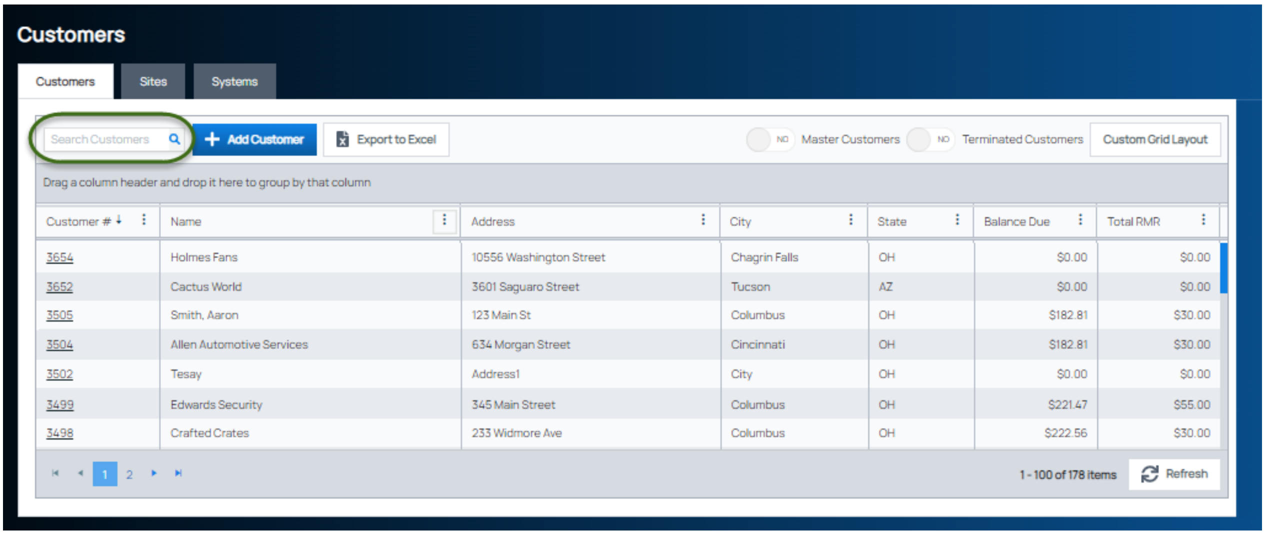
Add System Notes

Last Modified on 05/01/2022 6:19 am EDT

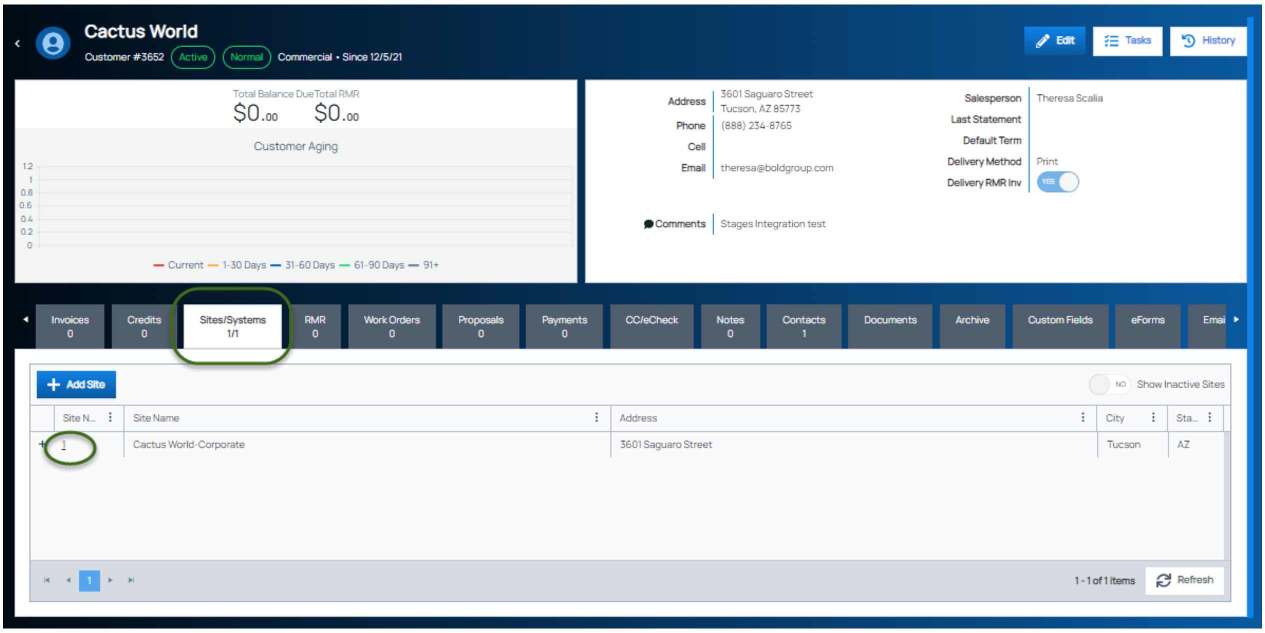
To add a System Note, you must first access the customer record.

