CRM

- Adding Notes and Tasks
- Edit a Task

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.

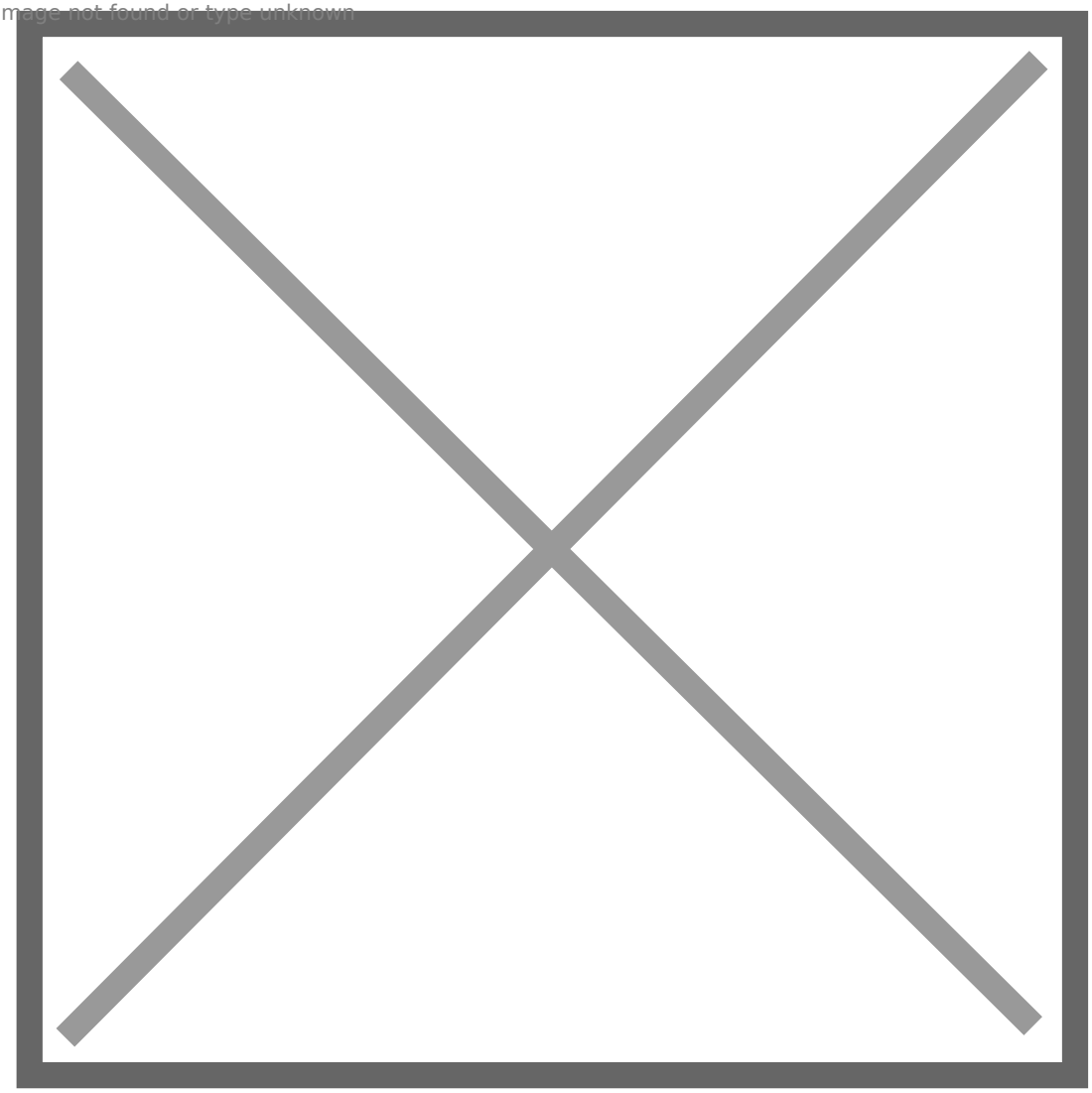
> Task categories are controlled within Site Settings

