



Handy guides



Keeping private data about my customers

Additional information

I can keep track of information about my customers without sharing it with other Retailers when they access a record using the secret question.

1. The **NOTES** tab is used to store information that will be visible to **anyone** having access to this customer account.
2. If you want to store info which will not be shared, Click on **Additional information**.

3. All information stored here is **only visible** to your retailer. You can use the **Comment** field to enter more text if needed.

4. Further down the page , I can use the **Files** section to upload and store documents linked to the customer. These files will be visible to my **Retailer Also**.