

Memos / Alarms and Narratives

The Memos and Alarms function allows you to store information and messages associated with data in your Accredo system. Memos and alarms can be associated with:

- **Records** which are identified by codes, such as master files and analysis codes,
- **Users**, where they are used to store information relating to a particular user,
- **Companies**, where they are used to store global information relating to the company.

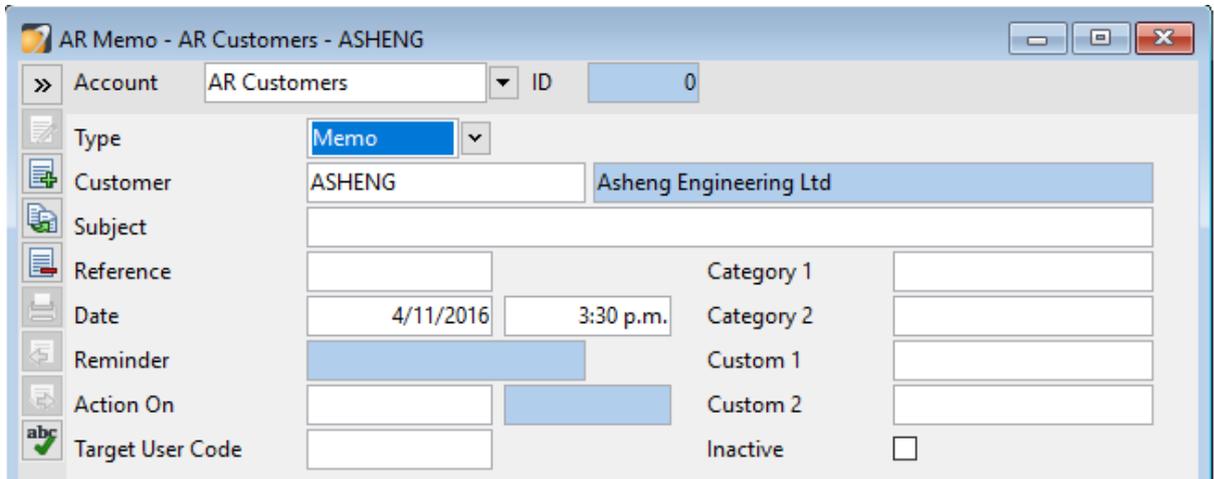
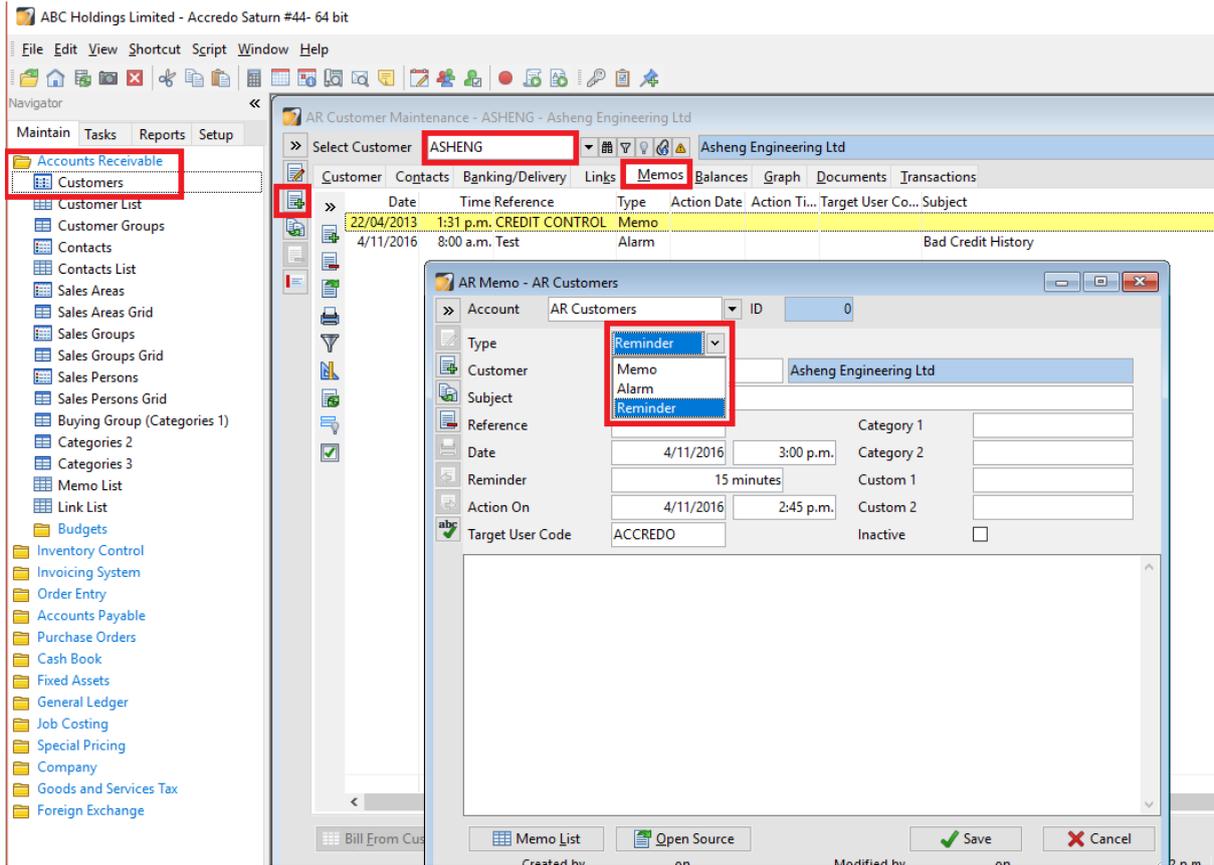
A memo stores information against a record for selective reviewing. Conversely, an alarm is displayed automatically when pre-defined conditions are met

