

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.

Customer Notes Categories

Customer Note Categories

Modify the selected list below.

Test note

Priority Note

Wish Notes


Customer Service

Repair Notes

Occasions

Save Cancel

Name Customer Service

Color  ▼

ADD

Close

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.

Add new note / pop-up

Add New Note / Pop-Up

Title Note Added: 8/22/2022 2:01:49 PM 

Note

Category



Notify Email Text


Emphasize / Pop-Up

Save / Close Cancel

Add new note / pop-up

Add New Note / Pop-Up

Title Birthday reminder!  

Note Mr. Smith's wife has a birthday in September. Call customer to set up appointment to go over gift suggestions. See image for most recent purchase, suggest matching bracelet. 

Category Occasions

Notify Nancy Gem Email Text

Emphasize / Pop-Up

Save / Close Cancel

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.

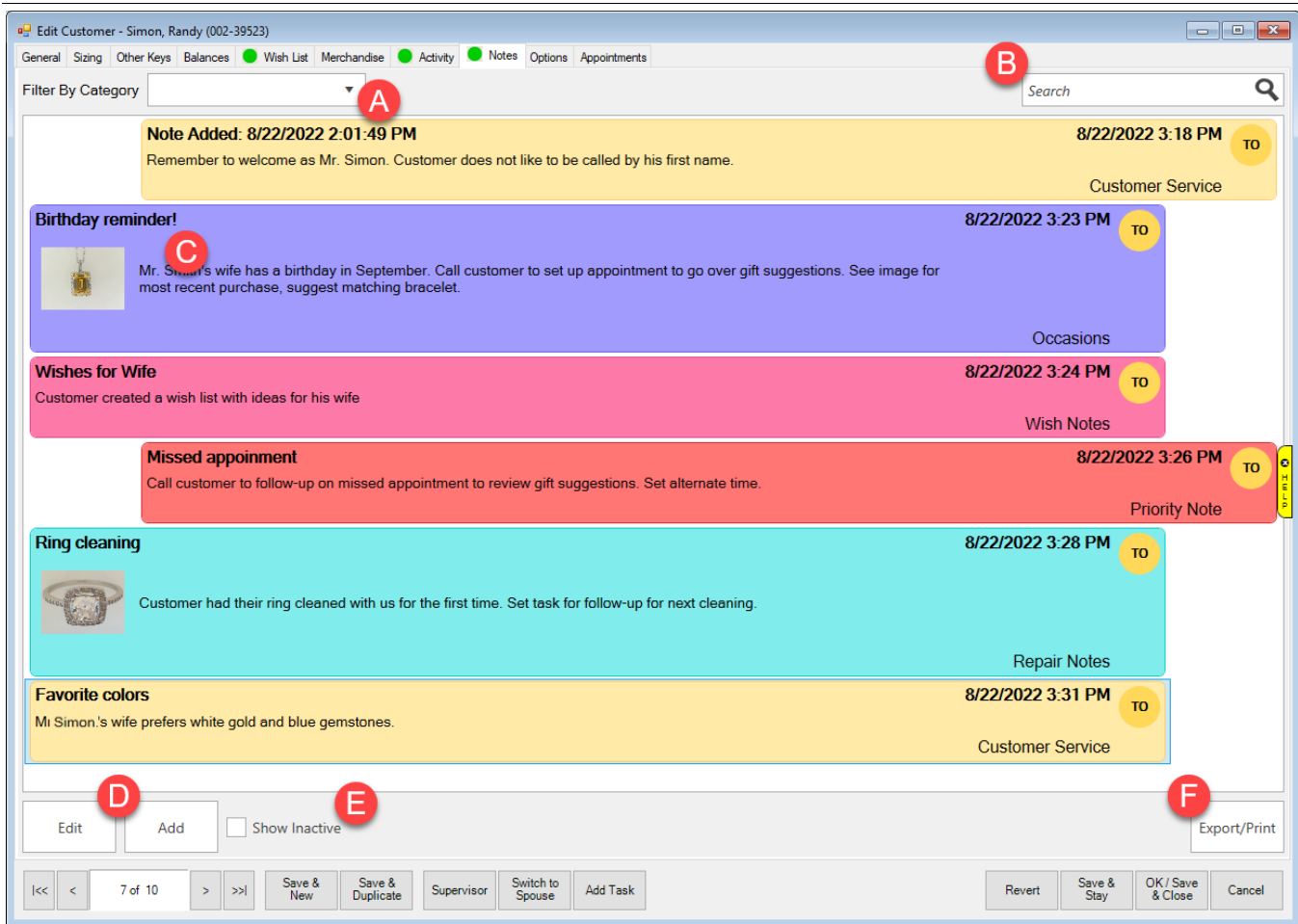
The screenshot shows the 'Edit Customer' window for 'Simon, Randy (002-39523)'. The 'Notes' tab is active, displaying a list of notes. Each note is a colored bubble with a title, description, date, time, and category. The notes are:

- Note Added:** 8/22/2022 2:01:49 PM. Remember to welcome as Mr. Simon. Customer does not like to be called by his first name. Category: Customer Service. Time: 8/22/2022 3:18 PM.
- Birthday reminder!** Mr. Simon's wife has a birthday in September. Call customer to set up appointment to go over gift suggestions. See image for most recent purchase, suggest matching bracelet. Category: Occasions. Time: 8/22/2022 3:23 PM.
- Wishes for Wife:** Customer created a wish list with ideas for his wife. Category: Wish Notes. Time: 8/22/2022 3:24 PM.
- Missed appointment:** Call customer to follow-up on missed appointment to review gift suggestions. Set alternate time. Category: Priority Note. Time: 8/22/2022 3:26 PM.
- Ring cleaning:** Customer had their ring cleaned with us for the first time. Set task for follow-up for next cleaning. Category: Repair Notes. Time: 8/22/2022 3:28 PM.
- Favorite colors:** Mr. Simon's wife prefers white gold and blue gemstones. Category: Customer Service. Time: 8/22/2022 3:31 PM.

 The interface includes a search bar, a 'Filter By Category' dropdown, and a toolbar at the bottom with buttons for 'Edit', 'Add', 'Show Inactive', 'Export/Print', 'Revert', 'Save & Stay', 'OK / Save & Close', and 'Cancel'. There are also navigation buttons for 'Save & New', 'Save & Duplicate', 'Supervisor', 'Switch to Spouse', and 'Add Task'.

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.

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

