Credit Control Diary

Last updated: August 25, 2022

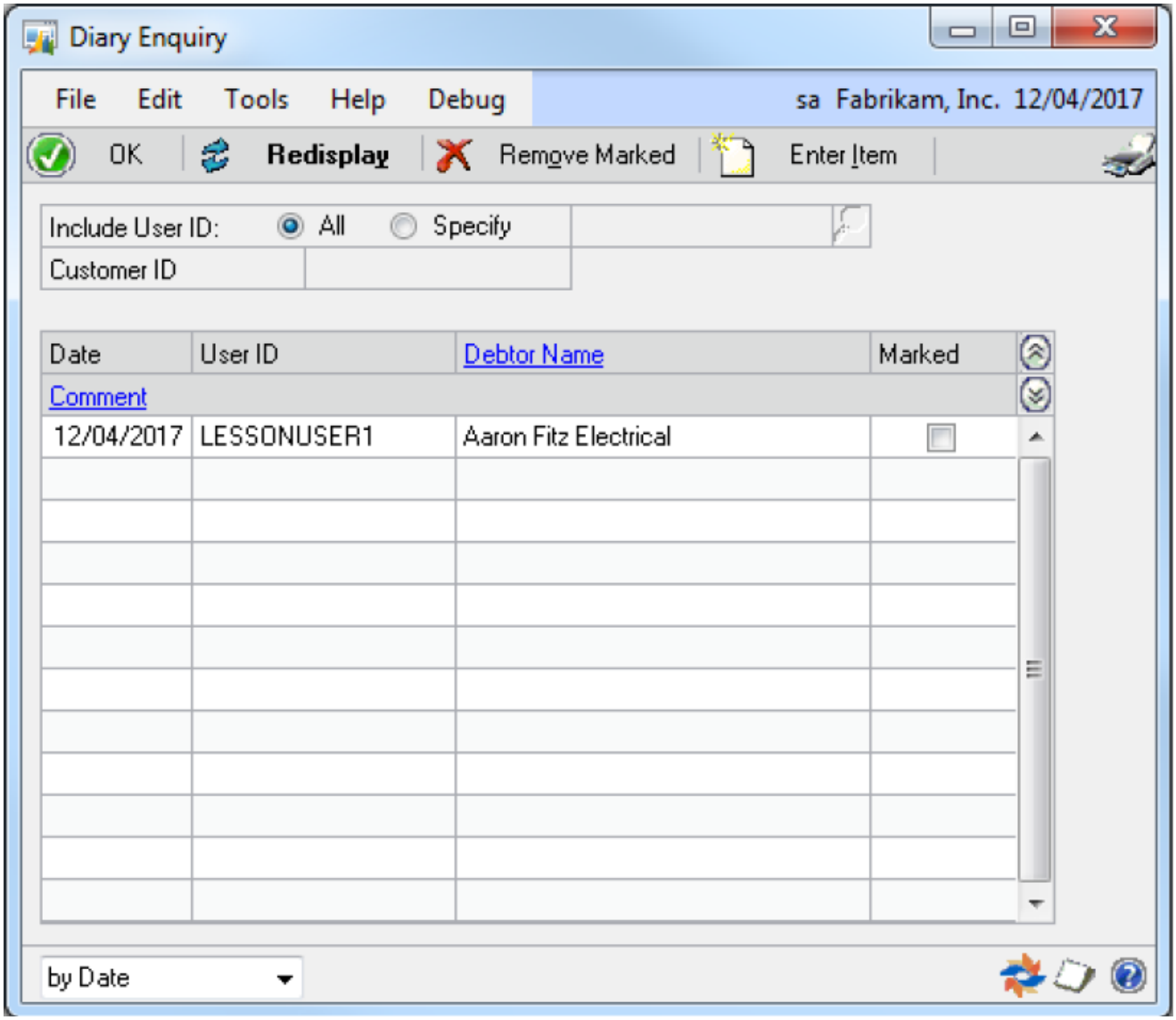
Location

Enquiry >> Sales >> Credit Control >> Diary Enquiry

Summary

The diary allows recording of events against each customer for the future. The diary enquiry window allows each user to view their own assigned events.