To open the memo grid open the relevant form to apply a memo to (For example, the customer master file)

- Select the record to add a memo or alarm to (eg select customer)
- Click on the Memos Tab
 - o The following screen is displayed

Date	Time Reference	Type	Action Date	Action Ti...	Target User Co...	Subject
22/04/2013	1:31 p.m. CREDIT CONTROL	Memo				
4/11/2016	8:00 a.m. Test	Alarm				Bad Credit History

Click on  Insert (F4) to add a new Memo, Alarm or Reminder



- **Reference:** Add a reference for the user (eg Credit warning)
- **Target User Code:** Specify the user or user group the memo/alarm will be visible to. If left blank, the memo/alarm will be visible to all users.
- **Type:** If you wish this memo to be displayed every time the record (customer) is selected then change the 'Type' to Alarm
- **Action on:** For an alarm, this specifies the date on which you want it to take effect as follows. If no action on date is entered the alarm will flash on screen every time the code is selected.
- Click Save  Save (F9)

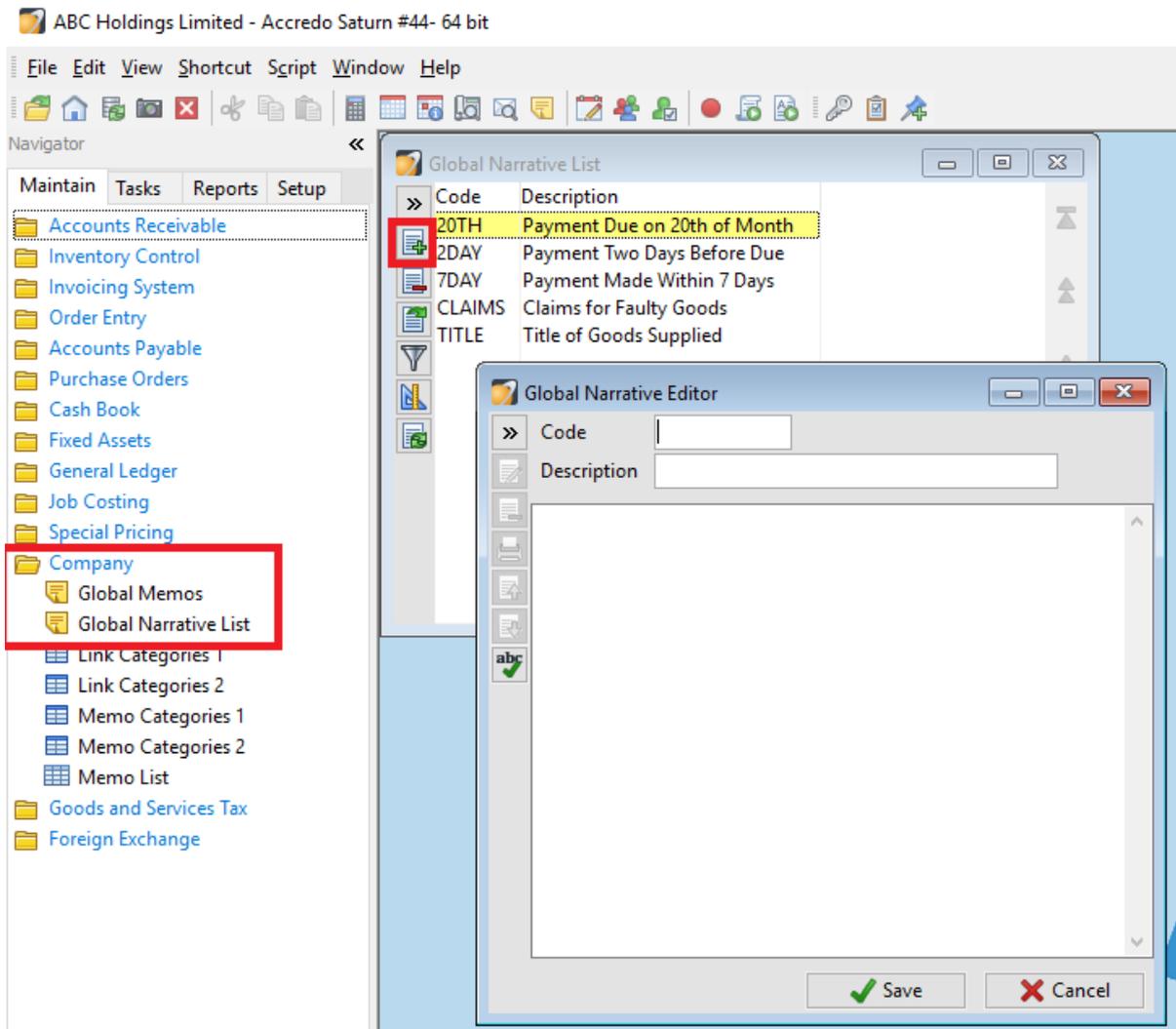
Global Memos / Narratives

The global memos are setup the same as the memos and alarms above. The global memo however, is activated when the company is open (as opposed to when a record is selected).

The global narratives option allows you to add and maintain global narratives, which can be inserted in [Invoicing System Enter Invoices](#), [Order Entry Enter Orders](#), [Purchase Orders Enter Orders](#) and [Job Costing Job Maintenance](#).

- Maintain_ Company_ Global Narrative List

- Click 'Insert'  (F4)



- Enter a code
 - **Note:** As these narratives are company wide, we suggest that you use the 'Users' initials as part of the coding structure. This will help to determine who has added these codes.
- Enter a description for the narrative
- Enter the text to be inserted when this narrative is selected
- Click 'Save'  (F9)