

Notes Tab

Last Modified on 08/18/2025 10:18 pm EDT

The Notes tab displays all Notes on file for the customer.

Add Note Button

Clicking the Add Note button opens a form for entering a new note for the customer.

Edit Button

Clicking the Edit button opens the note for viewing and/or editing.

Delete Button

Clicking the Delete button permanently deletes the note.

ents0

CC/eCheck47

Notes4

Contacts11

Documents4

Collections

Archive1



Custom Fields

Item Defaults2

eForms0

Emails

+ Add Note

Note	Access Level	Created	Modified	Modified By	Type	Est Length	
+ test2	Internal	4/20/23, 11:32 AM	4/20/23, 11:32 AM	Munteanu, Raz	Standard		<div><div> Edit</div><div> Delete</div></div>