Customer Notes Revamp

Overview

The **Customer Notes** section on the customer records has been revamped beginning with **Edge version 22.2**.

What's changed:

- Each newly added note appears as in a separate color-coded bubble as opposed to the list format from previous versions.
- Notes can be categorized, prioritized, and color-coded.
- The customer pop-up tab has been removed and all pop-ups have been moved to the notes tab.
- Notes now allow image attachments.

NOTE: Existing notes will be converted as **ONE note** when updated. If desired, you may edit the existing note to manually separate any important notes you wish to follow the newly revamped format.

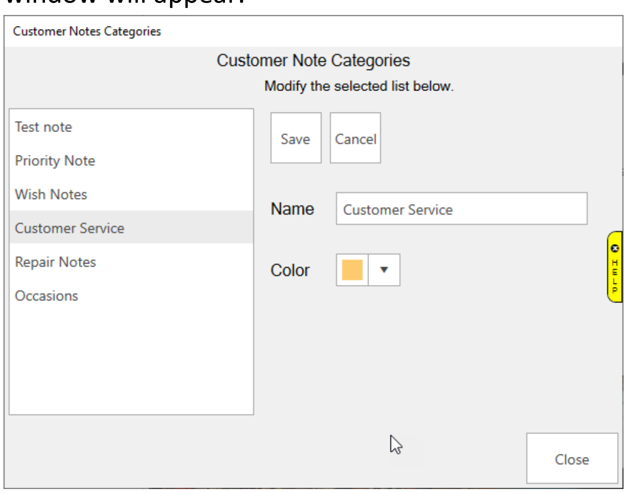
NOTE: We are **NOT** able to convert images embedded in your notes. **These will be removed during the upgrade process**.

Working with Note Categories

Adding a Note Category

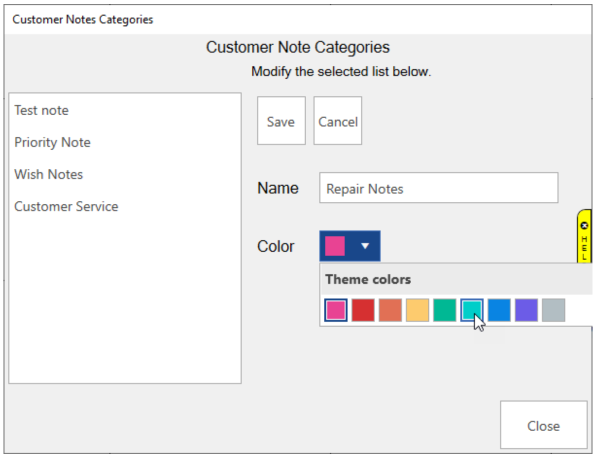
To add a new note category:

1. Navigate to **Administrative > Advanced Settings > Notes Categories**. The **Customer Notes Categories** window will appear.



2. Click **Add** and enter a **Name** for your category in the box.

3. Click the **Color** drop-down arrow and select a **theme color** to determine how your note will appear when added as part of this category.
   New notes added as part of a note category will appear within a bubble filled with the selected color.



4. Click **Save** to create your category.

Editing and/or Deleting a Note Category

To edit or delete an existing note category:

1. Navigate again to **Administrative > Advanced Settings > Notes Categories**. The **Customer Notes Categories** window will appear.
2. Highlight the note you wish to change and click either the **Edit** or **Delete** button.
   a. **Edit**: Make any desired changes and click **Save**. Alternatively, you may click **Cancel** and select a different note.
   b. **Delete**: A pop-up will ask you to **confirm** that you are sure you wish to delete your category. Select **Yes** or **No**.

