

# WMS: Did You Know?

## From Professor Merlot



### Customer Notes – How to copy to Production Label?

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An important part of customer service is to ensure you and your staff are aware of your customers' preferences with their wine product production.

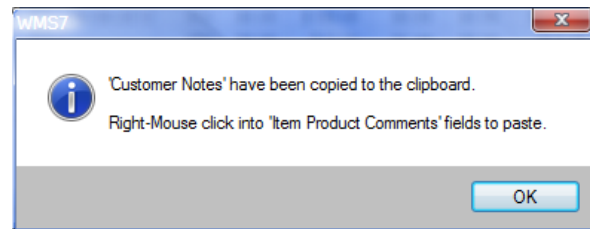
These are best saved in the **Customer Information** form in the **Notes** field. Currently, one area where these personal notes are on display for your staff, is on the Invoice (directly below the **Sold To** drop down box). Here's a new feature that quickly transfers the **Notes** information onto:

- An **Item Product's Comments** field
- The **Appointment Scheduler**
- The **Customer's History** report
- The **Production Label**

Here's how to do it:

1. Complete the order from your customer.
2. Move the **Horizontal Scroll Bar** below the **Price and Tax** columns, to the right, just enough to display the **Comments** field (next to the **Total** column).
3. **Double-click** with your mouse in any of the **Comments** fields that are showing.
4. The following message will indicate that the **Customer Notes**, in red lettering, has been saved onto the Windows Clipboard.
5. Press **OK** to continue.
6. In any of the **Comments** fields on this Invoice, **Right-Mouse click** once, to add these **Notes** from the clipboard, onto the specific **Item Product**.
7. This is a quick method to transfer your customer's preferences to be readily available for you and your staff, throughout WMS.

Qty	Item Product	Sale	Bottle Date	Disc%	Disc\$	Price	HST	GST	Total	Comments
2	6wk Equip Charge/Service			0%	\$0.00	\$40.00	\$9.60	\$0.00	\$89.60	
1	Sel White Merlot		09-09-2012	0%	\$0.00	\$109.95	\$0.00	\$0.00	\$109.95	
1	Neck Caps & Labels			0%	\$0.00	\$12.00	\$1.44	\$0.00	\$13.44	
1	Wine Crate - 1			0%	\$0.00	\$22.00	\$2.64	\$0.00	\$24.64	
1	Sel Chard Semm		09-09-2012	0%	\$0.00	\$105.95	\$0.00	\$0.00	\$105.95	
1				0%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	



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