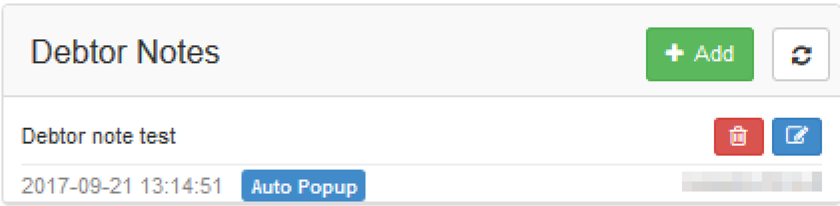
Debtors notes can be added to show on the Edit Customer (Customer Profile) screen. A new feature has been added to manage these debtor note templates as categories in the Categories screen.

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.

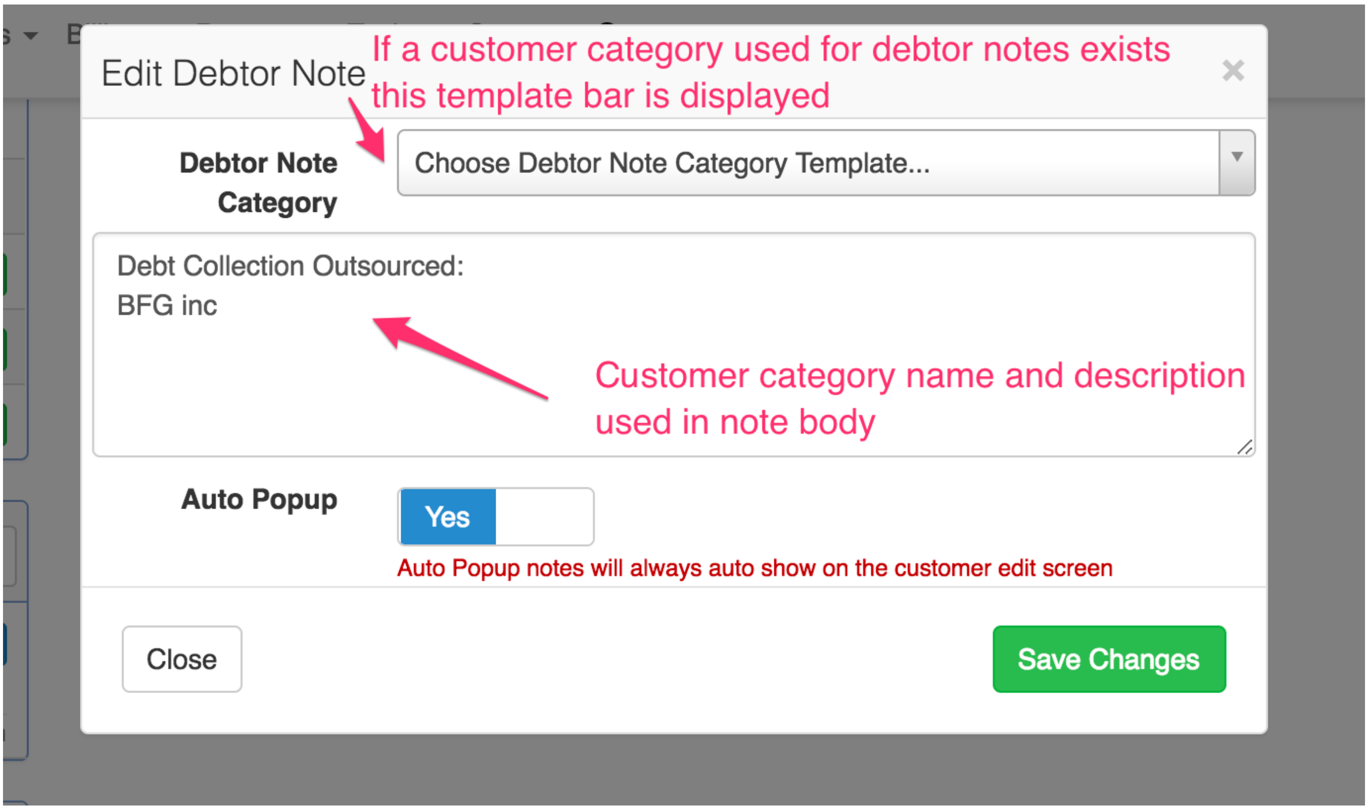
How to add a debtor note on the Edit Customer screen:

