

Customer - Adding/ Editing Customer Notes
AV Ref # 573

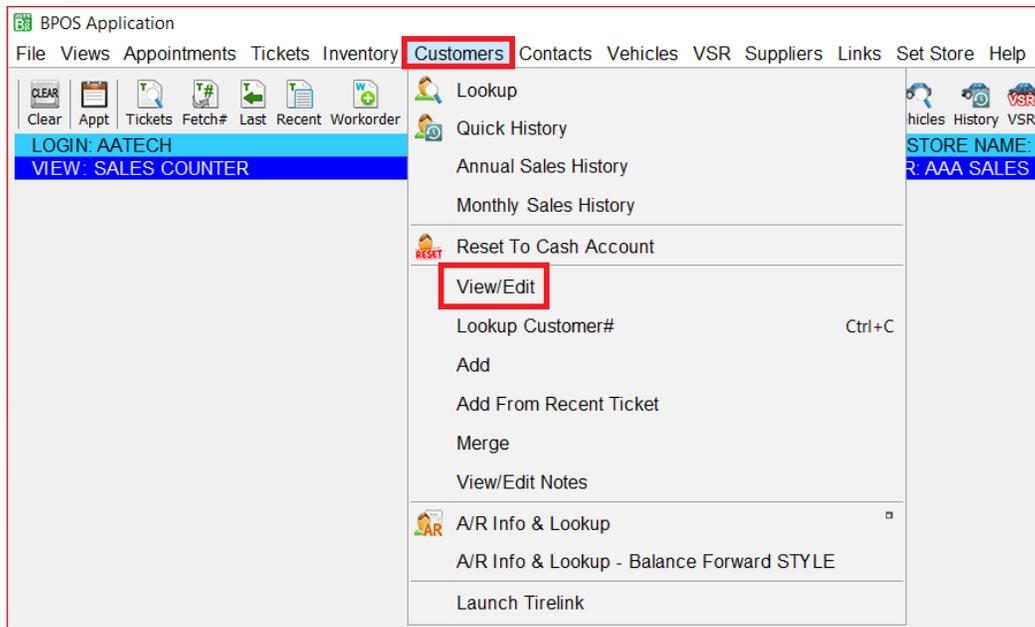
There is also a video showing how to perform this function:
Customer - Adding/ Editing Customer Notes
(2:52) – AV Ref# 390

About:

Sometimes, you may need to add notes to a customer’s file. It could be personal information like birth dates, spouse information or credit history. Or it could be information that you want your employees to see every time they create an invoice for this customer. BPOS provides 26 pages of password-protected of notes. You can allow your employees access to all, some or none. You also have 4 lines of notes available directly on the customer’s file which you can set to “flash” which forces your employees to acknowledge the notes prior to building a ticket, or simply highlights at the start of a ticket.

How to Add Customer Quick Notes To Customer File:

1. Click on **Customers** → **View/Edit:**



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2. If your customer is already listed, proceed to step 3. If you need to your customer, click on the binoculars beside **Customer #** field. Find your customer & double-click on them to make them the Active customer.
3. Add your notes to the Notes block. Click the Save button at the bottom when you are finished. Note: Placing an “@” symbol at the beginning of your notes will either highlight or force acknowledgement on the invoice screen from your employees when they are creating a work order (depending how your system is configured – examples shown below). This is especially helpful when the notes are something you need to make sure everyone sees before building tickets:

Customer View & Edit

Contact Info Account Info Other Info Pricing A/R Info Misc

Customer # 70825

Name AAA SALES

Short Name AAA

Address 1542 STATESVILLE RD

Address2

City CORNELIUS State NC Zip 28071

Contact Name

Type	Phone/Email	EXT	Text Domain	Comments	Priority
PHONE	(704) 895-2780				Primary
EMAIL	tech@aasys.com				Primary

*** Right-Click Table To Add/Edit/Delete Customer Contact Info (Phone, Email, Etc.)... ***

Track VSR Yes

Send VSR Postcards Yes

Notes @THIS CUSTOMER ALWAYS GETS A 20% DISCOUNT ON ANY AND ALL WORK HE HAS DONE.

