

## User Notes

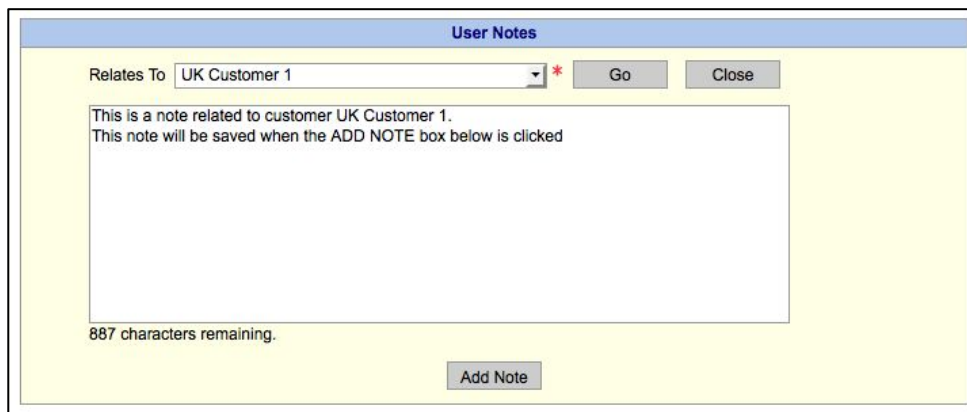
The user note facility allows users to create short notes associated with customer, supplier and employee payee contacts. Notes can be created at various points including when a transaction is being entered or reviewed as well as at anytime from the main menu header.

User notes are stored for future reference; they can also be deleted when no longer required.

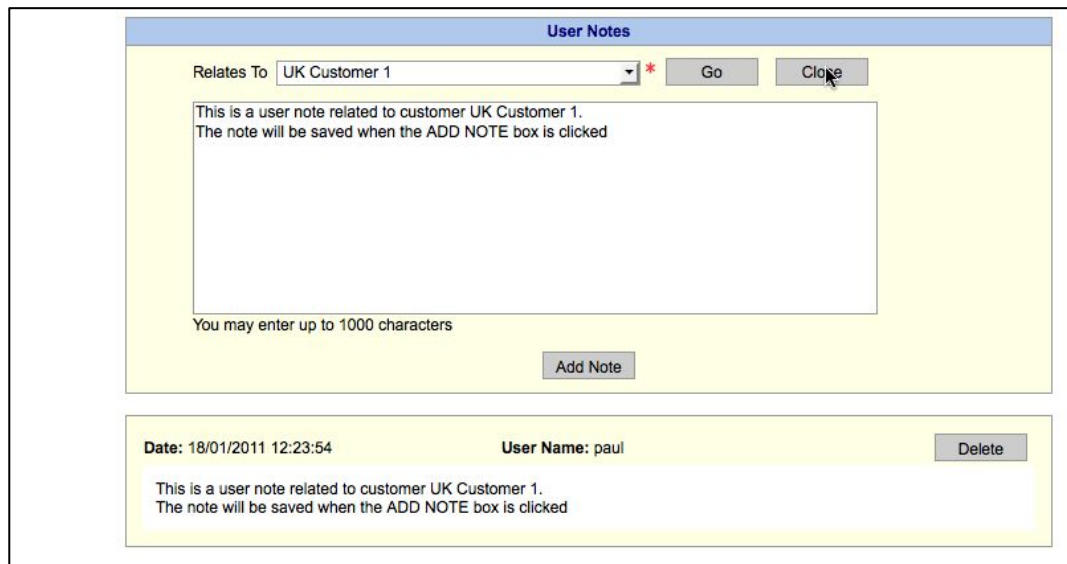
**IMPORTANT: User Notes** will be visible to all users with access to the entity regardless of the role given to a user. As such it may not be appropriate for say employee payroll related **User Notes** to be entered on to the system.


### Creating a User Note

Clicking the  icon, where it is displayed, opens up the **User Note** screen.



Select **Relates To** contact from the dropdown list and then enter the note (you can also use cut and paste into the note) and click **ADD NOTE** to store the note. The screen redraws and the saved note appears below, presented, as another user will see it, with a time and date stamp and the user name of the creator.



The  icon is available from the following screens and menus: -

- ◆ The Main Menu Header
- ◆ Customer list and customer maintenance screens
- ◆ Supplier list and supplier maintenance screens
- ◆ Employee/Officer list and employee/officer maintenance screens
- ◆ Create invoice/credit note and edit invoice/credit note screens
- ◆ Batch invoices screen
- ◆ Enter supplier bill and edit bill screens
- ◆ Batch bills screen
- ◆ Payment transaction screens such as electronic payments, debit and credit cards, cheques and cash expenses
- ◆ Batch expenses screen
- ◆ Staff expenses and mileage claim screens

The **CLOSE** button will exit from the **User Note** screen and return the user to their screen.

### **Filtering User Notes**

Where a **User Note** is opened when the context is known, for instance from the customer maintenance screen, then the **Relates To** field defaults to that context, and any existing notes are displayed.

If another context is required, select it from the **Relates To** field and click the **GO** button; any relevant existing notes are displayed.

### **Deleting a User Note**

A **User Note** is deleted by clicking the **DELETE** button. The action needs to be confirmed. Deletion means that the note is no longer visible to any user.

Please note that the deletion is irreversible.