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.