Layout



Processing

Each diary item is shown in the scrolling window, which can be sorted by date, customer and user ID. The items can be restricted to a specific user ID. To update the details of an item, zoom on the comment field to open the entry screen. New items are created using the ‘Enter Item’ button.

Once an item is finished with, it can be removed to customer records by marking it and using the Removed Marked button.

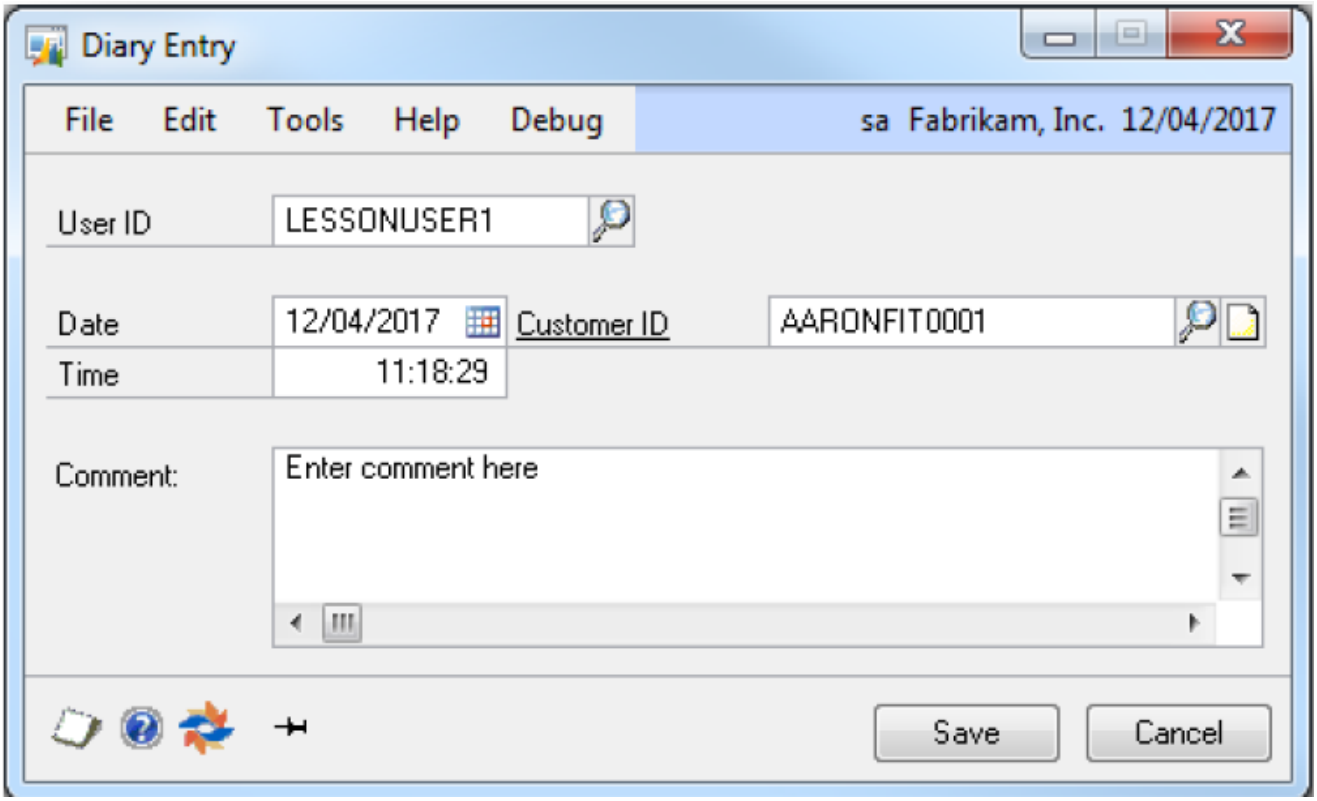
The Print item in the File menu can be used to print a Diary report based on the current Customer and/or User ID.

