

Note Details Screen

← **LALCO**
LARG ASEAN LEADING PUBLIC COMPANY

Note Details
Add Your Note Details

Customer Name
Search by name, phone, or loan ID

Contract Number
Search contract number

Subject
Note subject or title

Date
Mar 19, 2026

Note Details
Enter your note here...

Save

Home Tasks Sales Legal Team Customers

Overview

The **Note Details Screen** allows staff to create and save notes related to customers, contracts, and follow-ups. It helps track important interactions and maintain proper records.

Access Path

Home → Add Note

Note Details Form

Overview

Provides input fields to create a new note linked to a customer and contract.

Header Section

Page Title

Note Details

Description

Add your note details

Book Icon

- Represents note/document management
-

Input Fields

1. Customer Name

Search by name, phone, or loan ID

- Search and select a customer
 - Supports:
 - Customer name
 - Phone number
 - Loan ID
-

2. Contract Number

Search contract number

- Dropdown or searchable field
 - Links note to a specific contract
-

3. Subject

Note subject or title

- Short title describing the note
-

4. Date

Mar 19, 2026

- Default is current date
 - May be editable
-

5. Note Details

Enter your note here...

- Main content of the note
- Used for:
 - Call summaries

- Customer updates
 - Follow-up actions
-

Action Button

Save Button

- Label: **Save**
 - Function:
 - Stores the note
 - Links it to selected customer and contract
-

How to Use

Create a Note

1. Open **Note Details**
 2. Search and select a **Customer**
 3. Select **Contract Number**
 4. Enter a **Subject**
 5. Verify or update the **Date**
 6. Enter detailed information in **Note Details**
 7. Tap **Save**
-

Validation Rules (Recommended)

- Customer selection is **required**
- Contract number is **required**
- Subject should not be empty

- Note details must contain meaningful content
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Success State

Note saved successfully

Error States

Please fill all required fields

Failed to save note. Try again

Tip:

Use notes immediately after calls or customer visits to ensure **accurate tracking and better follow-up management.**

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