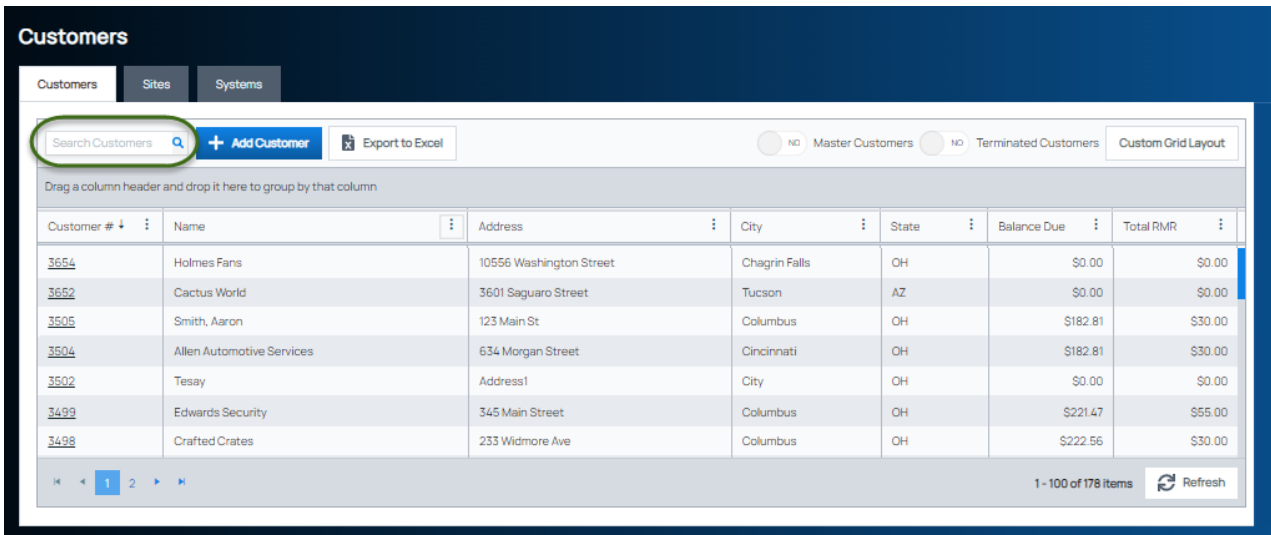# Add Site Notes

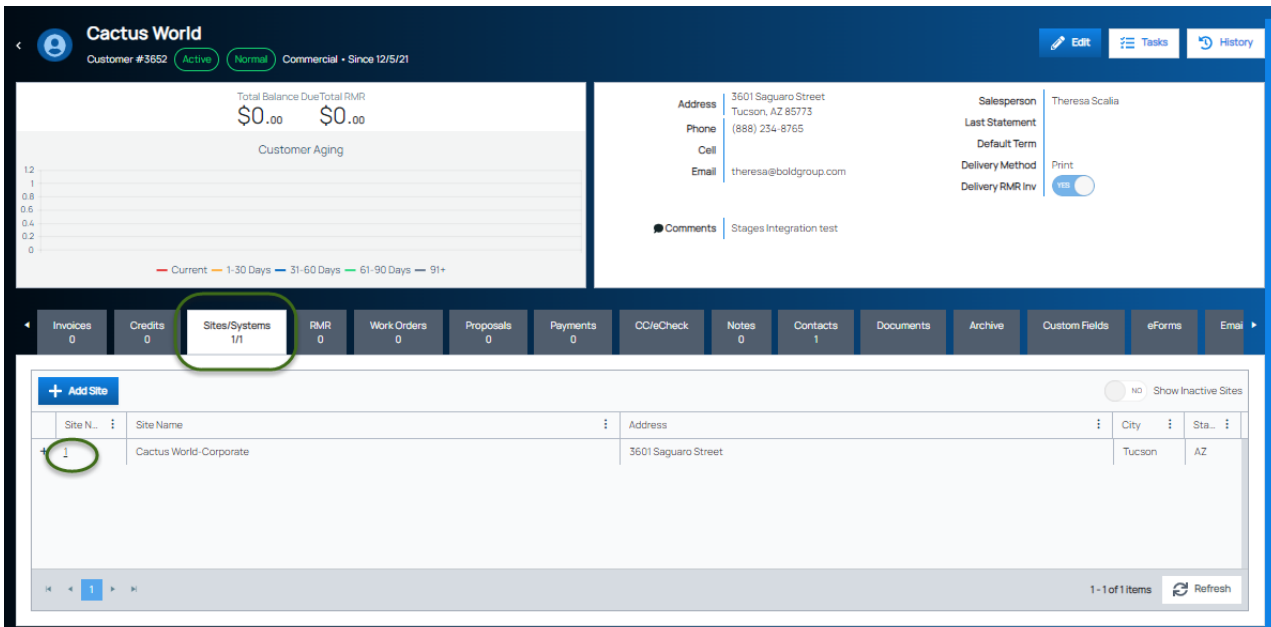Last Modified on 12/12/2024 1:36 pm EST

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.

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.

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