The following Options Configuration settings should be reviewed prior to using Customer Activity Notes and the related viewer.



**Option ID 3600 ‘Eagle for Windows Customer Activity Notes on system’:** This option must be set to Yes by the Epicor Licensing department. Contact your Customer Account Manager with any questions.

**Option ID 3602 ‘Default Customer Activity Note Type when entering new cust act. notes’:** Sets the default Note Type that populates when adding new notes.

**Option ID 3604 ‘Default Customer Activity Note Priority when entering new cust act. note’:** Sets the default note Priority that populates when adding new notes.

**Option ID 3606 ‘Customer Activity Note Types that are hidden’:** You can list the Note Types that cannot be seen such as sensitive Collection types or Contract Negotiations. You can set this by Terminal.

**Option ID 3608 ‘Display Customer detail when entering new customer activity notes’:** This setting determines if only the Customer Number and Name are displayed versus more information on the Viewer header.

In order for a person to access and use and modify the Customer Activity Notes they need to have security Bit 728 and 786 authorized.

