

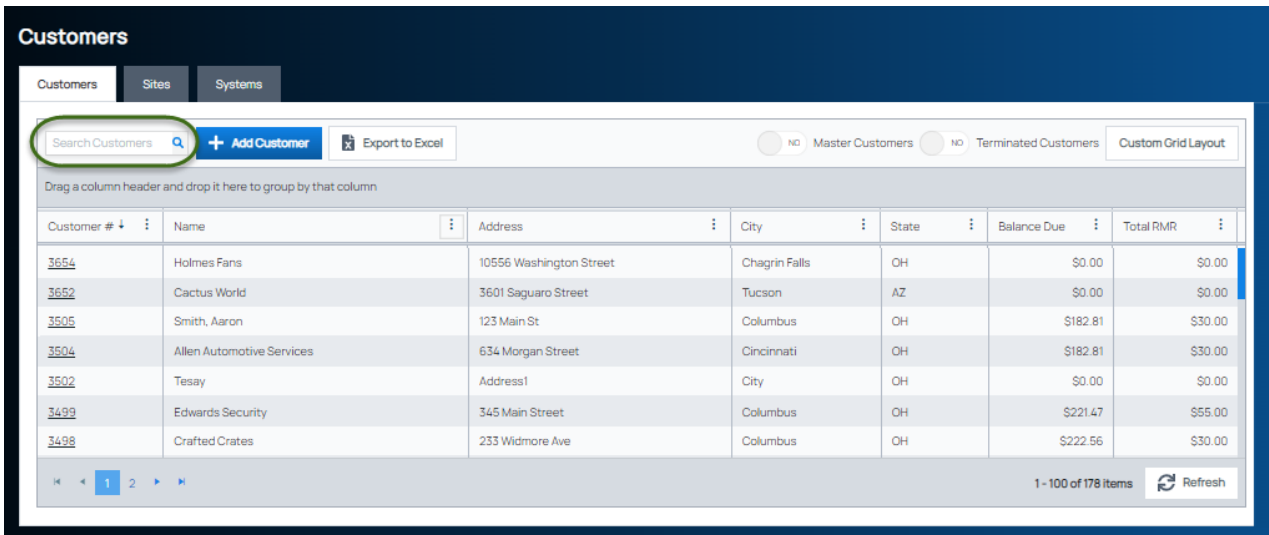
# Edit Site Notes

Last Modified on 12/12/2024 1:43 pm EST

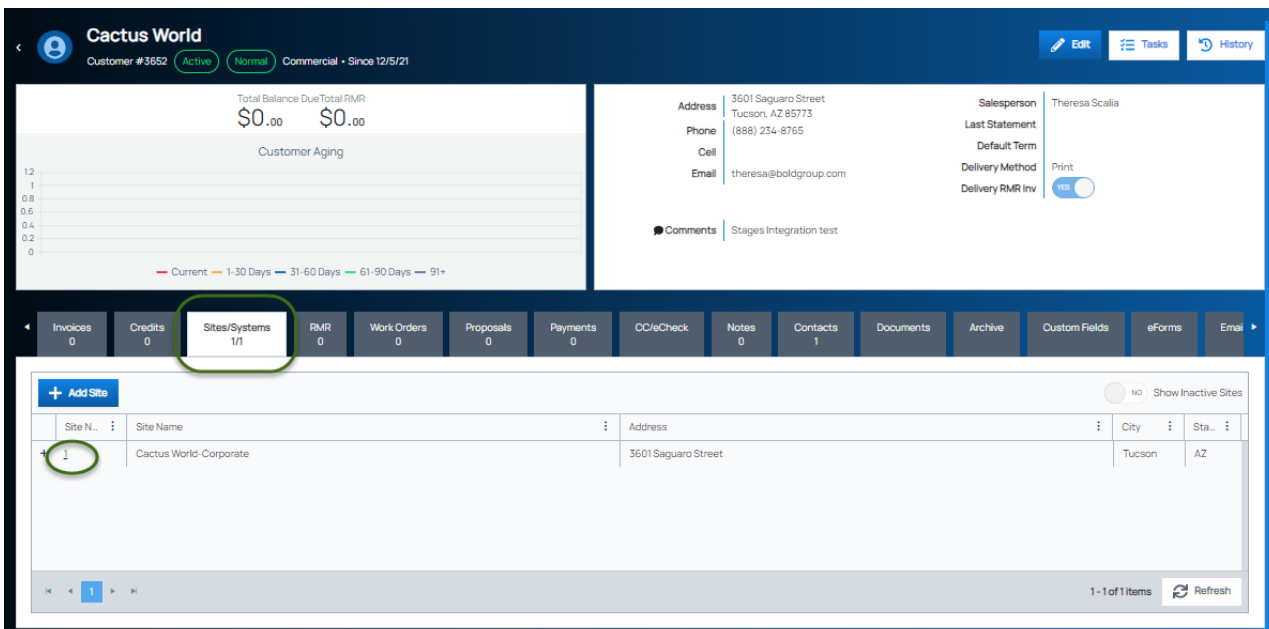
To edit a Site Note, you must first access the customer record.

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 for which you want to edit a note.



The Site record opens. Click on the Notes tab. Locate the Note you want to edit, and then click on the Edit button (pencil icon).

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 | Custom Fields | Item Defaults | eForms | Part Ledger | External

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

1 - 2 of 2 items Refresh

The Note Edit form opens. Make the necessary changes, and then click the Save button when finished.

### Note Edit

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

Type • Standard

Expiration Date Expiration Date

Save Cancel