Customer Notes for Fax, Email and Tax Exempt ID

Overview
This document describes how "Customer Notes" can be used for Fax numbers, email addresses and Tax ID numbers for customers who are tax exempt.

1. Select **Accounts Receivable** from Main Menu and then **Customer Master.**

2. Enter the Customer ID for the customer you wish to add a fax number, email address or tax exempt ID number.

3. Press **F12** and **N** for cust **N**otes.

4. **SALESMAN:** Enter your two-digit salesperson password.

The Notes Editor screen will display with the customer's ID and name.

```
+----------------------------------------------------------------------+
| NOTES EDITOR  ANDER      ANDERSON BUILDERS           Level:  5  Msg:  _ |
|                                                                      |
| _____ |
| _____ |
| _____ |
| _____ |
| _____ |
| _____ |
| _____ |
|                                                                      |
| INS=TOGGLE INSERT  TAB=WORD RIGHT  F3=SLSMAN  F7=INS LINE  F8=DEL LINE |
+----------------------------------------------------------------------+
```

If the customer has no existing notes on file (or if the salesperson "permissions" do not allow access to existing notes), the Level defaults to the "A/R Note level" in the Salesperson record, the Msg field is blank and the seven note lines are blank. If the customer has existing notes, the first note that the salesperson has access to will display.

The A/R Note level field in the salesperson record determines the level of notes a salesperson is allowed to read and/or write for a customer. In the example above, the Level defaults to 5 because the Salesperson Record "A/R Note level" is 5. A salesperson with a level of 5 can read notes at a level of 0 through 5, but cannot read notes at a level of 6 through 9. An explanation of the Salesperson A/R Note Access & Level is below.

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Salesperson Record "A/R Note Access"

W - Allows salesperson to "write" (create) customer notes as well as read them.

R - Allows salesperson to "read" notes only. Salesperson is not allowed to "write" (create) a new note.

Blank - If left blank, the salesperson is NOT allowed to read or write a customer note.

Salesperson Record A/R Note Level

The level determines "high to low" the level of access to read and/or write new notes. The higher the level, the greater the access to reading and writing notes.

Examples:

High Access: **A/R Note access of W and A/R Note level of 9** would allow high access to reading and writing notes. This salesperson can read ALL levels of notes 0 through 9. This salesperson can write (create) new notes at any level.

Low Access: **A/R Note access of R and A/R Note level of 2** would allow low access to reading and writing notes. This salesperson would be allowed to read notes at level 0, 1 or 2 only. This salesperson would not be allowed to "write" (create) a new note.

How to Enter the Fax Number, Email Address and Tax Exempt # in Notes

The Notes entered here can be read from the "header" screen of a Point of Sale order by salespeople. A note number is assigned to each note as it is entered. The first note you enter for a customer will appear first when customer "notes" are read. For this reason, it is recommended that you enter in important notes first.

The Fax Number can be entered as a separate note from the Email Address or they can be combined on ONE note.

When adding notes, consider how you may want to use the information in the future. If a list of email addresses may be needed in the future, it may be prudent to enter email addresses as a separate note from fax numbers so that they can be easily retrieved later.

Fax Number

If the notes box is blank, continue with entry of the "Level." If the customer has existing "notes," press [F9] to clear the screen.

1. **Level:** Enter the desired Level for the fax number note. Typically a Level of 1 would be used for entry of the fax number because you would want all salespeople to have access to the customer's fax number.

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2. **Msg:** The "Msg" (Message) field is used to code a type of note. Fax numbers could all be grouped under code "F" for Fax. (You are not restricted to using F for Fax. You could use the number 1 or the letter X. The Msg code is defined by you.)

3. Enter the fax number on the first LINE of the notes box. Some users include the word "FAX" in front of the number for clarification purposes. Press [F10] to Save the note.

```
╔══════════════════════════════════════════════════════════════════╗
║ NOTES EDITOR   ANDER      ANDERSON BUILDERS          Level:  1  Msg:  F ║
║                                                                        ║
║ FAX 815-550-7855_____║
║ _____║
║ _____║
║ _____║
║ _____║
║ _____║
║ _____║
║ _____║
║                                                                        ║
║ INS=TOGGLE INSERT   TAB=WORD RIGHT   F3=SLSMAN   F7=INS LINE   F8=DEL LINE ║
╚══════════════════════════════════════════════════════════════════╝
```

Email Address

If the notes box is blank, continue with entry of the "Level." If the customer has existing "notes," press [F9] to clear the screen.

