

How to a Create a Critical Customer Message

Last Modified on 09/13/2024 3:41 pm EDT

When a customer needs special care, attention or anything that needs to get a user's attention to address, when accessing a customer account, a user can create a pop-up message with an important message for a user to address or follow. Below is an example of a critical message.

The settings for the message are in the Customer Information>Customer Setup screen- example 2nd pic below.

Customer Information

Miguel Gutierrez
8904 Kiowa Dr
Greenville, TX 75402 - 2813
migerica@att.net

Balance Due: \$32,267.05
Last Statement Date: 5/16/2024
Last Late Fee: \$2,062.15
* Promise to Pay * 15 Days Past Due

Total Active RMR :
Total Active RAR :
Customer Type: Residential
Customer Since: 10/11/2022
Salesperson: Queen NDUji
Last Payment Rec'd: \$200.00 (9/28/2023)
of Disp Last 30 Days: 0

Title	Contact	Phone	Ext	E-Mail
	Miguel Alfaro			migerica...
	Miguel Gutierrez			miguel.gu...
Da Cobra	Mr. Miguel Gutierrez			mrs_elg@...

Open Invoices: \$32,267.05

Description	Date	Amount	Net Due	Late Fee
Equipment Sales	9/25/2023	\$32,333.33	\$32,133.33	\$0.00
Equipment Sales	9/25/2023	\$32.63	\$32.63	\$0.00
Equipment Sales	4/29/2024	\$1.09	\$1.09	\$0.00
Equipment Sales	5/27/2024	\$100.00	\$100.00	\$0.00

Credit Type	Date	Amount	Balance
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Critical Message

Entered By: Administrator
Entered Date: 6/29/2024
Expires: 7/4/2024
Do not call before 6am CST

Customer Setup 49706

Customer # 49706 Miguel Gutierrez
Customer Name Miguel Gutierrez 8904 Kiowa Dr
Additional Name Greenville, TX 75402 - 2813

Setup Information | Custom Fields (Customer) | Bill To | Master Account Setup | Items

Customer Status ANR Blanket P.O.
Customer Type Residential P.O. Expire Date
Old Customer ID Customer Since 10/11/2022
Terms Net 30 Chain Account
Tax Exempt # Example 123 Customer Group MI
EIN Customer Group 2
OK to Increase Branch MI
Salesperson TestUser Invoice Group Oklahoma Tax
Commission Pctg 0.00 No Collections
Registration Code 80F470 Part Pricing Level None

Master Account Information Invoice Printing

Is Master Account
Account Index 0 (For Auto Numbering)
 Print Statements
 Print Site Info on Invoices
 Separate Cycle Invoice for Each Site
 Default New Sub-Accounts to Bill to Master Account
 Charge Late Fees

Critical Message
Expires On 7/4/2024
Do not call before 6am CST

Save Close