


Customer Warning Notes

 **Warning Notes** are available from version 3.51 onwards.

Warning notes are maintained by site administrators.

Examples of warning notes:


When Customer is selected in Customer Maintenance

 **Customer Warning Note**

Do not exceed Approval Limit of \$25000 for any user.

OK

In the CMS

 **Customer Warning Note - A & A Cabi**

Do not exceed the approval limit of \$25,000 for any user.

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.

 Website User Maintenance Add New User

User Search

Search:

jane

Search

Find Users for Selected Customer (optional)

Reset Search

| Email Address (Login id) | Name | Options |
|--------------------------|------------|---|
| jane.smith.cv@gmail.com | Jane Smith | <div><div>Edit</div><div>Copy</div><div>Delete</div><div>Approve User</div></div> |

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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.

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](#)