

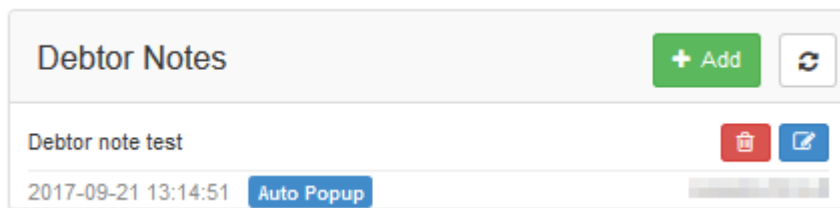
Debtors notes can be added to show on the Edit Customer (Customer Profile) screen. A new feature has been added to manage these debtor note templates as categories in the Categories screen.

Debtor notes can also be set to pop up automatically on the Edit Customer screen when there is one or more auto popup notes on the selected customer. The note will then pop up each time the Edit Customer screen is opened.

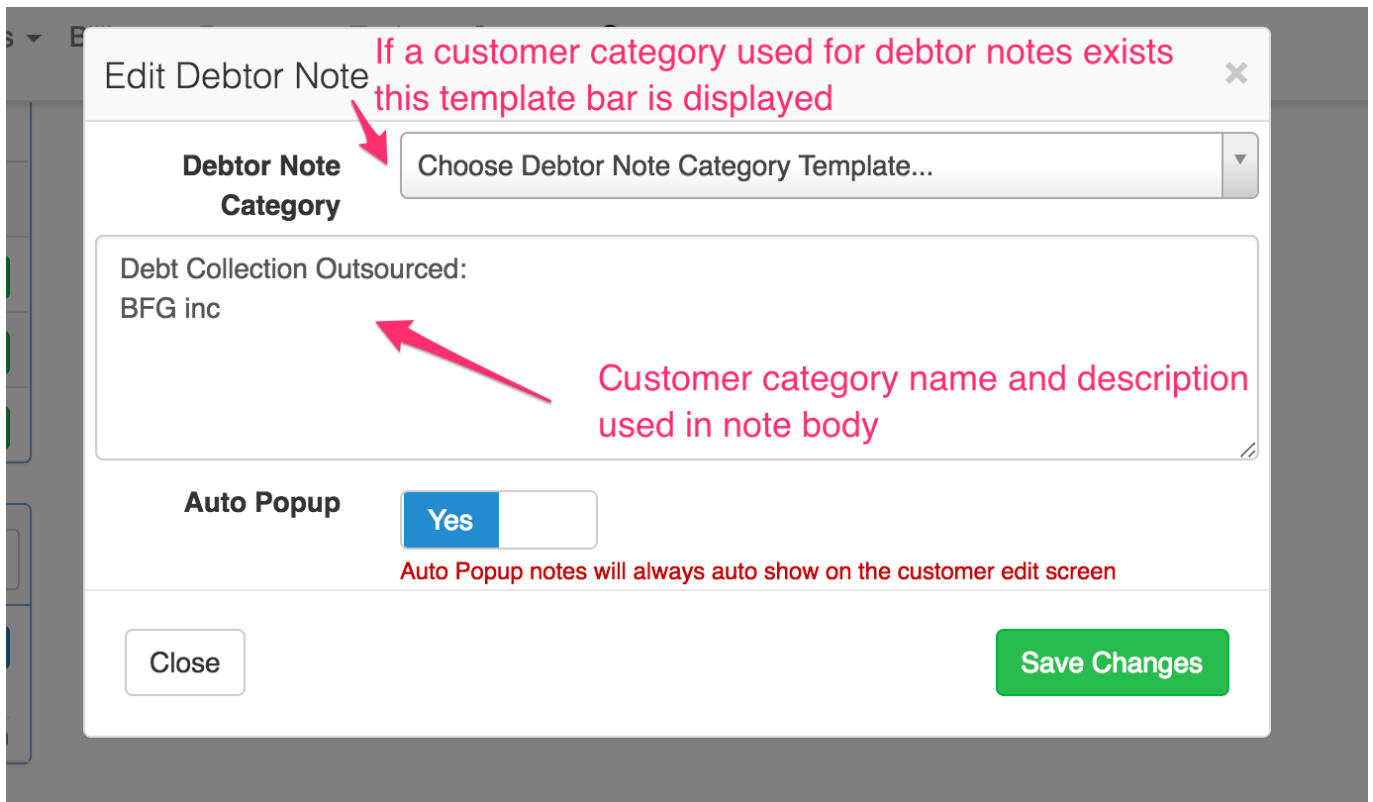
How to add a debtor note on the Edit Customer screen:

Go to Customers -> List Customers -> Edit Customers

Debtor notes can be seen, added and edited on the Edit Customer screen in the Debtor Notes block in the first column.

