

# Account Notes

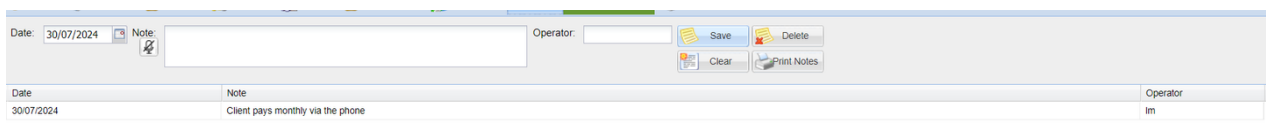
23/10/2024 3:59 pm BST

The Accounts Notes screen can be used to log any notes relating to a Client's Account.

## Details

### Adding an Accounts Note

1. Enter the Accounts Screen.
2. Select the 'Notes' button.
3. **Write the desired notes** in the 'note' box. or use the voice to text feature by clicking on the microphone.
4. Enter your **initials** into the 'operator' box and select the '**Save**' button.
5. The note will be added onto the system.

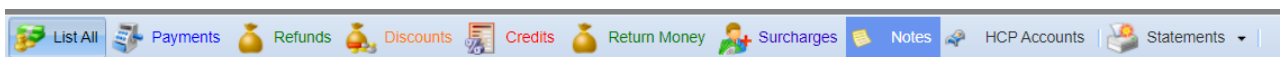


The screenshot shows the Accounts Notes interface. At the top, there is a header bar with a 'Date' field set to '30/07/2024', a 'Note' text area, and an 'Operator' field. To the right of these fields are buttons for 'Save', 'Delete', 'Clear', and 'Print Notes'. Below the header is a table with three columns: 'Date', 'Note', and 'Operator'. The table contains one row with the date '30/07/2024', the note 'Client pays monthly via the phone', and the operator 'lm'.

Date	Note	Operator
30/07/2024	Client pays monthly via the phone	lm

6. Users have the choice of the account note displaying in appointments within the diary via Administration > Settings > Diary and selecting 'Show Account Note in Booking'.

7. When an account note has been created, the 'Notes' icon will display in dark blue to indicate this.



### Print Account Notes

1. Enter the Accounts Screen.
2. Select the 'Notes' button.
3. Select the 'Print Notes' button.

### Deleting Account Notes

1. Enter the Accounts Screen.
2. Select the 'Notes' button.
3. Select the note you wish to delete.

4. Select the Delete button.

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