## **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.

ustomers Site	es Systems							
Search Customers	Q + Add Customer	X Export to Excel			NO Master Cus	tomers NO Te	erminated Customers	Custom Grid Layout
Drag a column header	r and drop it here to group by the	it column						
Customer # 🕴 :	Name		: Address	:	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	ОН	\$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 for which you want to edit a note.

Cactus World Customer #3652 Active Normal Commercial - Since 12/5/21	✓ Edit 把 Tasks う History
Total Balance Dua Total RMR \$0.00 \$0.00 Customer Aging	Address     3601 Saguaro Street     Salesperson     Theresa Scalia       Phone     (88) 234-8765     Last Statement       Cell     Default Term       Email     theresa@boldgroup.com       Delivery RMR Inv     Theresa
- Current         - 1-30 Days         - 51-90 Days         - 91+           Invoices         Credits         Sites/Systems         RMR         Work Orders         Proposals         Payment           0         0         1/1         0         0         0         0	8 CC/eCheck Notes Contacts Documents Archive Custom Fields eForms Emal ▶ 0 1
+ Add Site Site N : Site Name	Address     i Address     i City i Sta_i
Cactus World-Corporate	3601 Saguaro Street Tucson AZ
н + 1 > н	1-1of1items 🖉 Refresh

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).

Active O Emily Wood - 3703 46722 Chandler, Phoenix, AZ 85003 - emilyLwood@gmail.com	\$2.00			Warranty S Warranty Le Warranty I Service Li	abor 1 Year Parts & L Part 1 Year Parts & L		T Tax Sit	esince o3/07/20 veDate -		
otes 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		÷ N	lodified	:	Modified By	Туре	Expiration	:		
Do Not Park in the customer's driveway! This is the Site note for the Phoenix location.			Mar 20, 2022, 8:40 Mar 20, 2022, 5:10:		Papay, Travis Papay, Travis	Critical (Standard)			Edit	Delete
									v	_
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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
Туре •	Standard	
Expiration Date	Expiration Date	Ē
	Save Cancel	
	Save Cancel	