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.

| ustomers Site | es Systems | | | | | | | |
|----------------------|----------------------------------|-----------------|-------------------------|---|---------------|--------------|---------------------|--------------------|
| Search Customers | Add Customer | Export to Excel | | | NO Master Cus | tomers NO Te | erminated Customers | Custom Grid Layout |
| Drag a column header | and drop it here to group by the | at column | | | | | | |
| Customer # 🕴 : | Name | : | Address | 1 | City : | State : | Balance Due : | Total RMR |
| 3654 | Holmes Fans | | 10556 Washington Street | | Chagrin Falls | он | \$0.00 | \$0.00 |
| 3652 | Cactus World | | 3601 Saguaro Street | | Tucson | AZ | \$0.00 | \$0.00 |
| 3505 | Smith, Aaron | | 123 Main St | | Columbus | OH | \$182.81 | \$30.00 |
| 3504 | Allen Automotive Services | | 634 Morgan Street | | Cincinnati | OH | \$182.81 | \$30.00 |
| 3502 | Tesay | | Address1 | | City | OH | \$0.00 | \$0.00 |
| 3499 | Edwards Security | | 345 Main Street | | Columbus | ОН | \$221.47 | \$55.00 |
| 3498 | Crafted Crates | | 233 Widmore Ave | | Columbus | OH | \$222.56 | \$30.00 |

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.

| | | Cactus Wor Dustomer #3652 | | ommercial • Since 12/5/21 | | | | | | | | 🥒 Edit | ž≣ Tasks | 3 History |
|---|--------------------------|------------------------------|----------------------|---|---------------|------------|-------------------------------|-------------------------------------|---------------|-----------|--|-------------------|------------------|--------------|
| 1.2 1 0.8 0.6 0.4 0.2 0 | | | \$0.00 | ve DueTotal RMR \$0.00 mer Aging | | | Address Phony Ce Ema | Tucson, 1 (888) 23 theresa(| | | Salesperson Last Statemen Default Term Delivery Methor Delivery RMR In | t n d Print | lia | |
| | Invoices 0 + Add S | Credits 0 | sites/Systems 1/1 | 31-60 Days — 61-90 Days — 91- RMR Work Orders 0 0 | Proposals Pay | ments 0 | CC/eCheck | Notes 0 | Contacts 1 | Documents | Archive | Oustom Fields | | Emei 🕨 |
| | Site N. | : Site Name | orld-Corporate | | | : | Address 3601 Saguaro Stre | et | | | | i | City : Tucson | Sta_ : AZ |
| | н « 1 | н н | | | | | | | | | | 1-1 | of1items | Refresh |

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

| I - Emily Wood Active Emily Wood - 3703 45722 Chandler, Phoenix AZ 85003 emilyLwood@gmail.com | ^{RMR} \$2.00 | | | Warranty: Warranty L Warranty Service I | abor 1 Year Parts & Lat Part 1 Year Parts & Lat | | Tax Si | eles Tax No Tax ales Tax No Tax ax Rate 2.00009 2. Exempt - 03/07/20 vive Date - | 6 | ks 🎦 Histor |
|--|----------------------------|------------|--------------------|--|--|---------------|------------|---|------------------|-------------|
| Notes Systems RMR Work Orders 2 1 2 1 | Site Parts Contacts 0 1 | Zones 0 | Authorities 0 | Docs | Custom Fields | Item Defaults | eForms | Part Ledger | External | |
| + Add Note | | | | | | | | | | |
| Note | | E 1 | Modified | ÷ | Modified By | Туре | Expiration | : | | |
| Do Not Park in the customer's driveway! | | , | Mar 20, 2022, 8:40 | :27 PM | Papay, Travis | Critical | | | J Edit | Delete |
| This is the Site note for the Phoenix location. | | , | Mar 20, 2022, 5:10 | 38 PM | Papay, Travis | Standard | | | J Edit | Delete |
| | | | | | | | | | | |
| H 4 1 > H | | | | | | | | | 1 - 2 of 2 items | C 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 |
| Туре • | Standard | • |
| Expiration Date | Expiration Date | |
| | Save Cancel | |

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