Customer Notes

Customer Notes

New programmes have been added to **accounts receivable** for adding and inquiring into **free-form notes** for a customer. The inquiry into customer notes has also been added to the **sales desk** menu.

There is 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). Customer notes are date and time stamped during entry and then assigned to a particular type. There may be many notes of the same type attached to the same customer.

The use of “A” type notes will display automatically as a customer is selected in the invoice screen.

The other reserved or default note types are “B” and “C”.

Creating a new Note type

Use the menu option **Utilities à System Setup > Accounts Receivable à note parameterS** to add (example) a type [**n**] with a description of **nsf**. The singe character note type may be alphabetic or numeric.

Adding notes to customers

To add a note to a customer, use the menu option **accounts receivable > DATA MAINTENACE > customer notes** (add). 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 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. 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.

Viewing/Adding Customer Notes

Several menu options are available to view and maintain customer notes:

Accounts Receivable > Inquiry Functions > Customer Analysis
Accounts Receivable > Inquiry Functions > Customer Notes Inquiry
Sales Desk > Customer Queries > Customer Analysis
Sales Desk > Customer Queries > Customer Notes
Sales Desk > Invoicing – Press Shift F11 from the Customer field or from the Line Type
Accounts Receivable > Transaction Processing > Cash Receipts Processing > Cash Receipts Input – Press F11 after the Customer is entered

Enter the customer number or use the search option to find the customer then select a note type or press enter to view all notes for the customer.

Notes are displayed in date sequence with the most recent first

Print Customer Notes on Invoices

The ability to include Customer Notes has been added to the invoice print. This requires that a Note Type be added with the setting to Print on Invoice = Y. These notes will print in the body of each invoice for the customer.

Note Type Maintenance

A new Note Type must be added to the system to identify which notes are to be included on the invoice. This is done using the menu option **Utilities > System Setup > Accounts Receivable > Note Parameters**. Use “1. Add Type” and use a letter or number as a code (eg “P”), assign a description and set Print on Invoice to “Y”.

Customer Note

Notes for the customer can be added through **Accounts Receivable > Data Maintenance à Customer Notes** or through the Invoice Screen using Shift F11 from the “customer #”. When adding the note use the type setup above and enter the text to be printed on the invoice.

> The invoice will only print the first 40 characters of each line of the note text

> If multiple print type notes are setup for a customer, all of them will print on each invoice.

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