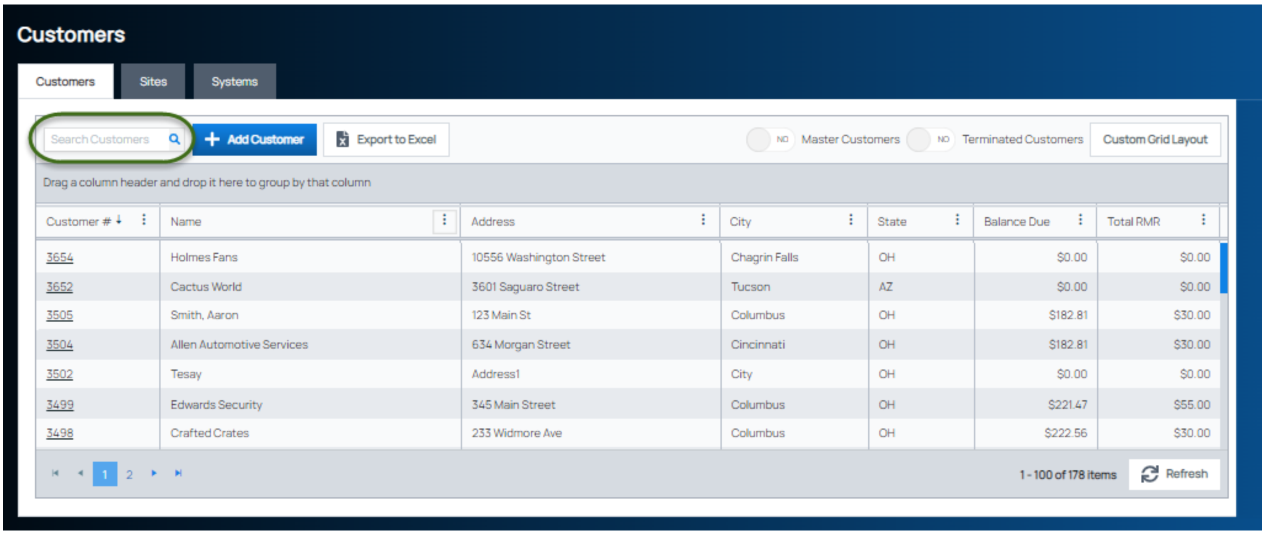
Notes can be added in several customer related areas of the application including:

- Customers
- Sites
- Systems
- Work Orders

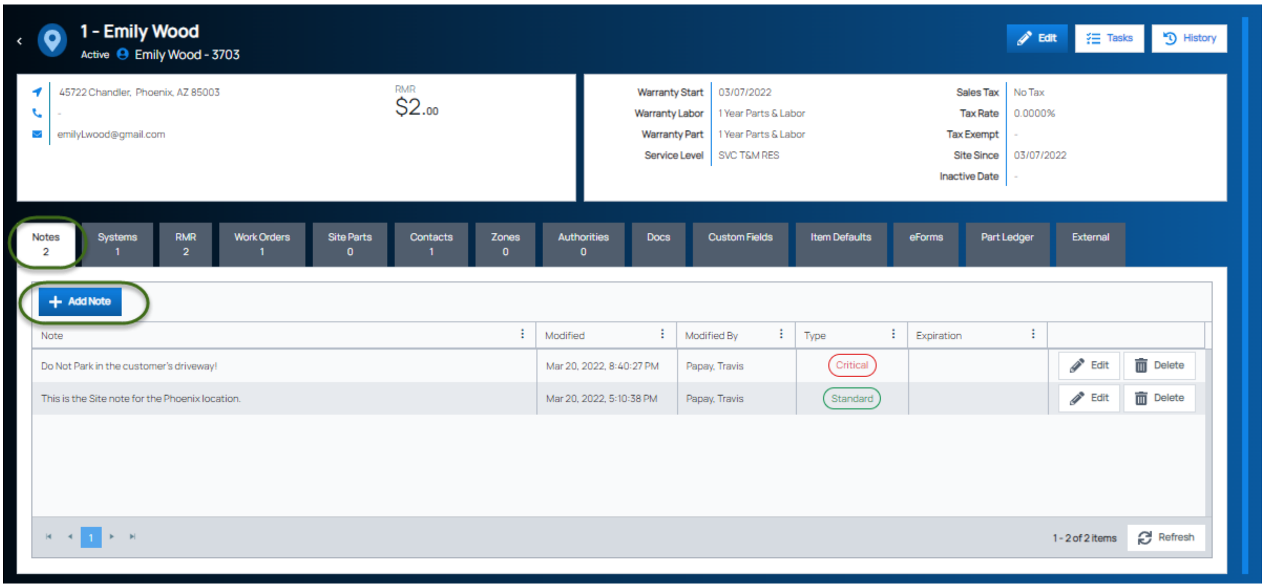
When entering a Note, it should be entered on the entity that is most logical. From example, billing related notes should be saved at the Customer level, whereas system related notes should be saved at the System level.

To add a Customer Note, you must first access the customer record. From the main menu, arrive at the Customers list with this path: Accounts Receivable> Customers.

The Customers list will be displayed. Locate the customer in the list, and then click on the hyperlink in the Customer # column to open the customer record.



The Customer record will be displayed. Click on the Notes tab, and then click on the Add Note button.



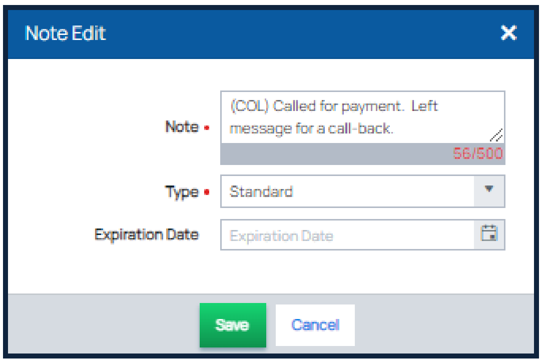
The Note Edit form will be displayed. Each data entry field will be described below.

Data Entry Fields

Data entry fields preceded with an asterisk are required.

- ***Note** – Type in the note. Maximum of 500 characters allowed.
- ***Type** – Make a selection from the drop-down list – either Critical or Standard. You may save multiple notes with the Critical Type.
  - Critical Type – If the note is saved with this type, whenever the Customer record is accessed, this note will pop-up on the page.
  - Standard Type – This type is selected for non-critical notes.
- **Expiration Date** – If you selected Critical in the type field, and you want this note to stop popping-up after a certain period of time, then enter the end date for the critical note.

When entering notes, you may want to develop a coding system to identify the purpose of a note. In our example below, we have preceded the note text with (COL) to identify this note is collections related. When filtering the notes list it is easier to find all collection notes.



When finished filling in the form, click the Save button at the bottom of the form.