Clear/New Discard Changes Save Cancel Help

Depending on which way your system is set, using the @ will either produce the following:

File Views Appointments Tickets Inventory Customers Contacts Vehicles VSR Suppliers Links Set Store Help

Clear Appt Tickets Fetch# Last Recent Workorder Quote Inventory TireBrands RESET Customers History Contacts Vehicles History VSR CARFAX ServiceCAT VSOC Inspectio

LOGIN: AATECH STORE NAME: HITS DEMO STORE #1

VIEW: SALES COUNTER CUSTOMER: AAA SALES [70825] VEHICLE: STORE: 6

Ticket View/Edit (1680612)

Main Line Items Appointments **Customer Info - Review Required!** Vehicle Info Payments

Ticket # 1680612 Date 07/11/2016 Salesrep i - CALL CENTER Tax Taxa... ST #1 OPEN WORK ORDER

Cust # 70825 Short Name AAA Parking Space Route#

Name AAA SALES

Address 1542 STATESVILLE RD

City CORNELIUS St NC Zip 28071

Tag# Year Make Model Mileage 0

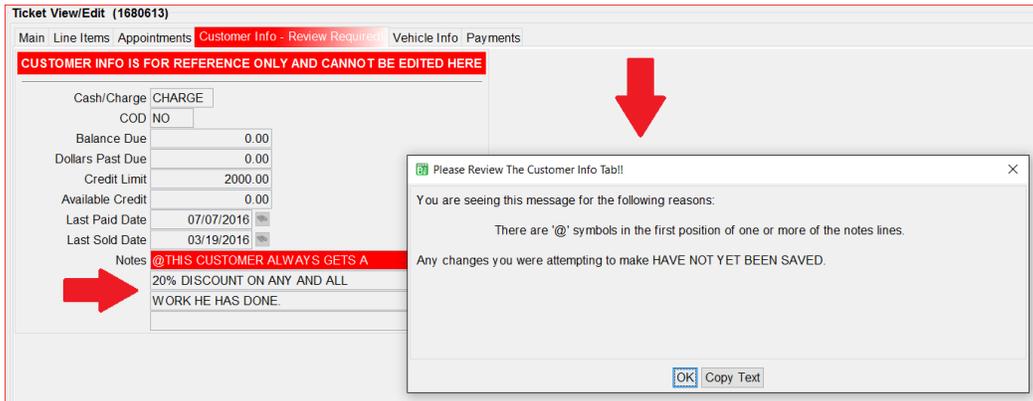
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HITS Technical Support: Mon-Fri : 8:30am-4:30pm EST

Phone: (800) 422-2032 **Email:** tech@aasys.com

Note: For after-hours emergency support - Use the 24/7 number provided with your software

Or:



The screenshot shows a software interface for 'Ticket View/Edit (1680613)'. At the top, there are navigation tabs: 'Main', 'Line Items', 'Appointments', 'Customer Info - Review Required!', 'Vehicle Info', and 'Payments'. Below the tabs is a red warning banner that reads 'CUSTOMER INFO IS FOR REFERENCE ONLY AND CANNOT BE EDITED HERE'. To the left, there is a form with fields for 'Cash/Charge' (set to 'CHARGE'), 'COD NO', 'Balance Due' (0.00), 'Dollars Past Due' (0.00), 'Credit Limit' (2000.00), 'Available Credit' (0.00), 'Last Paid Date' (07/07/2016), and 'Last Sold Date' (03/19/2016). Below these fields is a 'Notes' section containing the text '@THIS CUSTOMER ALWAYS GETS A 20% DISCOUNT ON ANY AND ALL WORK HE HAS DONE.' A red arrow points to the '@' symbol in the first note. A dialog box is open in the foreground with the title 'Please Review The Customer Info Tab!!'. The dialog contains the text: 'You are seeing this message for the following reasons: There are '@' symbols in the first position of one or more of the notes lines. Any changes you were attempting to make HAVE NOT YET BEEN SAVED.' At the bottom of the dialog are 'OK' and 'Copy Text' buttons. Another red arrow points to the 'OK' button.