Diary Entry

Location

‘Enter Item’ button on Diary Enquiry window.

Layout



Processing

All the fields should be filled in on the Diary Entry window. The stick pin keeps the window open after entering an item, thus allowing for several items to be entered at once. The Diary Enquiry window, if it is open, is automatically updated when a new item is entered.

Customer Records and Diary Print

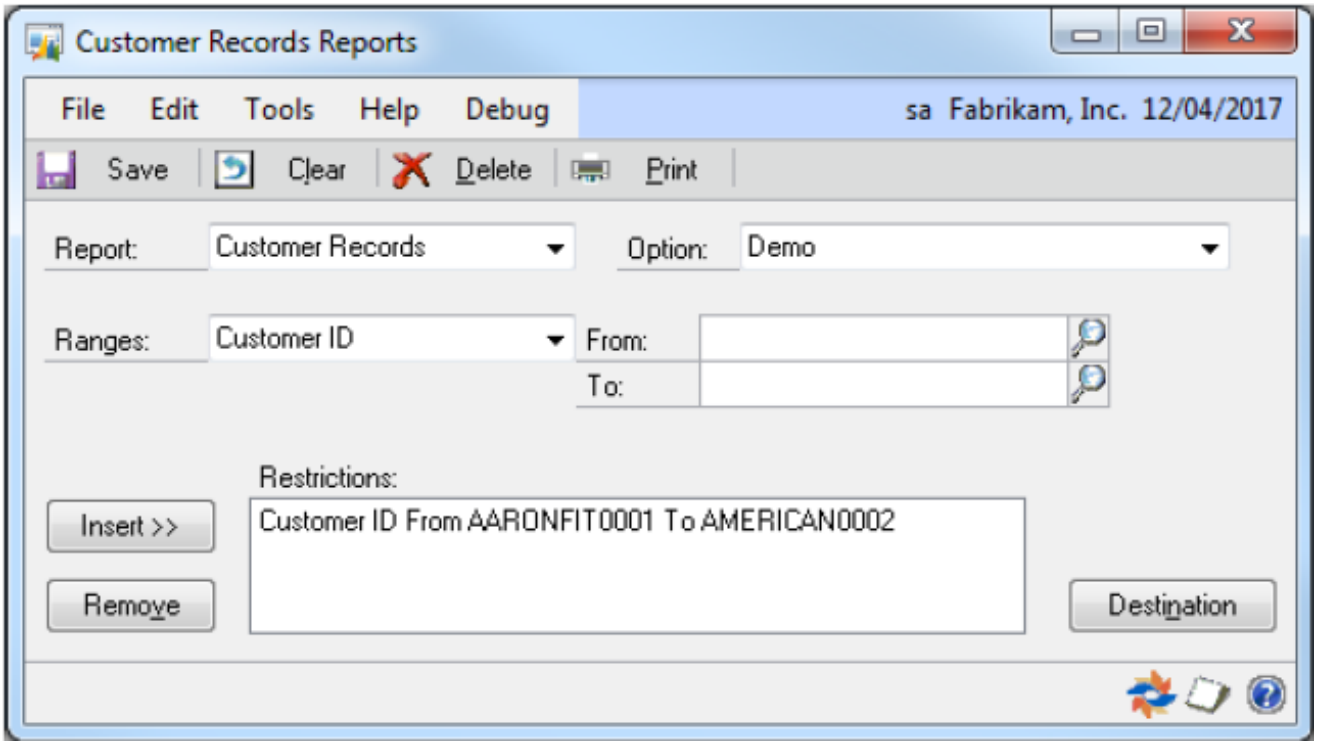
Location

Reports >> Sales >> Credit Control >> Customer Records Reports

Summary

The Customer Records Print window allows for printing of reports on the Customer Records and the Diary.

Layout



Processing

The Report field is used to select between the Customer Records report and the Diary report. Each of these have their own separate Options.

Ranges can be applied to the report on Date, Customer Number and on User ID.