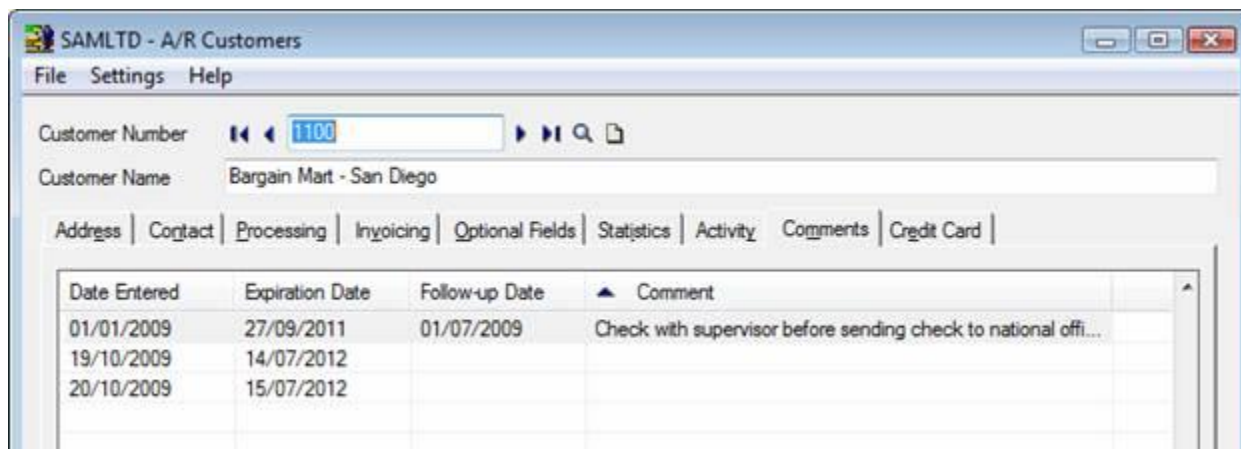


“Poor Man’s CRM” – Sage Accpac ERP AR Customer Comments

On the Comments tab of the of the AR Customers screen you can enter an unlimited number of comments, with each comment being up to 2,500 characters long.



Customer Comments can be used in many ways and for a variety of purposes to meet basic “customer relations management” requirements:

- track AR collections by using the “Follow Up Date” feature
- enter a comment about a customer complaint that is being investigated
- record a missing payment
- make a call to wish a contact “Happy Birthday”

Customer comments can be printed from the AR Customer reports and you can not only select a range of follow up dates but also ranges of customer numbers, groups, salespersons etc.

Accpac Tips and Tricks

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To make sure that comments are kept current, you can assign an expiration date for each comment. When you use the Customer Comments option in the Clear History form, comments that have reached the expiration date will be deleted.

You can incorporate comments – a simple and useful feature - in custom reports and macros to make the system meet many particular requirements.

For example:

- Use the customer comments in a macro to email each of your salespeople the comments pertaining to customers assigned to them
- Use the comments to print different messages on each customer's invoices without using different invoice specifications
- Print season specific messages on invoices and other reports without revising your crystal reports each time.
- Set up your comments to assign them specific priority and print the comment report sorted by priority
- Set up your comments so they are assigned to specific members of the accounting team

Comments are also available for vendors in the Accounts Payable module; they can be set up and used in similar ways.

For more information on using and customizing your Accpac system contact us at (416) 490-1339