4.10 Customer Logs

**Understanding the Basics:**

Customer logs are a central Customer Relationship Management (CRM) tool. They are a user maintained history of what occurs with your customers or any data you want to record and track.

Customer logs are unlimited in length and number. Everything is date and time stamped, which helps to tell the story over time. You can categorize how the contact was made, use follow ups, search the customer logs and really use this tool to your benefit.

**Getting Started:**

To add a customer log entry, first find your customer. Whether you search your customers from the Quick Search or the Customer Homepage, every returned search result has a direct link to the customer log if you have the permissions. Click on their “[log]” link and then click the “[add new log entry]” link under the User-Maintained Customer Log Section. From the Customer Homepage and your main adilas homepage there are also links to directly search customer logs or check today’s logs or follow-ups.

There is also a detailed search option for searching customer logs from the advanced customer search page. This allows many options for adjusting the parameters to search your customer logs. If more help is needed finding or adding customers, please see the Customer section of the User Guide.

**Suggested Permissions and Settings:**

**Permissions:**

**Basic Use:**

 System Search Section: “Customer” – this permission populates your quick search with the customer option. This is one of the best tools for quickly searching customers and getting to customer information from any page in adilas. The user must also have at least the “Add/Edit Customer” permission to use the customer quick search function.

 System Basics Section: “Customer Logs” – this permission provides a quick link to search the customer logs section.

 System Maintenance Section: “Add/Edit Customer” – this permission is required for 3 main customer functions. First it allows the user to add/edit any customers, customer information, log files, follow-up records, and customer images/scans (if user has photo management permission). It is required to create “customer” invoices, quotes and shopping cart function for basic customer sales. If your corporation uses the queue, this permission is also required for a user to queue a customer.

**Admin Use:**

 System Maintenance Section: “Customer Admin” – as the admin permission for customers this allows the user to manage customer types, credit limits, exporting customer data to Excel and other settings.

**Related Pages & Help File Links:**

Customer/Contact Log: This is the main hub page for a customer and where you go to add customer log notes. This allows you to add/edit/view all of your customer data. From here click the link to “[add new log entry]” for adding customer logs, check the customer’s history, add contacts, add flex grid, check payment history, invoice history, and much more.

<https://www.adilas.biz/top_secret/help.cfm?id=318&pwd=log>

Add/Edit Customer Log: This is the actual page where you record the log entry. It is automatically date and time stamped or you can change that if needed. This page allows for unlimited log notes and the option to use follow-up fields.

<https://www.adilas.biz/top_secret/help.cfm?id=320&pwd=log>

Advanced Customer Search Results: Whether you just want to search the customer logs or really detail out your customer search, this is where you’ll come. When you click on the “customer logs” link it is actually just a filtered view of the advanced customer search page. The full page also has its own customer log search section.

<https://www.adilas.biz/top_secret/help.cfm?id=321&pwd=results>

**Additional Content:**

 -Graphics

-Screen Shot

-Etc.