Customer Activity Notes

Using Customer Activity Notes provides a safe and secure place to keep detailed information related to your customers.

These notes can be categorized, given a priority number, and they can even create follow-up reminders.

In this course, we will explore the setup of Customer Activity Notes as well as the Adding, Viewing, Editing, and Closing processes.

Prior to using Customer Activity Notes, there are several Option Configuration settings that will need to be reviewed.

A full explanation of those along with related Security Bits are available in the documentation for this course.

You can download this file here, in the Course Materials section.

The next step is to set up the appropriate Note Types for your business.

A Note Type is used to organize the category of information that you are recording.

You can have up to 35 different note types.

They can be the letters A through Z or the numbers 0 through 9.

Note Types can be added to, deleted, or modified at any time.

Access the Activity Notes Viewer from the Accounts Receivable section of your Eagle browser.

Or from the MCR Go To menu.

Select Customer Activity Notes under the Viewers section.

Open the Miscellaneous menu and choose Number 6, Maintain Note Types.

You can Change or Delete the two default Note Types: Credit and Sales if they do not fit your business model.

To add a Note Type, press the Add button then select the Letter or Number you want to use.

In this example we will use the letter D to represent Delinquency notes.

Enter a description and press OK.

Highlight the line and press Change to alter the description.

Press OK.

To Delete a Note Type highlight the line again, and press Delete.

You can add an Activity Note from the Activity Notes Viewer or from the Accounts Receivable Go To menu.

When adding from this location you must select a customer in MCR first.

From the Activity Notes Viewer, click Add Note to launch the dialog box.

The Note field allows up to 30,000 characters so you have plenty of room to type your message.

Enter a Follow Up Date or leave this field blank if the text is informational only.

Set Send Reminder to Yes so the item will be displayed in the Alerts Viewer.

Review the Training on Demand courses, Setting Up Eagle Alerts and Using Eagle Alerts for more information on using this function.

Each note entered can have a different Note Type and Priority.

You determine the Priority organization and can use 1 as the highest priority number or use 9 as the highest.

These numbers display in the Priority column in the viewer.

Once all the information is added, press OK to add the Note.

An audit trail is created for each Customer Activity Note, which includes the Date, Time, User and Terminal the note was added on.

Customer Activity Notes are assigned a number by the system starting with number 1 for each customer.

The Status Code identifies the Note as Informational only, Open, Closed, or Deleted

The Customer Activity Notes Viewer has the same Eagle filtering and sorting capabilities you are familiar with.

Use any of the available Look Up criteria, here, to limit what appears in the grid.

Double click on any line in the grid to see detailed customer information and history.

The results can be printed by clicking the Print button at the top of the screen or exported by pressing the link on the bottom right.

The Expand All hyperlink shows all text included on the note

Once the notes have been Expanded, you can compress them again by pressing the Refresh button.

To View or Edit Customer Activity Notes highlight the line and use this link.

Make any needed changes to the Note and press OK to save them.

Customer activity notes follow the customer record, so if an Account Number is changed those notes will follow.

However, if a customer record is deleted, those notes are also deleted.

If a job account is deleted, the related notes attach themselves to the main customer record.

When an Open note no longer applies or is no longer needed, you can set its status to Closed.

The Close Note link allows you to leave a Final Comment or to Delete the note if you no longer want it associated with the customer record.

Notes cannot be Deleted here until they are Closed.

You can still view Deleted notes by selecting the All + Deleted status and refreshing the grid.

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud, hosted, or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, connect with Epicor or visit www.epicor.com.

Corporate Office
804 Las Cimas Parkway
Austin, TX 78746
USA
Toll Free: +1.888.448.2636
Direct: +1.512.328.2300
Fax: +1.512.278.5590

Latin America and Caribbean
Blvd. Antonio L. Rodriguez #1882 Int. 104
Plaza Central, Col. Santa Maria
Monterrey, Nuevo Leon, CP 64650
Mexico
Phone: +52.81.1551.7100
Fax: +52.81.1551.7117

Europe, Middle East and Africa
No. 1 The Arena
Downshire Way
Bracknell, Berkshire RG12 1PU
United Kingdom
Phone: +44.1344.468468
Fax: +44.1344.468010

Asia
238A Thomson Road #23-06
Novena Square Tower A
Singapore 307684
Singapore
Phone: +65.6333.8121
Fax: +65.6333.8131

Australia and New Zealand
Suite 2 Level 8,
100 Pacific Highway
North Sydney, NSW 2060
Australia
Phone: +61.2.9927.6200
Fax: +61.2.9927.6298