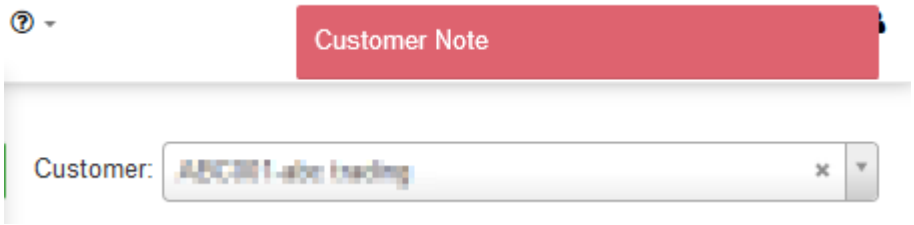
Customer notes can be set up to pop up automatically each time the Edit Customer screen is opened up.

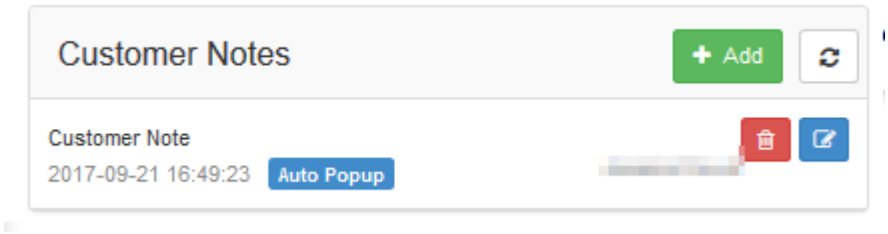
The auto popup customer note will look similar to this example. It will show at the top right of the Edit Customer screen.



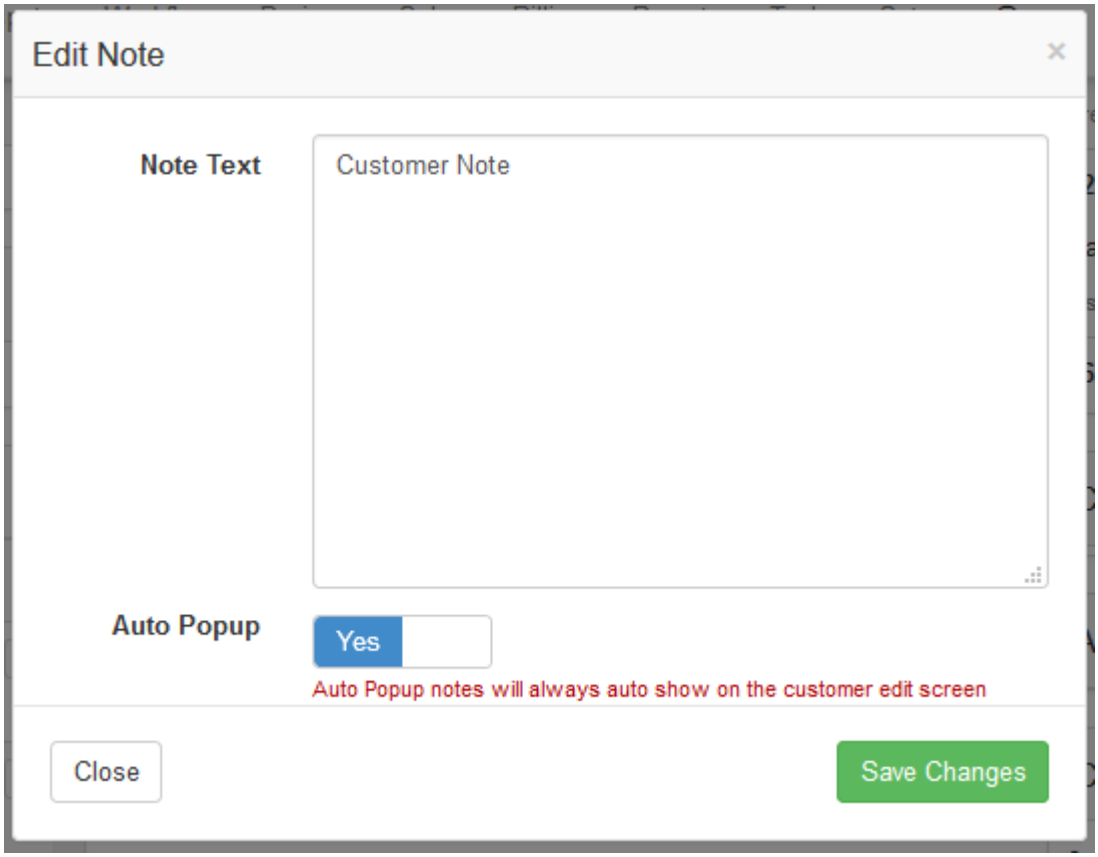
Go To Customers –> List Customers –> Edit Customer

In the right column of the Edit Customer screen you can find the Customer Notes block.

This will show all customer notes. Each one of them can be set up to automatically pop up or not.



To enable auto popup on a customer note, simply set the “Auto Popup” field to Yes when editing or creating a customer note.


Edit Note
Note Text
Customer Note
Auto Popup
Yes
Auto Popup notes will always auto show on the customer edit screen
Close
Save Changes