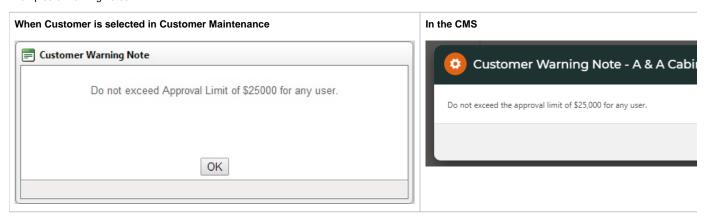
# **Customer Warning Notes**



Warning Notes are available from version 3.51 onwards.

Warning notes are maintained by site administrators.

Examples of warning notes:



Warning notes are displayed when:

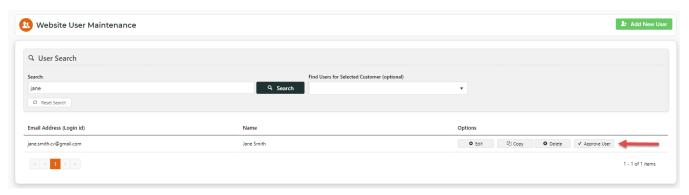
- a record is selected in Customer Maintenance
- the customer account is selected for a user in CMS
- a new self-registered user is being reviewed by the approver in the CMS

The benefit of warning notes in CMS is that when a default account is added or viewed in the Default Account field for a website user, each warning note from all accounts associated with the user will be displayed.

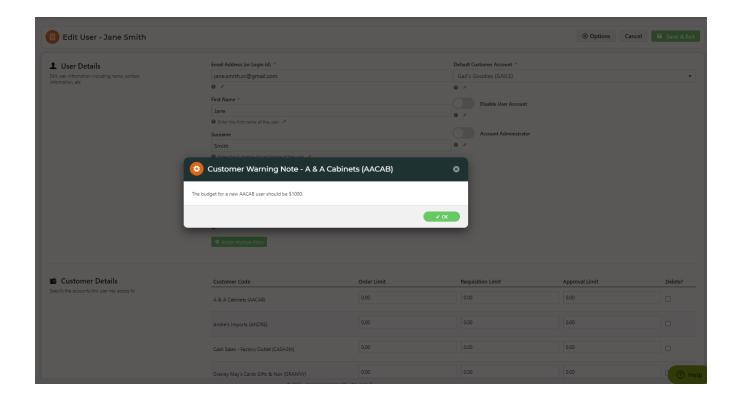
For the customer user approver, having relevant notes can assist the approval and final account setup process.

#### Example:

The approver clicks Approve User to finalise a new customer user who has registered on the website.



The approver is taken to the Edit User's page. But before they are able to edit, the customer warning note displays. Here, the note guides the approver on the user budget limit that should be entered.



### Step-by-step guide

#### 1. Enable Warning Notes

- 1. In the CMS or on the website, navigate to **Settings Settings** (/zSettings.aspx).
- 2. On the General tab, find and tick the Enable Customer Warning Note checkbox.
- 3. To save the setting, click the **Update** button.

#### 2. Add a Warning Note to a Customer

- In the Customer Maintenance screen (/CustomerMaintenance.aspx), search for the required customer.
   Click the Customer Details tab.
- 3. Click Modify.
- 4. In the Warning Note field, enter the warning text.

  unt Payment Adjustments:

aynote Recommendations : No Warning Note :

es (Moved to Setting Def) : No

Default Order Term :

Epoble Empil Approval + Vec

5. To save it, click **OK**.

## Related help

- Cost Centres
  Force User to Select Customer Upon Login
  Assign Multiple Customer Accounts to a User
  Add Cost Centre for Whole Order
  User Budgets