Customer Notes in Point of Sale

How to Read and Write a Customer Note from the POS Header Screen

1. Enter Customer ID on order header screen. If notes exist for the customer, "**READ NOTES**" displays at bottom of screen.
2. Press **<F12>** & **N** (cust Notes) to read the customer notes. If multiple note records exist, use **<Page Down>** key to view them.
3. To change or add information on a note, use arrow keys to move cursor. Make changes and add lines of text as needed. (Function keys available for editing are displayed at the bottom of the Notes Editor box.)
4. Press **<F10>** to save. (If your salesperson ID is not set up to "write" notes, a message displays indicating you are 'not allowed to add or change memos.')
5. Press **<F12>** to exit from the notes screen & return to the order header.

How to Create a "Reminder" Note to POP UP Each Time You Look at an Existing Order or Start a New Order for a Specific Customer

1. Enter Customer ID on order header screen.
2. Press **<F12>** & **N** (cust Notes). If notes already exist for the customer, press **<F9>** to **clear the notes screen** so that you can write a new note/memo. (Pressing <F9> simply clears the screen – it does not delete the existing note.)
3. **Change the "Level" from 9 to 0.** (Level 0 tells Tag-n-Trak to "pop up" the note automatically.)
4. Press **<Enter>** past the **"Msg:"** field to leave it blank.
5. Enter the note you want to "pop up" automatically. A sample is shown below.

```
+-----------------------------------------------------------------------+
| NOTES EDITOR  HOMEBLDR  HOME BUILDERS INC.          Level:  0  Msg:   |
|                                                                       |
| HOMEBLDR USES FROSTED BULBS ONLY._____________________________________|
| ______________________________________________________________________|
| ______________________________________________________________________|
| ______________________________________________________________________|
| ______________________________________________________________________|
| ______________________________________________________________________|
| ______________________________________________________________________|
|                                                                       |
| INS=TOGGLE INSERT  TAB=WORD RIGHT  F3=SLSMAN  F7=INS LINE  F8=DEL LINE |
+-----------------------------------------------------------------------+
```

6. When finished, press **<F10> to SAVE** and then **<F12>** to exit the customer notes screen. The next time a salesperson starts a new order OR looks at an existing "L" type order or Quote for this customer, the reminder note (Level 0) will display.
7. The note "pops up" *after* the salesperson presses <Enter> past the order type "L" or "Q." **After reading the note, the salesperson must press <F12> on the note screen to proceed to the line items screen**.