Customer Notes

Last Modified on 01/18/2023 5:25 pm EST

The Customer List Report is designed to print a listing of Customers Notes entered by Users.

Once the desired options have been selected on the report options form, click the OK button to display the report in Print Preview mode.

Report Selections

Branch - The default is to display data for All Branches. If the data for only certain Branches is desired, you may highlight the first Branch, then depress the CTRL key and highlight additional Branches within the list.

· *Hide Inactive Branches* - If data is not to be listed for inactive Branches, select this option.

· *Show Each Branch* - If this option is selected, a new group will begin with each unique Branch.

Date Range - you may enter a date range for the desired Customer Notes. Enter a From Date and a To Date. Only Customer Notes entered within the date range selected will print on the report. If no date range is specified, all notes from the beginning of time in SedonaOffice will be printed.

Customer Status - The report defaults to all options selected. you may select one or multiple Customer Statuses for the report.

Note Type - The report defaults to all Note Types. you may select one or multiple Note Types for the report.

Days Past Due - This option will default to Show All Customers. you may select one of the other options available which coincide with the accounts receivable aging buckets. If the 31 Days option is selected, all customers with outstanding balances in the 31 Days aging bucket or an older aging bucket will be listed on the report.

Sort By - The report default is to sort by Customer Number. Other sorting options available are Customer Name and Current Balance Due.

Only Show Customer With Notes - If this option is selected, on customers where notes have been entered will print on the report.