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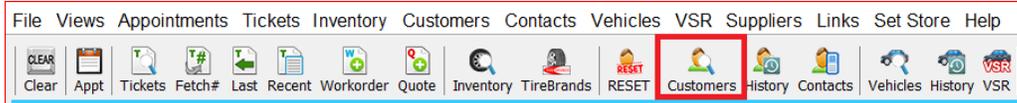
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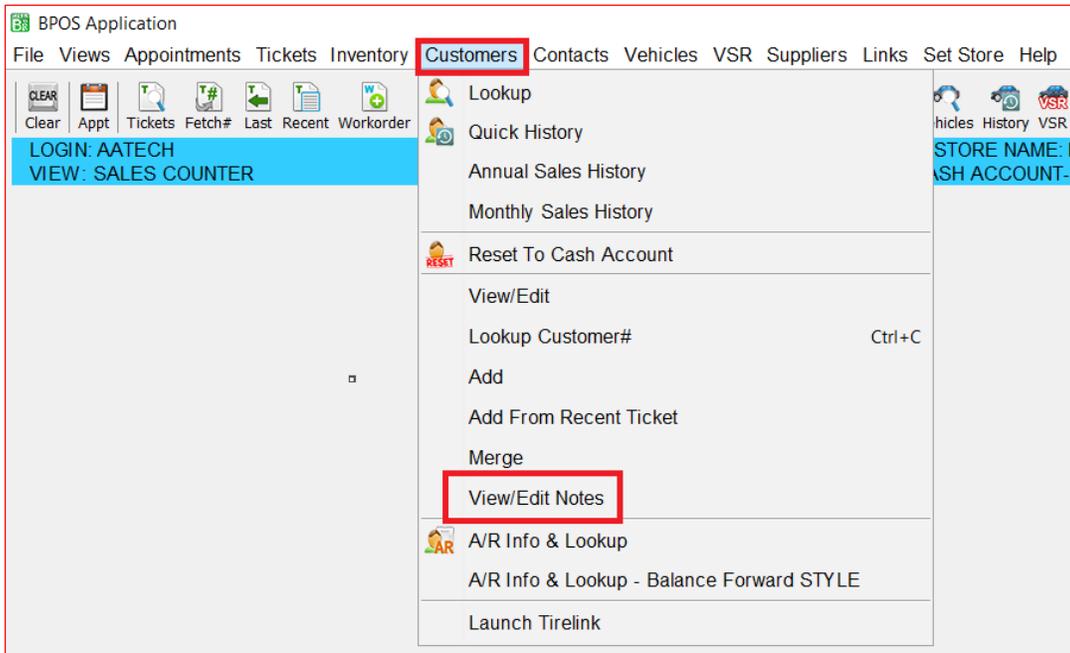
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How to Access 26 Pages of Extended Customer Notes:

1. Click on the **Customers** button on your toolbar. Find your customer and double-click to make them the Active customer:



2. Click on **Customers** → Click on **View/Edit Notes**:



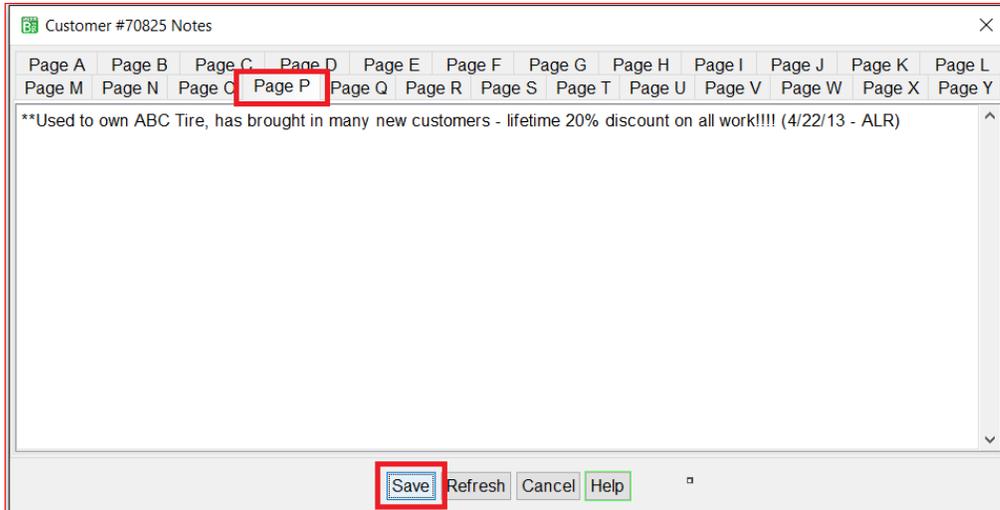
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3. Add your notes to your selected page and click **Save** at the bottom. Anyone with password permission will be able to view and/or edit. In the below example, we have added notes to Page P. In the example below, we do not have access to Page Z at all:



Option Settings:

Customer notes provides 26 pages of notes available, A through Z. Please note that to control a user's access to the notes, you will set the proper password switch to the last page you want the user to be able to access. For example, you can give a user access through letter W, which blocks them from note pages X, Y and Z. Then you can use the blocked pages for sensitive information a regular user would not need to access.

****NOTE** - Users must have password permission to read and/or the View/Edit Notes page (P53). P54 controls the degree of access. To set flashing notes to highlight versus pop-up, make edit in View/Edit Default Settings → Invoice View/Edit. If you need to give a user password permission to perform this function, please contact your system administrator.

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