

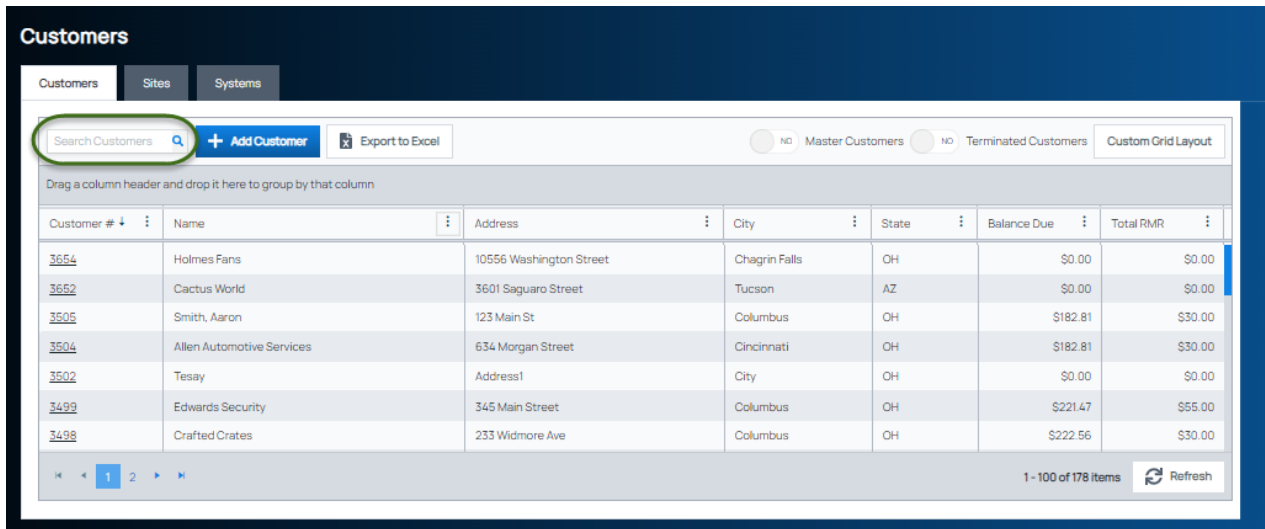
Edit Site Notes

Last Modified on 05/01/2022 6:24 am EDT

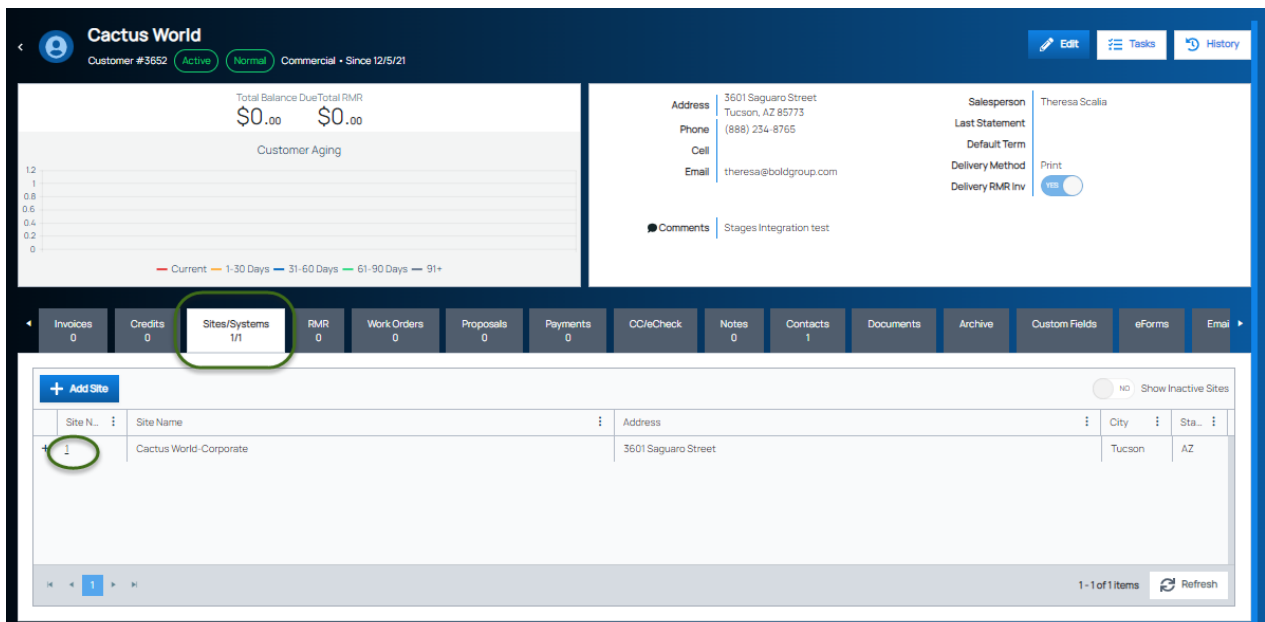
To edit a Site Note, you must first access the customer record.

From the main menu, arrive at the Customers list with this path: Accounts Receivable> Customers.

The Customers list will be displayed. Locate the customer in the list, and then click on the hyperlink in the Customer # column to open the customer record.



The Customer record will be displayed. 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 will be displayed. 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 will be displayed. 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