> 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

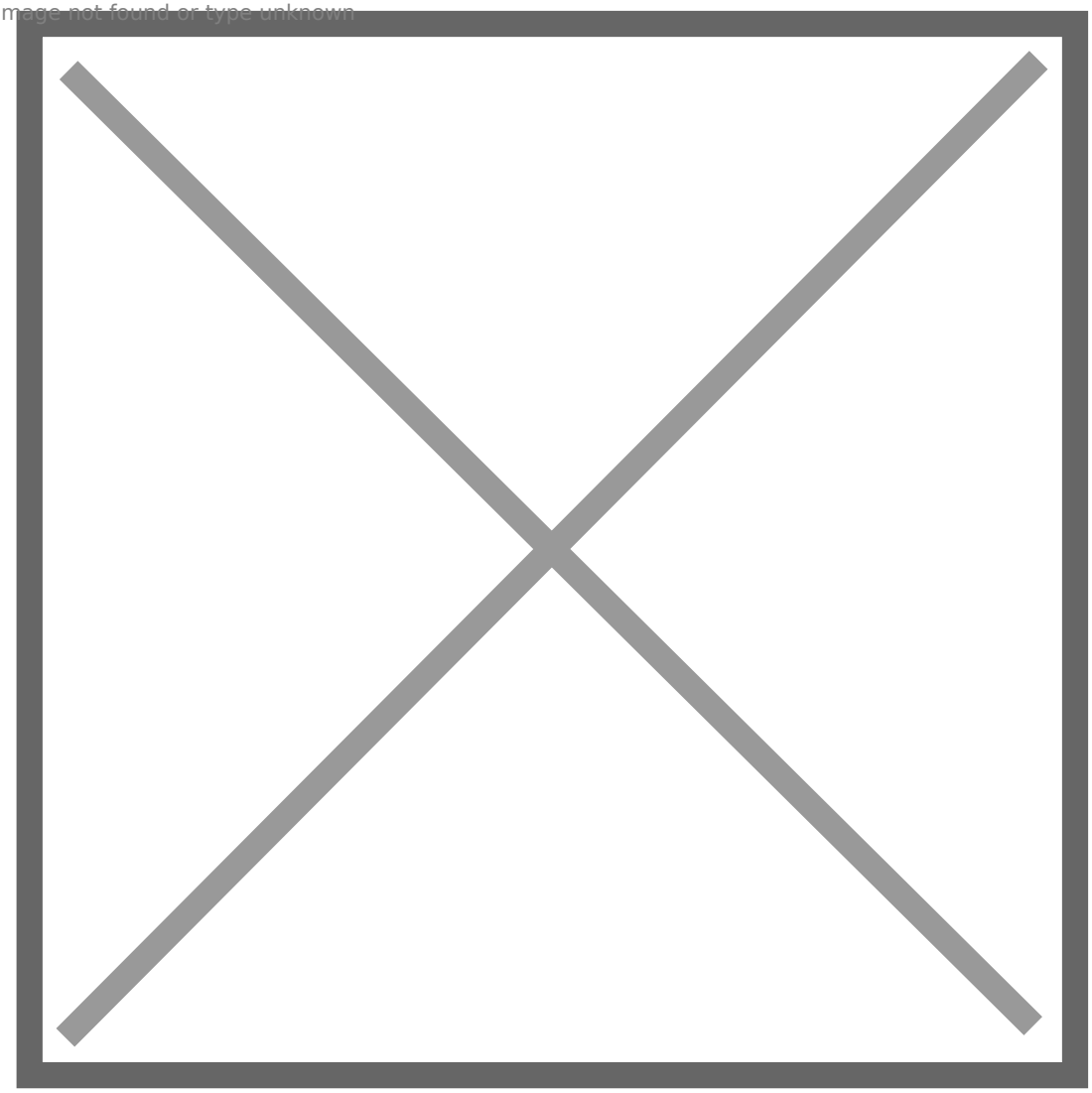
1. Click into this box to type a note

Image not found or type unknown



