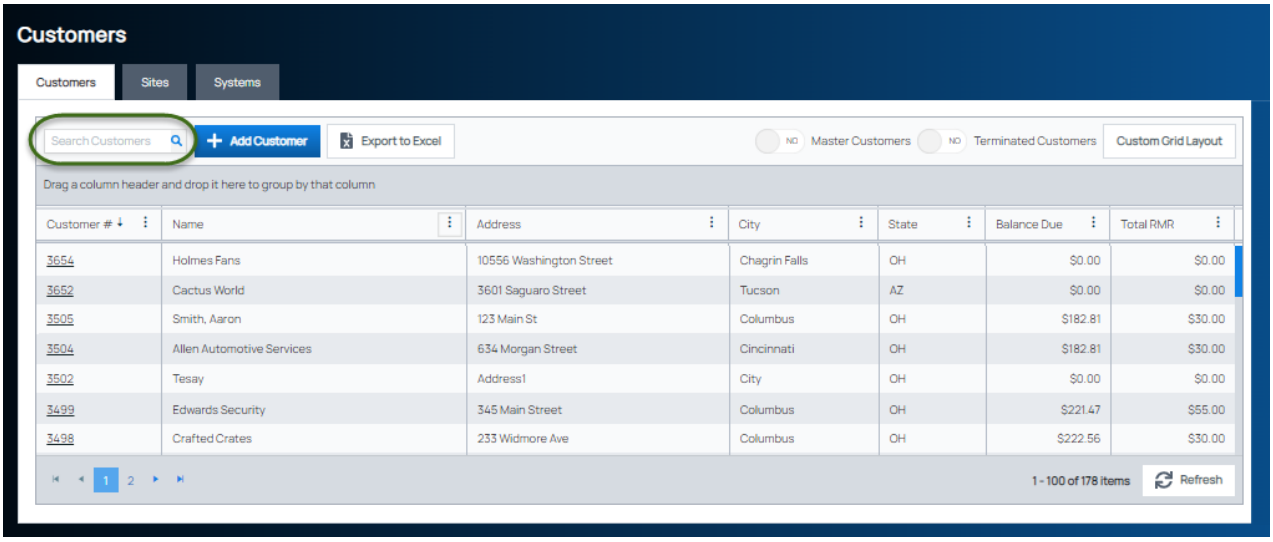
Edit Customer Notes

Last Modified on 12/12/2024 1:15 pm EST

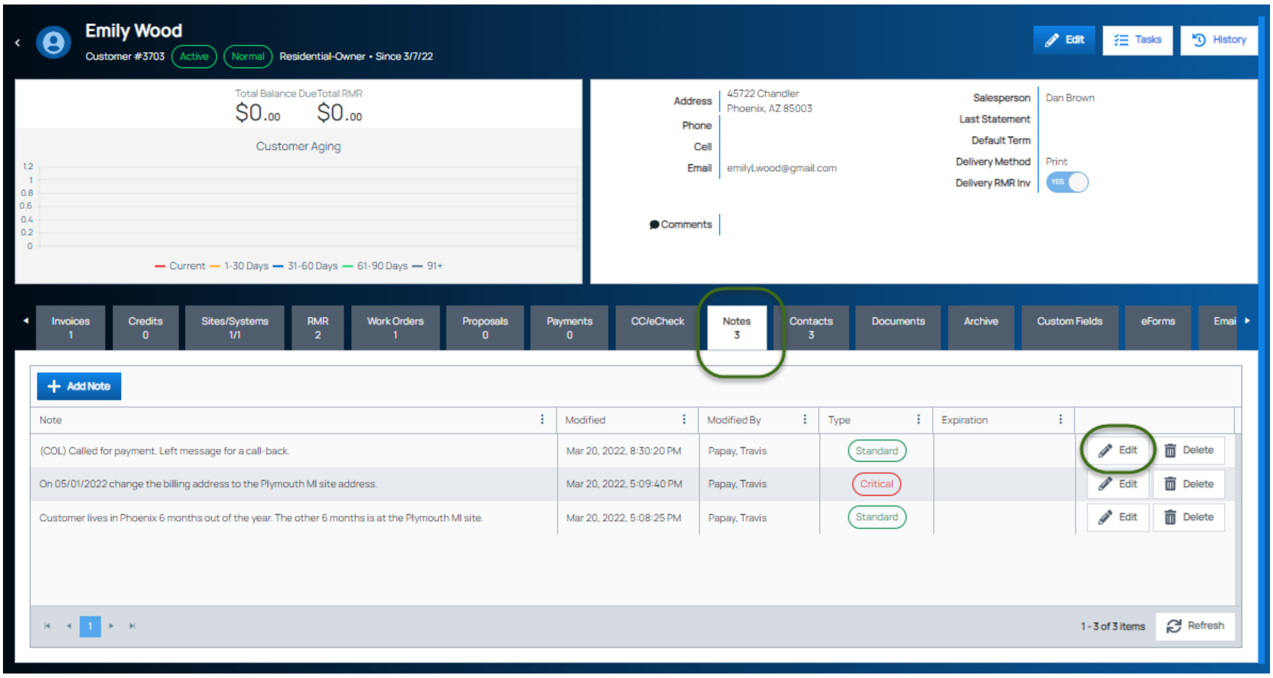
To edit a Customer Note, you must first access the customer record.

From the main menu, arrive at the Customers list with this path: CRM > Customers.

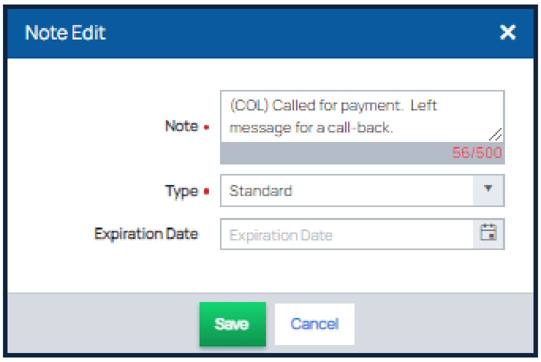
The Customers list will be displayed. Locate the customer in the list, and then click on the hyperlink in the Customer # column to open the customer record.



The Customer record will be displayed. Click on the Notes tab. Locate the Note you want to edit, and then click on the Edit button (pencil icon).



The Note Edit form will be displayed. Make the necessary changes, and then click the Save button when finished.


Note Edit
Note
(COL) Called for payment. Left message for a call-back.
56/500
Type
Standard
Expiration Date
Expiration Date
Save
Cancel