

Updating Customer Critical Notes

05/31/2024 11:55 am EDT

Step 1 - Go to Customer's Account Page

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Step 2 - Scroll down to Account Information section, and click the edit icon next to "Critical Notes"

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Step 3 - Type the message you would like to alert into the Critical Notes box. *Please date the message to ensure anyone who accesses the customer's account can view the most recent update*

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Step 4 - To ensure the Alert notification bar pops up, you will need to click the checkbox for "Alert" right under the Critical Notes box.

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Step 5 - Review your note and click "save" at the bottom of the page to save any changes made.

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Changes are now completed and the alert notification bar will now pop up and display the Critical Notes for the customer's account, as shown below.

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