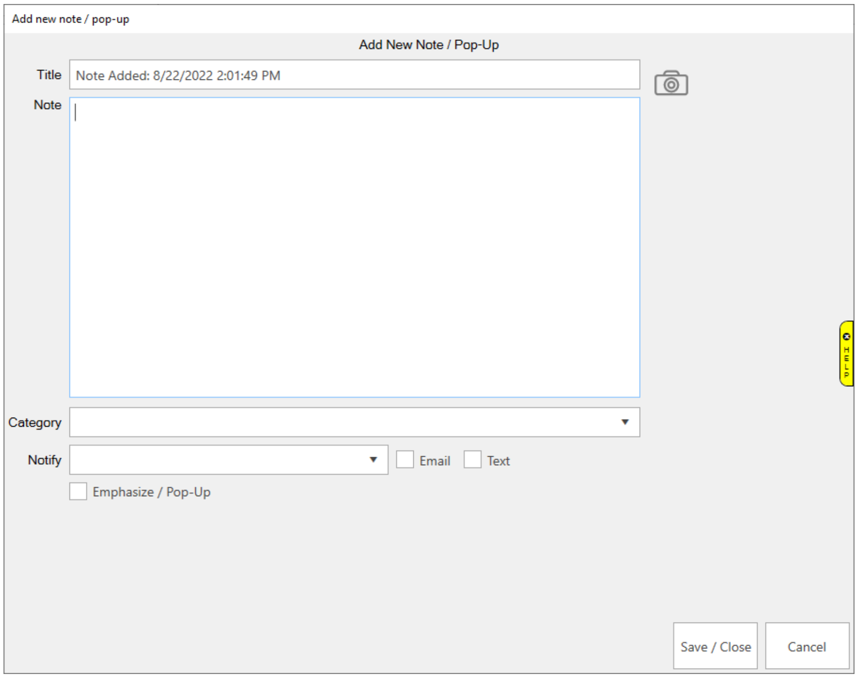
Adding a New Note

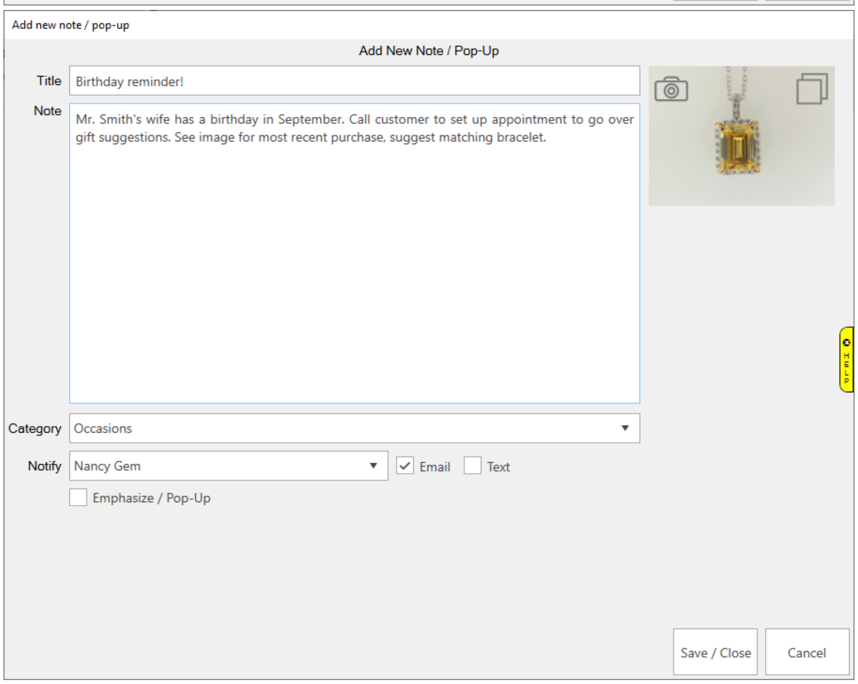
Now that you have created your **Note Categories**, it's time to **add** a customer note. You will find that adding customer notes has remained mostly the same as with previous versions, just with added functionality.

To add a note to a customer record:

1. Navigate to **Customer > Find**. Enter desired criteria to locate your customer and click **OK**.
2. Click the **Notes** tab.