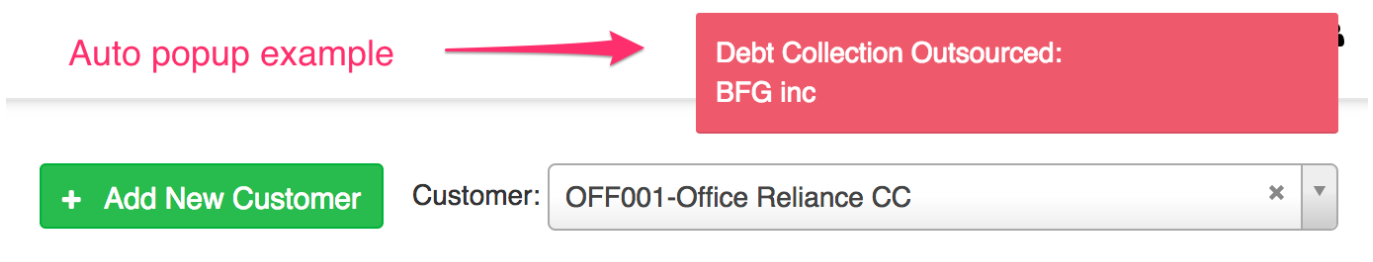


If a customer category used for debtor notes exists, a template bar will display where you can choose a debtor note template on creation or editing of a debtor note.



The screenshot shows the 'Edit Debtor Note' dialog box. A red arrow points from the text 'If a customer category used for debtor notes exists this template bar is displayed' to the 'Choose Debtor Note Category Template...' dropdown menu. Another red arrow points from the text 'Customer category name and description used in note body' to the text area containing 'Debt Collection Outsourced: BFG inc'. A third red arrow points from the text 'Auto Popup notes will always auto show on the customer edit screen' to the 'Auto Popup' section, which has a 'Yes' button selected. The dialog box has 'Close' and 'Save Changes' buttons at the bottom.

Debtors note auto popup example:



The screenshot shows the customer edit screen. A red arrow points from the text 'Auto popup example' to a red box containing the text 'Debt Collection Outsourced: BFG inc'. Below this, there is a green button labeled '+ Add New Customer' and a 'Customer:' dropdown menu with the value 'OFF001-Office Reliance CC'.

How to add a debtor note template as a customer category:

Go To Customers -> Categories and add or edit a category to be used only for debtors notes.

Edit Category #13

Category Name

Debt Collection Outsourced

Category Description

BFG inc

Note name and title based on these fields

Use for Customers

No

Use for Radius Users

No

Use for Billing

No

Use for Helpdesk Tickets

No

Use for Debtor Notes

Yes

Auto Rollover Unused Monthly Data

No

Auto Rollover Unused Topups

No

Add Reseller Logo on Invoices

No

Warning: A category assigned to debtor notes cannot be used for any other use.

Close

new warning when using debtor note for category - other sliders are automatically disabled too.

Update

How to add a debtor note to customers in bulk:

Go to Customers -> Categories

Categories

Normal + Add Category Refresh

Show 25 Rows Search:

| Category Name | Category Description | Use for Customers | Use for Radius Users | Use for Billing | Use for Helpdesk | Use for Debtor Notes | Num Customers | Additional Inv Logo | Auto Data Rollover | |
|----------------------------|--|-------------------|----------------------|-----------------|------------------|----------------------|---------------|---------------------|-----------------------|--|
| Reseller | Resellers | | | Yes | Yes | | | Yes | | |
| DEbt inhouse | Tannies to phone | | | | | Yes | | | | |
| DEbt Collection Outsourced | BFG inc | | | | | Yes | | | | |
| Ad-hoc | Ad-Hoc customers that use the internet only occasionally | Yes | | | | | 18 | Yes | | |
| Do not edit | Do not edit | Yes | | | | | 1 | | | |
| Estate | Customers that live in a fiber estate | Yes | Yes | | Yes | | 2 | Yes | | |
| bill | | Yes | | Yes | | | 2 | Yes | | |
| Statement sync pending | Do not change the category name NB! NB! | Yes | | | | | | | | |
| Friend | Family & friends | Yes | | | | | | Yes | | |
| Topup Rollover | Topup Rollover | Yes | | | | | 1 | Yes | Monthly Data & Topups | |