Go to Customers –> List Customers –> Edit Customers

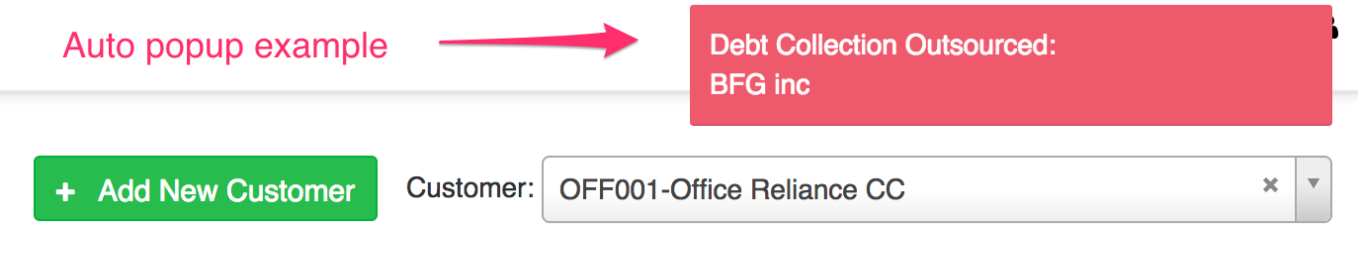
Debtor notes can be seen, added and edited on the Edit Customer screen in the Debtor Notes block in the first column.



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.