3. At the bottom, click the **Add** button. The **Add New Note/Pop-Up** window will appear.



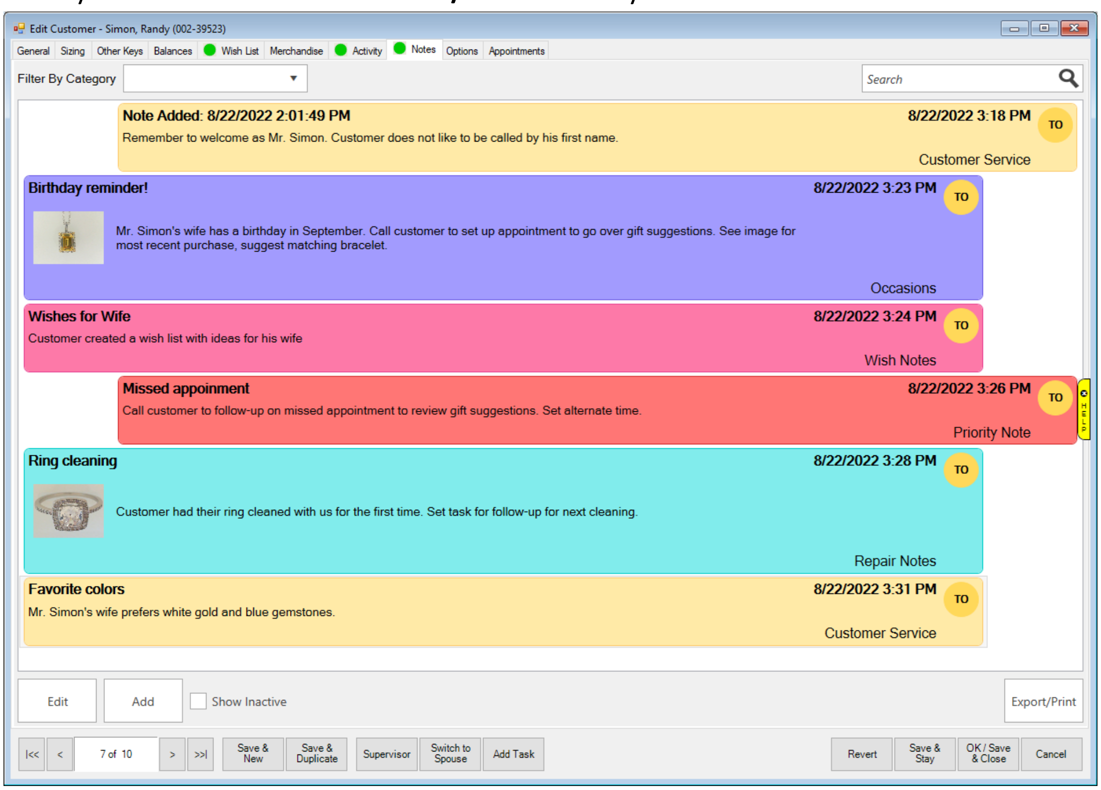


Fields and options on the **Add New Note/Pop-Up** window include:

Title	Title for note. Note titles default to the date/time note is added.
Note	The location to write the note itself.
Category	List of available categories to categorize your note that you created under Customer Note Categories.