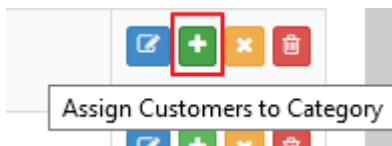
Showing 1 to 10 of 10 entries

New column

Previous 1 Next

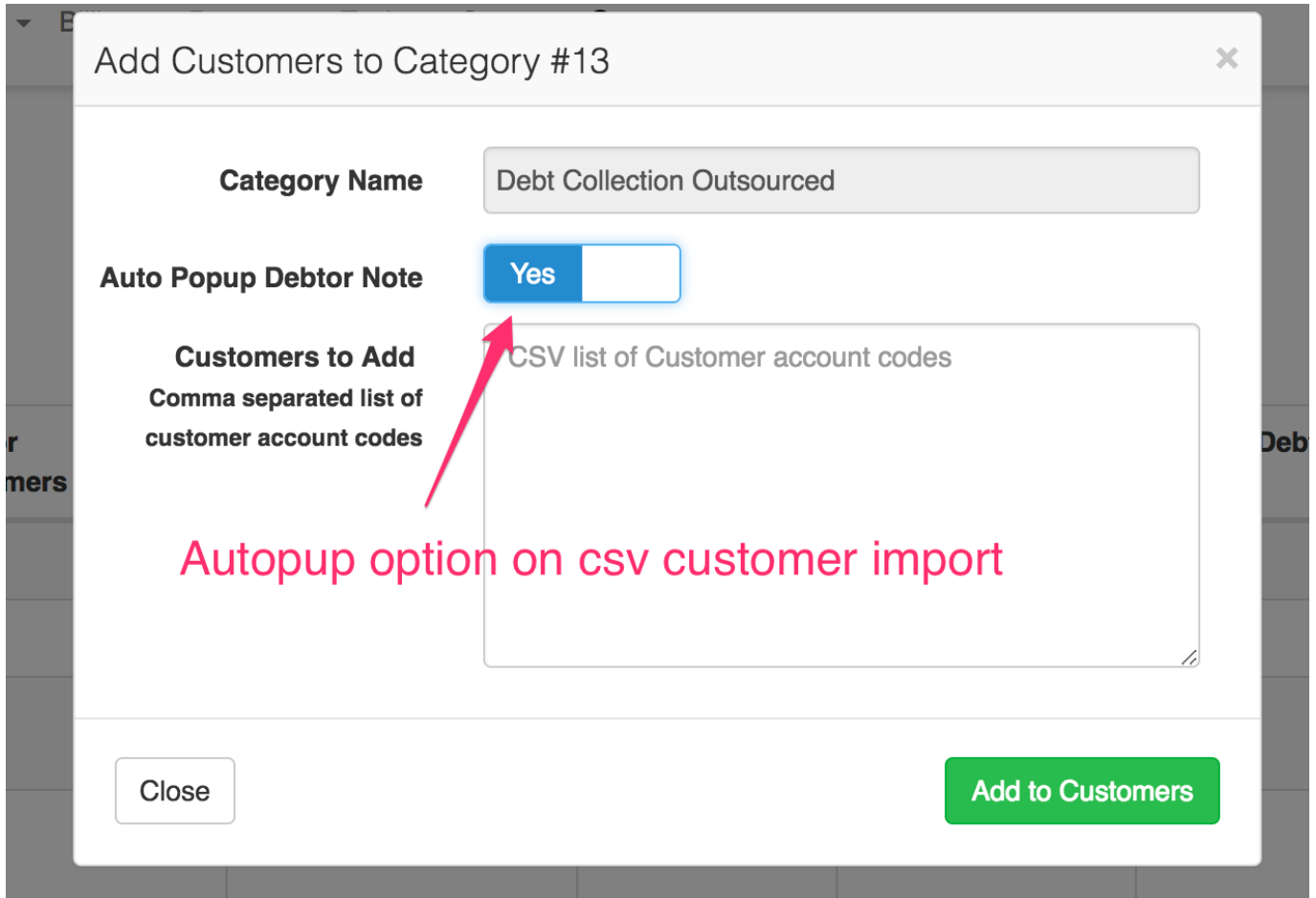
At the right side of the screen you can see a green plus button for the category. This button will allow you to assign customers to a category.

This is useful for bulk assigning.



Click on "Assign Customers to Category" and you will see the "Add Customers to Category" screen.

You can add debtors notes to customers by adding a list of comma separated customer account codes on the category in the "Customers to Add" field.



Add Customers to Category #13

Category Name Debt Collection Outsourced

Auto Popup Debtor Note Yes

Customers to Add
Comma separated list of customer account codes
CSV list of Customer account codes

Autopup option on csv customer import

Close Add to Customers