

Notes Tab

Last Modified on 04/18/2022 4:10 pm EDT

The Notes tab will display all Notes on file for the customer.

Add Note Button

Clicking on the Add Note button will open a form for entering a new note for the customer.

Edit Button

Clicking on the Edit button will open the note for viewing and/or editing.

Delete Button

Clicking on the Delete button will permanently delete the note.

The screenshot displays the customer profile for Emily Wood (Customer #3719). The profile includes a header with the customer's name, status (Active, Normal), and residential ownership details. Below this, there are two main sections: financial data and contact information. The financial data section shows a Total Balance Due of \$822.71 and a Total RMR of \$120.00, along with a Customer Aging bar chart. The contact information section lists the address, phone, cell, and email, as well as salesperson and delivery details. A navigation bar at the bottom of the profile shows various tabs, with 'Notes' currently selected. The Notes tab displays a table with one note: 'Customer stays at their Florida home from October to April.' The note is dated April 18, 2022, and was modified by Papay, Travis. The note type is 'Standard'. The table includes 'Edit' and 'Delete' buttons for each note. At the bottom of the page, there is a pagination control showing '1' of 1 items and a 'Refresh' button.

Note	Modified	Modified By	Type	
Customer stays at their Florida home from October to April.	Apr 18, 2022, 1:25:34 PM	Papay, Travis	Standard	Edit Delete