

Customer Notes Maintenance

1. ACCOUNTS RECEIVABLE > 1. DATA MAINTENANCE > 6. CUSTOMER NOTES

Providing that the note types have previously been set up using the menu option **9. SYSTEM UTILITIES > 3. SYSTEM SETUP > 1. ACCOUNTS RECEIVABLE > 3. NOTES PARAMETERS**,

free-form notes may be added for any customer currently on file.

There are a total of 6 note types, spread across two styles: **reserved** and **non-reserved**, with a maximum number of reserved note types of three (3). In future releases of the software, reserved notes will be accessible with hot/function keys from inside various processes (example: invoicing / cash receipts etc.)

A **TAB** to search is available from the customer number field. Only A/R customers are available for notes, not VIP customers. The note is date and time stamped and the user is prompted to classify this note with a particular type.

When sorting the order of note types displayed during maintenance, reserved notes are listed first, in the order in which they have been entered in the parameter file. After reserved types, numeric and then upper case alphabetic types are listed, and finally lower case alpha types. Reserved note types are indicated with after the code.

There are 6 text fields available for the free-form note, contained on three lines numbered **[1]** **[2]** and **[3]**. The first line has 2 fields; the first is 40 characters in length, followed by 36 characters in the second field. The same applies to the next 2 lines. Should the note extend further than the number of characters available in any one field, the note will automatically be wrapped to the next one.

Word wrapping is done on a letter by letter basis, meaning that a single word may be split across two lines. No hyphenation of the split word is done. Pressing **[enter]** anywhere on a line will advance to the beginning of the next section, either on the same line or on the next. When the note text has been completed, press **[enter]** to complete the field, then **[F1]** to accept.

Changes are allowed at the **any change?** prompt. Entering the line number for change will bring the user to the beginning of the line. Changes are ALL **overtyp**e mode, meaning as soon as typing begins in a field/section, what is currently written will be over-written. If the first field of the line requires no change, pressing **[enter]** will advance to the beginning of the second field/section on

that same line. Changes to notes are also available from the change notes menu option. A note that has been assigned to a reserved type may still be deleted.

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