2. Click add attachments to the note

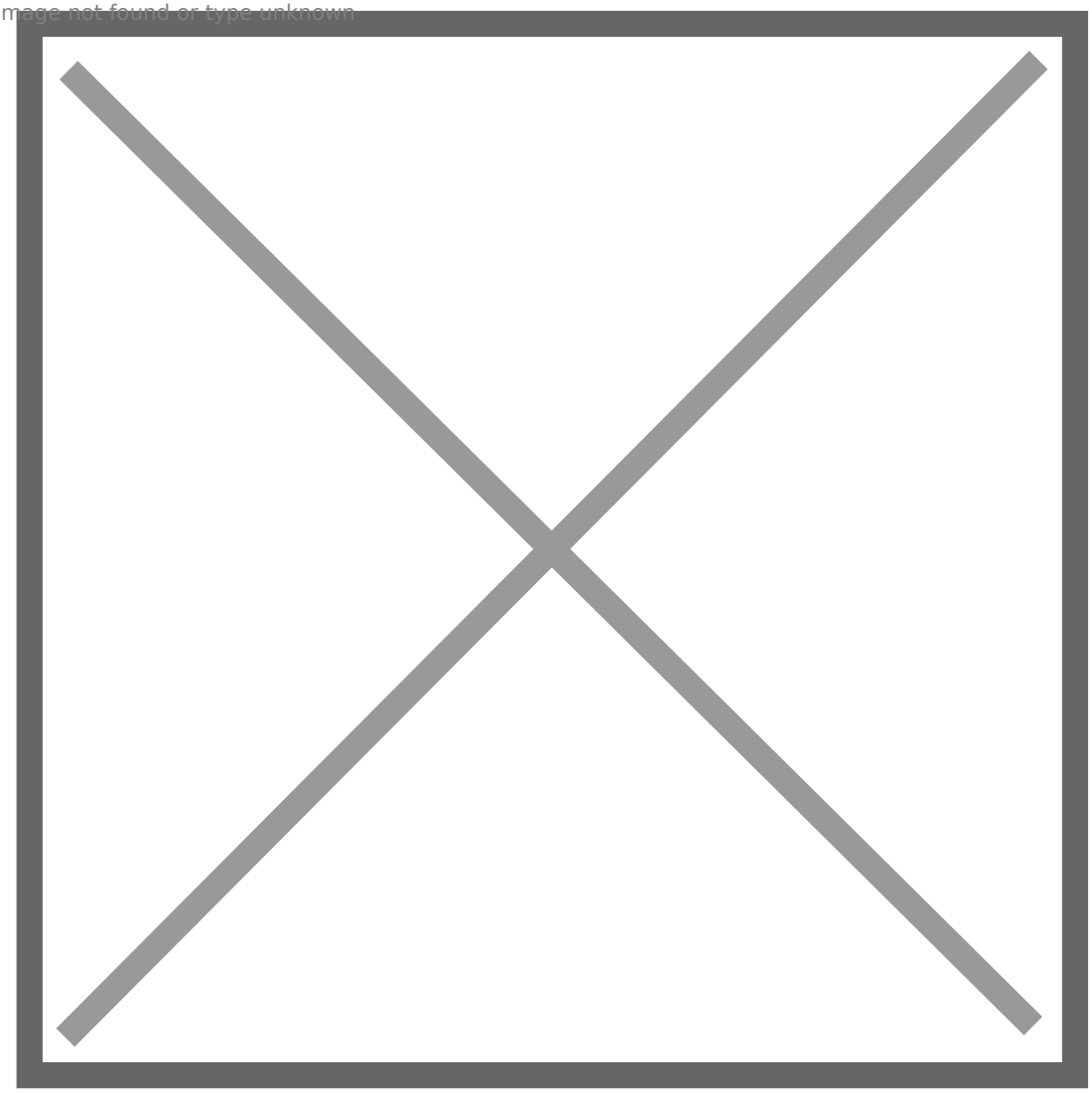
Image not found or type unknown



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

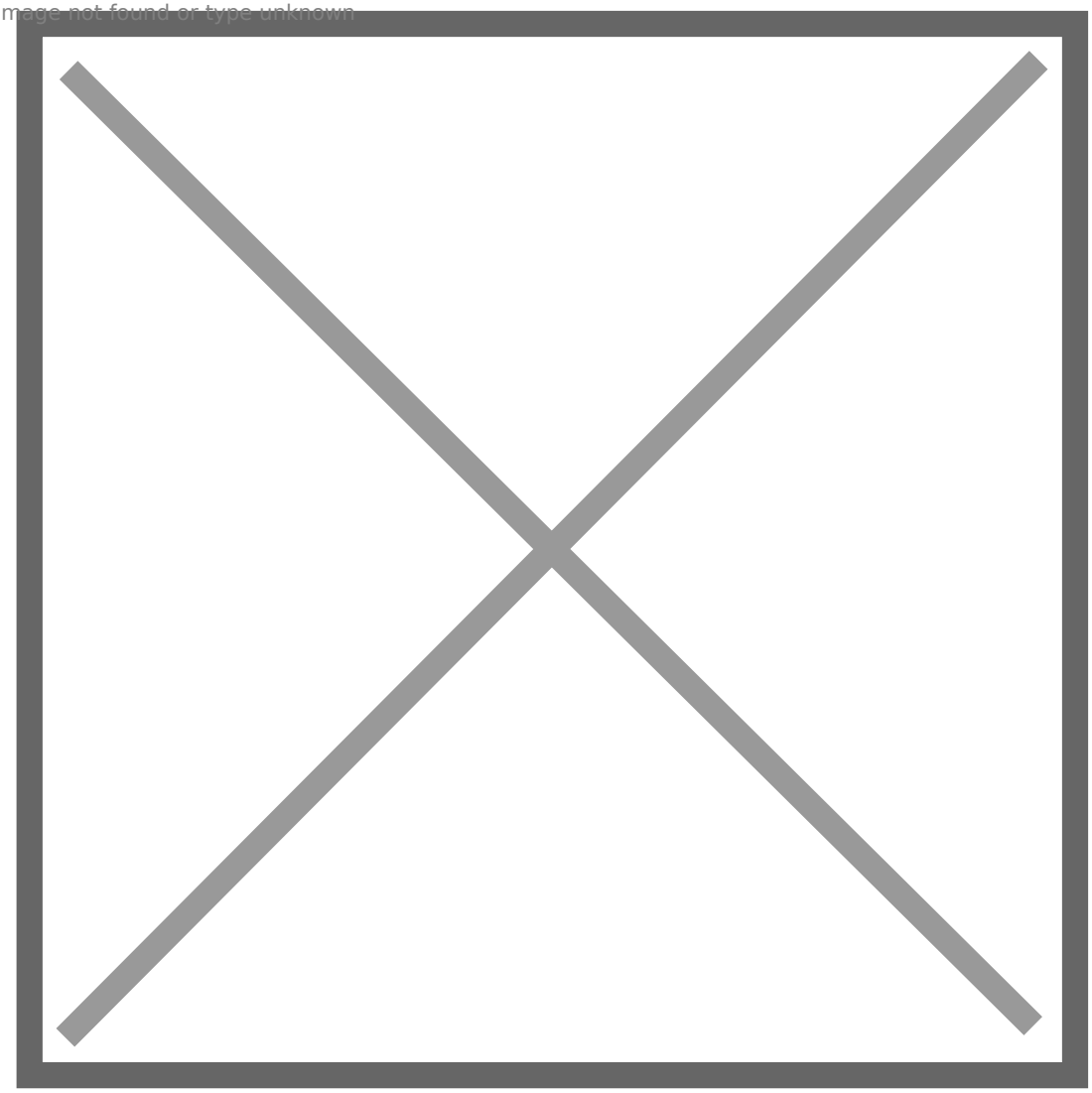
