

Add Customer Notes

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Notes can be added in several customer related areas of the application including:

- Customers
- Sites
- Systems
- Work Orders

When entering a Note, it should be entered on the entity that is most logical. From example, billing related notes should be saved at the Customer level, whereas system related notes should be saved at the System level.

To add a Customer Note, you must first access the customer record. From the main menu, arrive at the Customers list with this path: CRM > Customers.

The Customers list opens. Locate the customer in the list, and then click the hyperlink in the Customer # column to open the customer record.

The screenshot shows the 'Customers' list interface. At the top, there are tabs for 'Customers', 'Sites', and 'Systems'. Below the tabs is a search bar labeled 'Search Customers' and a blue button labeled '+ Add Customer', which is circled in green. To the right of the search bar are radio buttons for 'Master Customers' and 'Terminated Customers', and a 'Custom Grid Layout' button. Below this is a table with columns: Customer #, Name, Address, City, State, Balance Due, and Total RMR. The table contains several rows of customer data. At the bottom of the table, there is a pagination bar showing '1 - 100 of 178 items' and a 'Refresh' button.

The Customer record opens. Click on the Notes tab, and then click the **Add Note** button.

The screenshot shows the customer record for '1 - Emily Wood'. At the top, there is a header with the customer name and 'Active' status. Below the header is a navigation bar with tabs for 'Notes', 'Systems', 'RMR', 'Work Orders', 'Site Parts', 'Contacts', 'Zones', 'Authorities', 'Docs', 'Custom Fields', 'Item Defaults', 'eForms', 'Part Ledger', and 'External'. The 'Notes' tab is selected and circled in green. Below the navigation bar is a table with columns: Note, Modified, Modified By, Type, and Expiration. The table contains two rows of notes. The first row has a note 'Do Not Park in the customer's driveway!' with a 'Critical' type. The second row has a note 'This is the Site note for the Phoenix location.' with a 'Standard' type. At the bottom of the table, there is a pagination bar showing '1 - 2 of 2 items' and a 'Refresh' button.

The Note Edit form opens. Each data entry field is described below.

Data Entry Fields

Data entry fields preceded with an asterisk are required.

- ***Note:** Type in the note. Maximum of 500 characters allowed.
- ***Type:** Make a selection from the drop-down list – either Critical or Standard. You may save multiple notes with the Critical Type.
 - **Critical Type** – If the note is saved with this type, whenever the Customer record is accessed, this note will pop-up on the page.
 - **Standard Type** – This type is selected for non-critical notes.
- **Expiration Date:** If you selected Critical in the type field, and you want this note to stop popping-up after a certain period of time, then enter the end date for the critical note.
- **Show on Work Order:** If this is set to YES, the note will appear when opening a work order for the customer. If there are multiple notes that should appear on the work order, each note will appear in its own line.

i When entering notes, you may want to develop a coding system to identify the purpose of a note. In our example below, we have preceded the note text with (COL) to identify this note is collections related. When filtering the notes list, it is easier to find all collection notes.

The screenshot shows a form titled "Add Note" with a close button (X) in the top right corner. The form contains the following fields:

- Note:** A text input field containing "Customer note that should appear on the work order". A red character count "50/5000" is visible at the bottom right of the text area.
- Type:** A dropdown menu with "Standard" selected.
- Access Level:** A dropdown menu with "Internal" selected.
- Expiration Date:** A text input field with "Expiration Date" and a calendar icon.
- Show on Work Order:** A toggle switch set to "YES".

At the bottom of the form are two buttons: "Save" (with a checkmark icon) and "Cancel".

When finished filling in the form, click the **Save** button at the bottom of the form.