1. **Level:** Enter the desired Level for the email address note. Typically a Level of 1 would be used for entry of the email address because you would want all salespeople to have access to the customer's email address. If this is not the case, enter a higher level. Salespeople with a level equal to or greater than the level you enter will be able to read the note.

2. **Msg:** The "Msg" (Message) field is used to code a type of note. Email Addresses could be grouped under code "E" for Email. (You are not restricted to using E for Email. The Msg code is defined by you.)

3. Enter the email address on the first LINE of the notes box. Press [F10] to Save the note.

4. Repeat steps 1, 2 and 3 above for additional Email Addresses.

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```
╔══════════════════════════════════════════════════════════════════╗
║  NOTES EDITOR   ANDER      ANDERSON BUILDERS          Level:  1  Msg:   E  ║
║                                                                    ║
║  benjohnson@yahoo.com_____ ║
║  _____ ║
║  _____ ║
║  _____ ║
║  _____ ║
║  _____ ║
║  _____ ║
║  _____ ║
║                                                                    ║
║  INS=TOGGLE INSERT  TAB=WORD RIGHT  F3=SLSMAN  F7=INS LINE  F8=DEL LINE ║
╚══════════════════════════════════════════════════════════════════╝
```

```
╔══════════════════════════════════════════════════════════════════╗
║  NOTES EDITOR   ANDER      ANDERSON BUILDERS          Level:  1  Msg:   E  ║
║                                                                    ║
║  marysmith@aol.com_____ ║
║  _____ ║
║  _____ ║
║  _____ ║
║  _____ ║
║  _____ ║
║  _____ ║
║  _____ ║
║                                                                    ║
║  INS=TOGGLE INSERT  TAB=WORD RIGHT  F3=SLSMAN  F7=INS LINE  F8=DEL LINE ║
╚══════════════════════════════════════════════════════════════════╝
```

Tax Exempt ID Number

If the notes box is blank, continue with entry of the "Level." If the customer has existing "notes," press [F9] to clear the screen.

1. **Level:** Enter the desired Level for the Tax Exempt ID number. If you want all salespeople to have access to this number, use Level 1, otherwise specify an appropriate level.

2. **Msg:** The "Msg" (Message) field is used to code a type of note. Tax Exempt Numbers could be grouped under code "T" for Tax.

3. Enter the tax exempt number on the first LINE of the notes box. Press [F10] to Save the note.

Customer Notes for Fax, Email and Tax Exempt ID

Entry of Fax and Email Address in SAME Note

Some users may want to put the Fax Number and Email Address in the SAME note. This is acceptable, however, it is recommended the Fax number and Email address appear on separate lines of the note AND that you use consistency when entering the information. For example, always use the FIRST line of the note for the Fax number and the SECOND line of the note for the email address. This will allow you to later generate reports or capture the information separately.

An example of grouping the fax and email address in the same note is shown below.

In this example, Msg of "F" means "Fax and email address."

```
╔══════════════════════════════════════════════════════════════════════╗
║  NOTES EDITOR   ANDER       ANDERSON BUILDERS           Level:  1  Msg:  F ║
║                                                                        ║
║  FAX 815-550-7855                                                      ║
║  benjohnson@yahoo.com_____ ║
║  _____ ║
║  _____ ║
║  _____ ║
║  _____ ║
║  _____ ║
║                                                                        ║
║  INS=TOGGLE INSERT  TAB=WORD RIGHT  F3=SLSMAN  F7=INS LINE  F8=DEL LINE ║
╚══════════════════════════════════════════════════════════════════════╝
```

Using the example above, a "query" report designed later would be able to "qualify" on capturing only email addresses by using Msg code of "F" and printing only "LINE 2" of the note record.