Image not found or type unknown



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

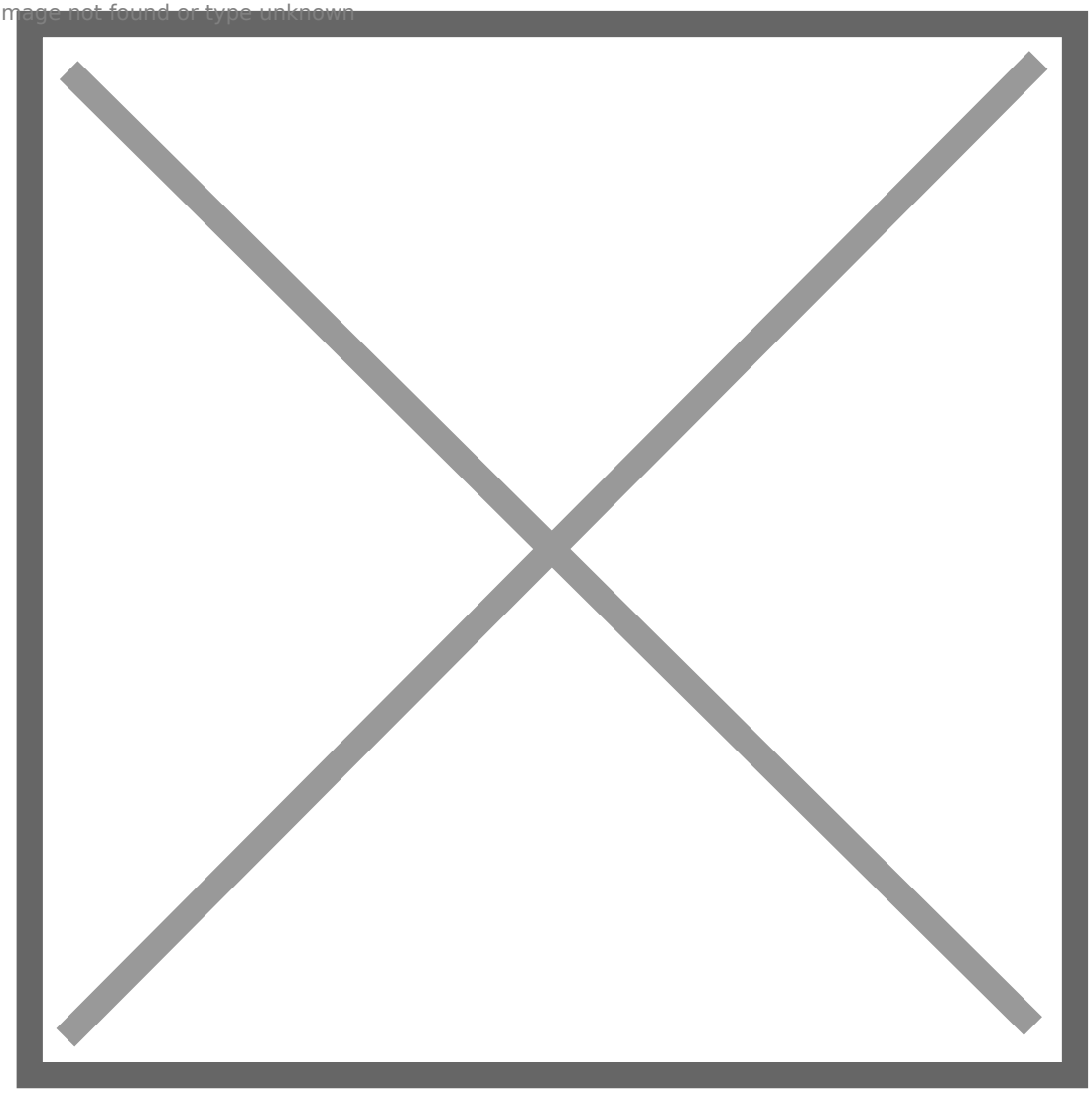
4. To turn this into a task, click the appropriate button

Image not found or type unknown



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

Image not found or type unknown



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.