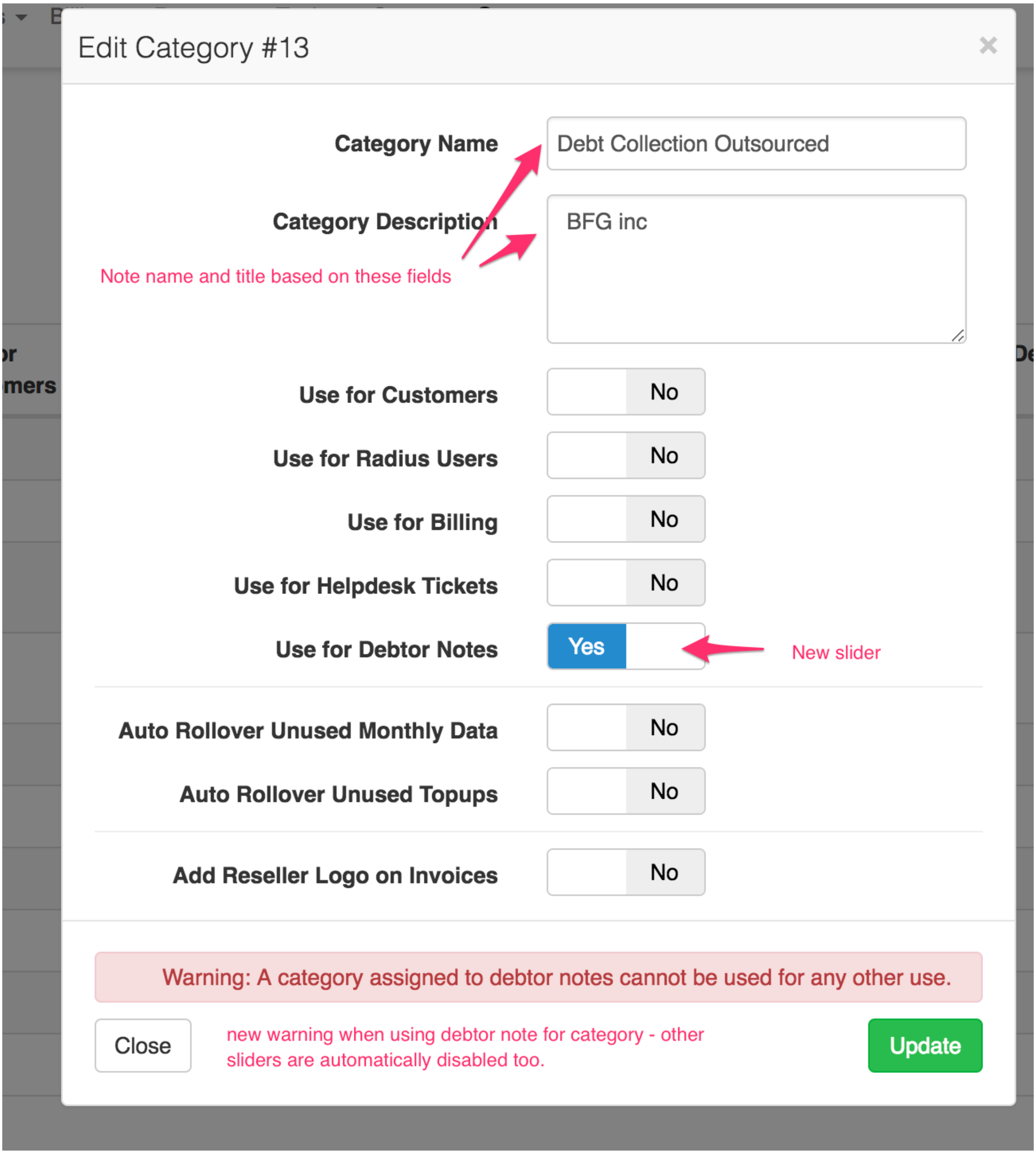


Debtors note auto popup example:



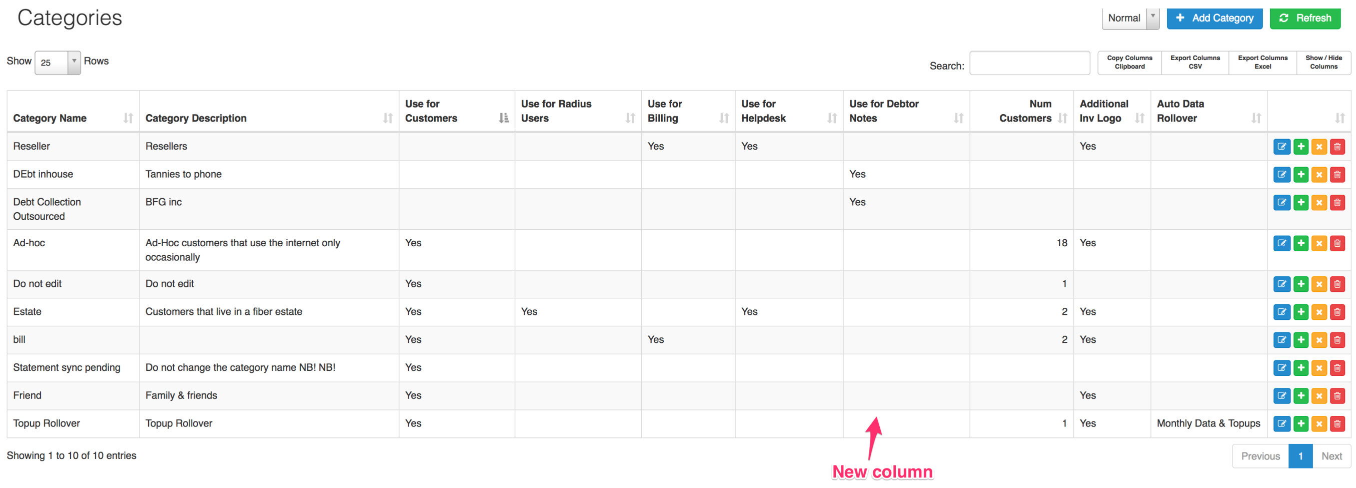
How to add a debtor note template as a customer category:

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
New slider
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



