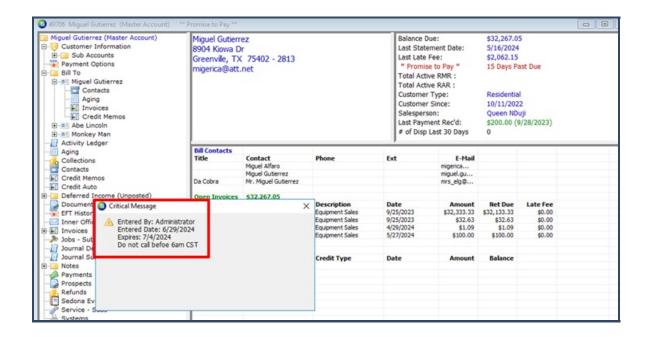
How to a Create a Critical Customer Message

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 # 49706			Miguel Gutierrez		
Customer Name	liguel Gutierrez		 8904 Kiowa Dr Greenville, TX 75402 - 2813 		
Additional Name					
tup Information Cu	ustom Fields (Customer	r) Bill To Ma	ster Account Setup	Items	
Customer Status	ANR	-	Blanket P.O.	[
Customer Type	Residential	-	P.O. Expire Date	, 	
Old Customer ID			Customer Since	10/11/2022	
<u>T</u> erms	Net 30	-	Chain Account	[
Tax Exempt #	Example 123		Customer Group	MI	• • • •
EIN			Customer Group 2	, 	-
OK to Increase			Branch	MI	•
Salesperson	TestUser	- 8	Invoice Group	Oklahoma Tax	•
Commission Pctg	0.00		No Collections		
Registration Code	80F470	C	Part Pricing Level	None	•
aster Account Inform	nation		voice Printing		
Account Index	Is Master Accoun (For Auto Nu Default New Sub- to Bill to Master A	mbering) Accounts	 ✓ Print Statements ✓ Print Site Info on Invoices ✓ Separate Cycle Invoice for Each Site ✓ Charge Late Fees 		
itical Message Expires On 7/4/20					
Do not call befoe	5am CST				
				Save	Close