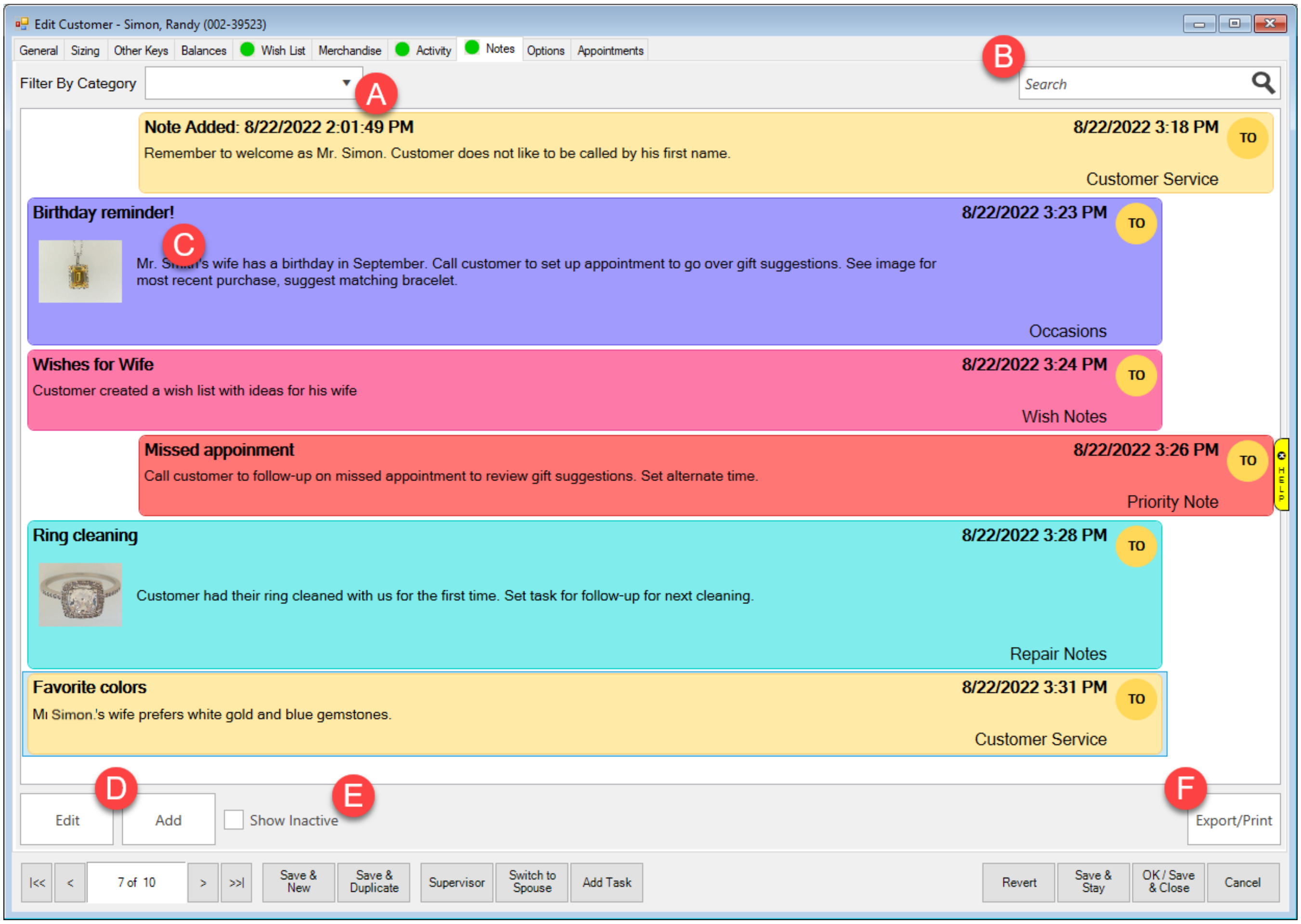
Notify	Select an associate to receive a notification for this note.
Email/Text	Checkboxes to determine the method for associate notification.
Emphasize/Pop-Up	Prioritize an important note so it pops up at POS. Emphasized notes will display to the right of other note bubbles. Regular notes display to the left. You will see additional options when checked: • Pop-up Dates: Choose a start/end time for your note to be emphasized. • Account: Note appears for the whole account, including spouse. • Individual: Note appears only for the primary customer.
	Attach an image to notes.

4. Enter your note details and click **Save/Close** to save your note.



Working with Customer Notes

The **Customer Notes** tab comes with a variety of options to best sort and manage your customer notes.



A	Choose which category of notes you see at one time. Leave blank to see all notes.
B	Search for keywords to easily locate important notes.
C	List of all saved notes saved separately within individual note bubbles.
D	Highlight an existing note and Edit or click Add to create a new note.
E	Include deleted notes in note results.

F Export/Print full customer notes. Select your options and click Print/Export.