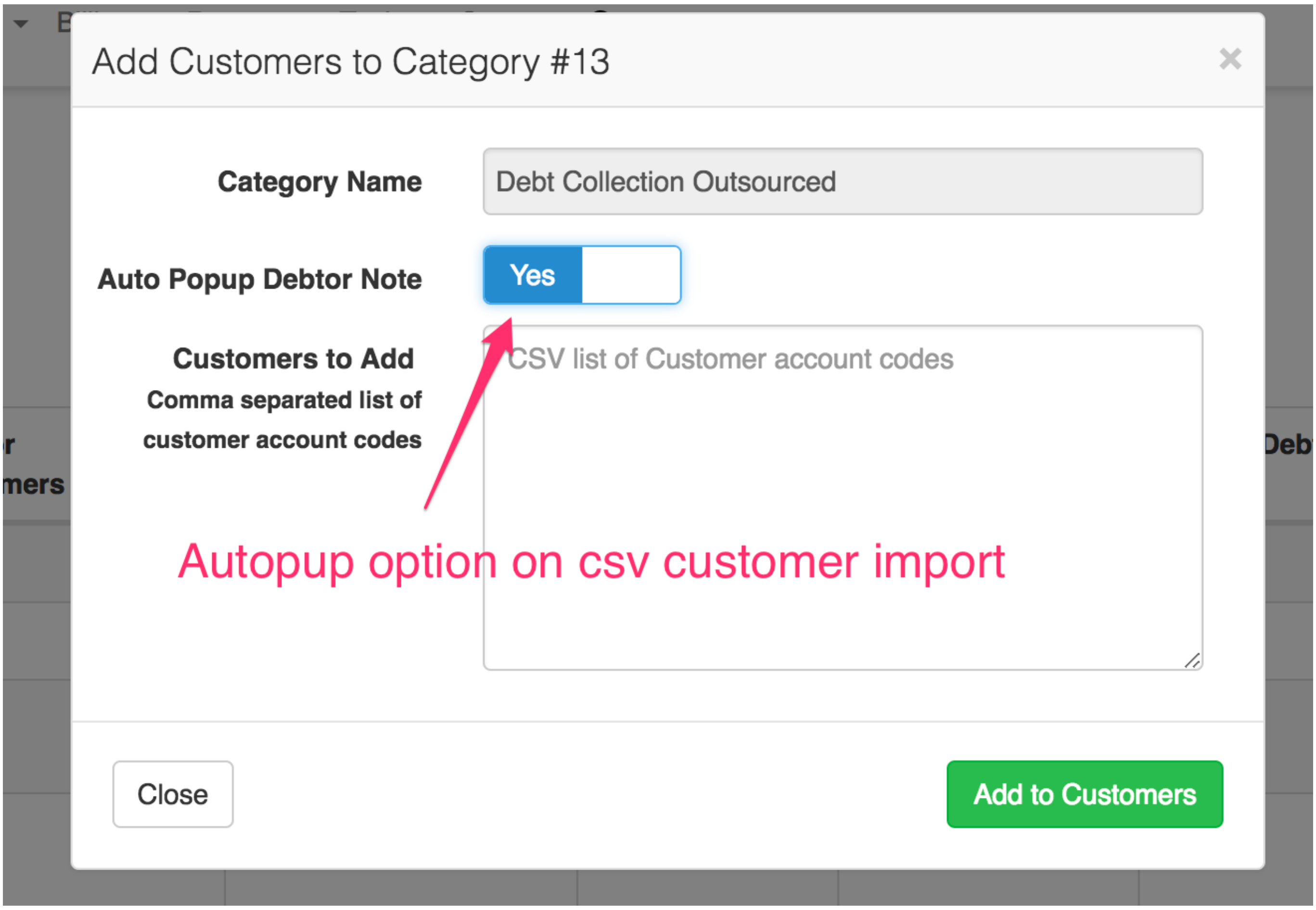
Category Name	Category Description	Use for Customers	Use for Radius Users	Use for Billing	Use for Helpdesk	Use for Debtor Notes	Num Customers	Additional Inv Logo	Auto Data Rollover
Reseller	Resellers			Yes	Yes			Yes	
DEbt inhouse	Tannies to phone					Yes			
Debt Collection Outsourced	BFG inc					Yes			
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

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