CRM

Adding Notes and Tasks

Notes may be added to Tasks, Customers, Sales Orders, Purchase Orders and Stock Transfers; the process is the same for each one.

> Task categories are controlled within Site Settings

> On Sales Orders, it is possible to email the note directly to the Customer; this email will include any attachments you upload to the Note

How to add a Note or a Task

1. Click into this box to type a note

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2. Click add attachments to the note

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Tip: There is a file size limit, but it is possible to add multiple files simultaneously; use this to add PDFs, images and short videos

3. Choose your files from the dialogue, or alternatively drag and drop them onto the 'choose files' button

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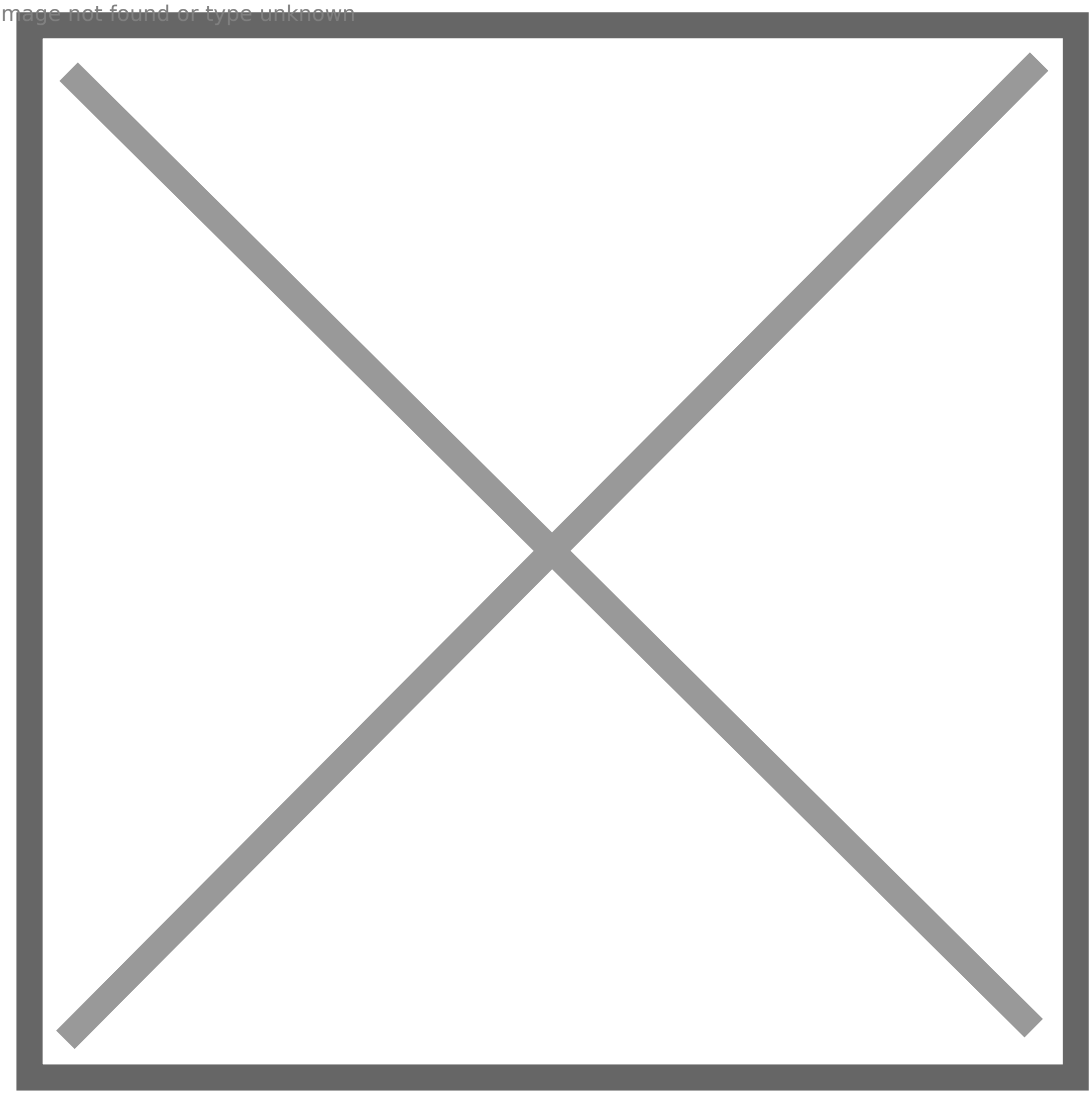

