Using Notepads Transcript

ANDREW
Sounds good, I'll make a note.

ROBERT
What was that about?

ANDREW
Oh! That was a customer, they want us to follow up on a quote in a couple weeks. I'm just writing a note, so we remember!

ROBERT
Okay…. Did you know that we can write a note right in the system? We don't need to use a physical one that could get misplaced. You can even set it up with a due date and a follow up requirement to make sure it doesn't get overlooked.

ANDREW
Really? That sounds slick. You should show me how.

ROBERT
Certainly!
Pick a topic and we'll get started!

Topics

- Overview
- Viewing Notes
- Customer and Supplier Notepad Notes
- Document Notepad Notes

Overview

Notepads can be connected to a Customer, Supplier, or Document.

When linked to a Customer or Supplier, you can access the notepad from within their properties.

When notes exist, the tab is shown with an information icon and the number of notes on the current page in brackets.

The notes on file are listed in the main body of the window according to the filter settings.

Some notes are automatically entered based on processing that has occurred.

For example, a Follow up note added to a Quote is added to the customer's Notepad.

Likewise, if you are using the CRM module, when the Quote is accepted or rejected, an Event type note is created.

Notes that have been flagged for follow up are shown with a red flag.

This is a visual reminder this note has outstanding issues.

Those without a flag have been completed or were not tagged for follow up.

Cases are also listed with notes and appear in bold print.

Closed cases are shown with a strikethrough and the folder icon has a checkmark.

The folder icon is open for cases that are still in progress.

For more information on these, refer to the Training on Demand topic Using Notepad Cases.

Viewing Notes

The All button shows both notes and cases.

To limit the view to only Cases, click that button.

You can refine the list of notes to display using filters.

The first allows you to specify a note Type to view.

System Notes, Appointments and Events are system-defined and cannot be changed or removed.

Next you can select to view notes for a specific customer contact or dated This month, Last month or Last 6 months.

Finally, you can enter a document number in this box to search for notes where it has been referenced in the Subject or Notes field.

Once the filters are set, click Go or press Enter to perform the search.

The Preview icon lets you change the display to view more information in the grid.

To return to the previous display click the icon again.

This icon is used to reveal the Group by box area.

When shown, you can drag and drop any column heading into this spot to group the notes by that topic.

The Calendar option is linked to notes that have follow up dates entered. Instruction on how to use the Calendar is covered in a separate Training on Demand course.

The processing options are found in the bottom right of the Notepad.

Use these to Add a note, start a New Case, view the Properties, Remove or Print a note or case.

Customer and Supplier Notepad Notes

The procedure for adding a Notepad note is the same for customers and suppliers.

We will add one for a customer.

Another way to access a Notepad is from the Customers View right-click menu.

Using this method, you have two options. Open the notepad or go directly to the form for adding a new note.

Select the add option.

The Customer's name is automatically filled in along with the current date and time.

Enter a Subject that describes the purpose of the note.

This is displayed on the Notepad grid.

Select the note Type from the drop-down.

For an Appointment note, you can then enter the person that will attend the meeting.

Enter a partial name or click on the For box to select from the list of users.

When applicable, assign a Contact to the note.

Set the appointment start and end date and time.

There are several tabs available for entering additional information.

Use the Note tab to enter a more detailed description.

Formatting options are available to change the font style, size, color, etc. of the text.

When finished, click OK to complete the note.

To view the entry, from the Customers View right-click menu, select Communicate, and then Open Notepad.

The details of the note are shown on the Customer's notepad.

Document Notepad Notes

A notepad can be linked to many documents including: sales orders, call off orders, credit notes, purchase orders, and supplier invoices.

You can access the Open Notepad option from the right-click menu for the selected document.

Or, you can open the document and then choose the Show Notepad icon from the toolbar.

This notepad is specific to this customer and document number.

Select to Add a note.

The fields for Date, Subject and Contact are the same as a Customer or Supplier notepad entry.

The Type selection however is limited by a setting that controls which documents can be applied to it. This is determined when the Notepad Types are added in System Manager.

For example, Sales Notes are the only Type that can be applied to Sales Orders.

For this note, we'll set a Follow up and then enter the date, time and who is responsible.

Finally, further description for the note is entered and then it is closed by clicking OK.

When the note is listed on the notepad, it has a red follow up flag attached.

To clear the flag, you must re-open the note Properties.

You can enter further text to describe what occurred and then check the Completed box.

The follow up flag is no longer displayed with the note.

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