

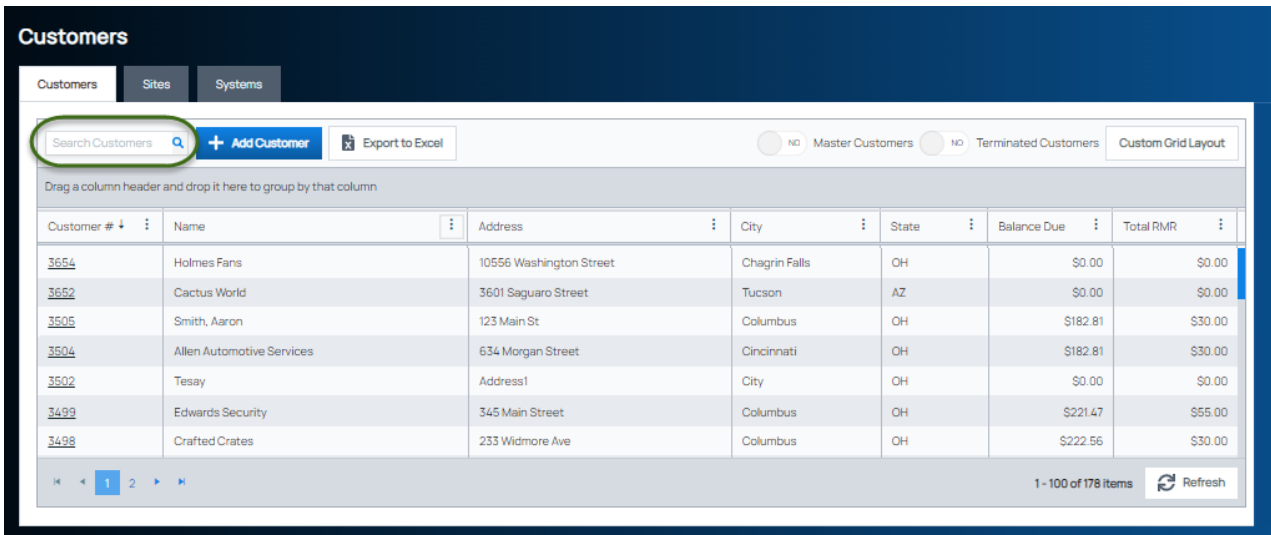
Add Site Notes

Last Modified on 12/12/2024 1:36 pm EST

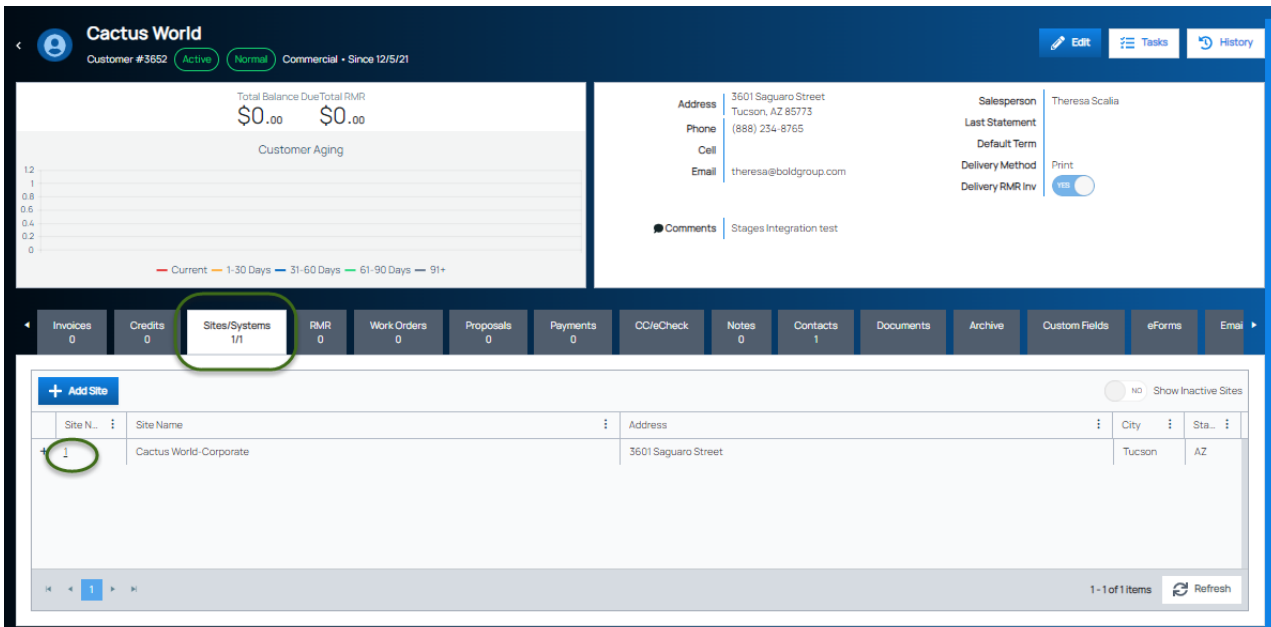
To add a Site Note, you must first access the customer record.

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 on the hyperlink in the Customer # column to open the customer record.



The Customer record opens. Click on the Sites/Systems tab, and then in the Site Number column, click on the hyperlink of the Site to which you want to add a note.



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

1 - Emily Wood
Active Emily Wood - 3703

45722 Chandler, Phoenix, AZ 85003
emilylwood@gmail.com

RMR \$2.00

Warranty Start: 03/07/2022
Warranty Labor: 1 Year Parts & Labor
Warranty Part: 1 Year Parts & Labor
Service Level: SVC T&M RES

Sales Tax: No Tax
Tax Rate: 0.0000%
Tax Exempt: -
Site Since: 03/07/2022
Inactive Date: -

Notes: 2 | Systems: 1 | RMR: 2 | Work Orders: 1 | Site Parts: 0 | Contacts: 1 | Zones: 0 | Authorities: 0 | Docs: 0 | Custom Fields: 0 | Item Defaults: 0 | eForms: 0 | Part Ledger: 0 | External: 0

+ Add Note

Note	Modified	Modified By	Type	Expiration
Do Not Park in the customer's driveway!	Mar 20, 2022, 8:40:27 PM	Papay, Travis	Critical	
This is the Site note for the Phoenix location.	Mar 20, 2022, 5:10:38 PM	Papay, Travis	Standard	

1 - 2 of 2 items Refresh

The Note Edit 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 can 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 when accessing the site record.
 - 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.

Note Edit

Note • (COL) Called for payment. Left message for a call-back. 56/500

Type • Standard

Expiration Date Expiration Date

Save Cancel

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