

# Notes Tab

Last Modified on 11/07/2016 2:31 pm EST

Add internal notes about the customer in this tab.

## Add Customer

## Add Note

Click Add Note on the left side of the page.

Invoices	Credits	Sites/Sys	RMR	Work Orders	Proposals	Payments	CC/eCheck	Notes	Contacts	Docs	Archive
28	4	7	20	31	3	115	89	6	7	5	0

Notes						
<b>+ Add Note</b>						
Note	Modified	Modified By	Type	Expiration		
referred new customer owe a month FEE MONTH 5/1	6/3/2016 11:32 AM	Savani, Barbie	Critical	6/10/2016 12:00 AM		

## Complete Fields

Complete note fields.

Note	Modified	Modified By	Type	Expiration		
	8/1/2016 11:49 AM		Stan...			

## Note Content

Enter the note's content in the white box under the "Note" header.

## Type

Select note type from the dropdown box.

### Standard

This is an internal note at the customer level.

### Critical





This is an internal note at the customer level that will appear every time you open the Customer Manager Page.

## Expiration

"Expiration" only applies to critical notes. Select the date and time you would like the note to expire. The note will no longer appear everytime you open the Customer Manager Page after this date.

## Save

Click the check mark on the right side of the screen to save.

Note	Modified	Modified By	Type	Expiration	
	8/1/2016 11:49 AM		Stan...	 	 

## Editing a Note

Click the pencil icon to the right of the note you would like to edit.

Invoices	Credits	Sites/Sys	RMR	Work Orders	Proposals	Payments	CC/eCheck	Notes	Contacts	Docs	Archive
28	4	7	20	31	3	115	89	6	7	5	0

Note	Modified	Modified By	Type	Expiration	
referred new customer owe a month FEE MONTH 5/1	6/3/2016 11:32 AM	Savani, Barbie	Critical	6/10/2016 12:00 AM	