Tip: You have the option to save this as a note or to turn it into a Task

4. To turn this into a task, click the appropriate button

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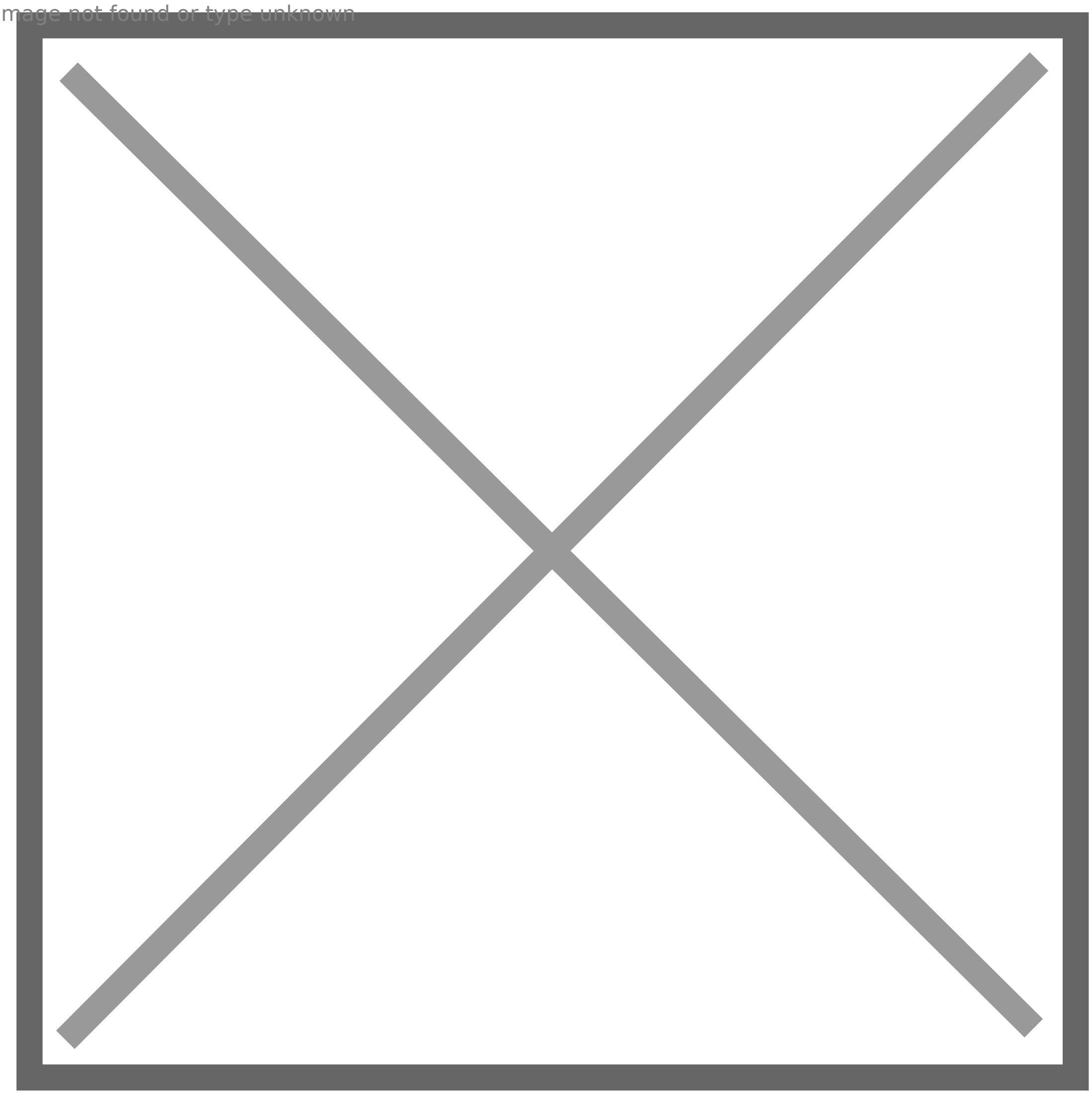

5. Make you selections, and then click to 'create task'; this will save the note and add a Task

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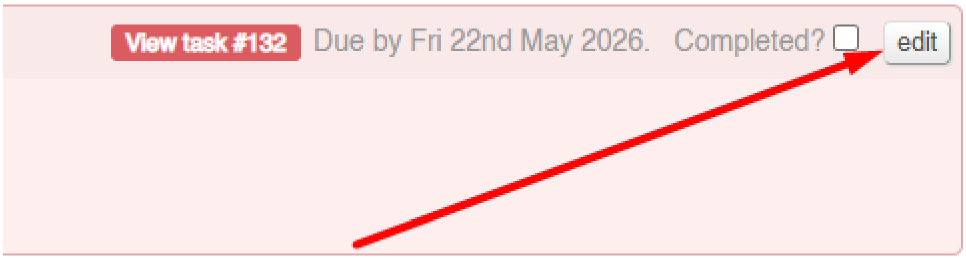
Edit a Task

Use this control to edit a Task.



This control may be used in order to change:

- the User responsible for the Task
- the date the Task is due
- the category of the Task

Simply use the dialogue to make the amends and click save.