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

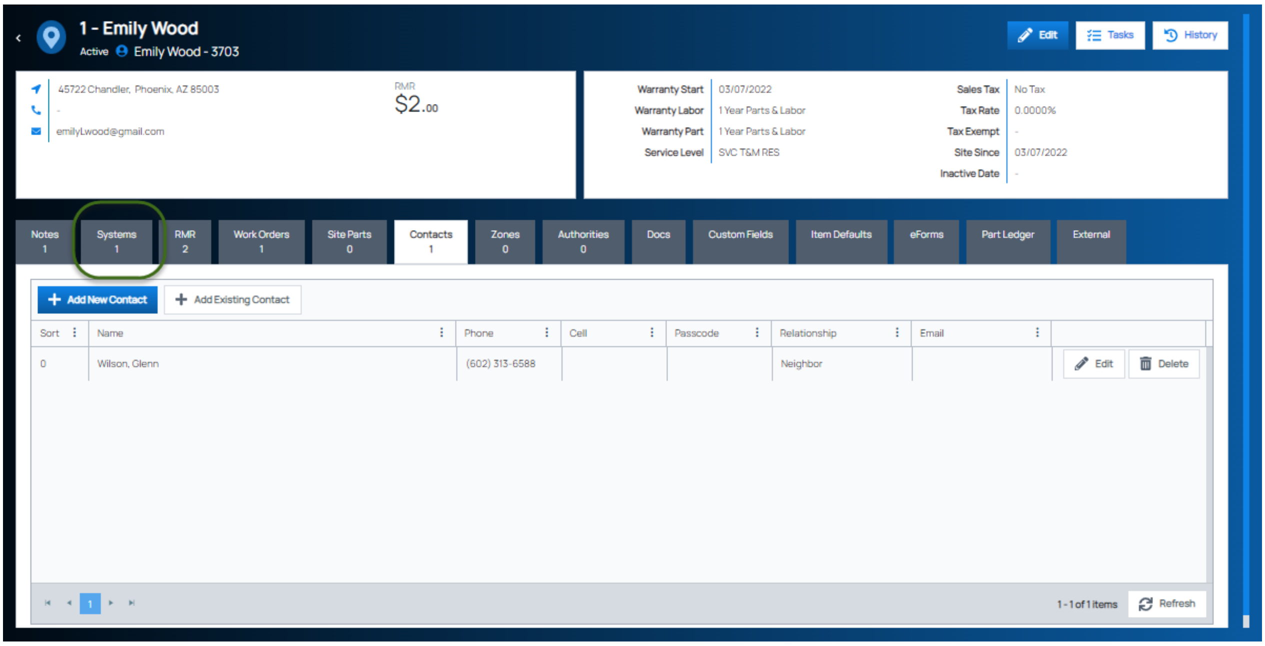
The Customers list will be displayed. Locate the customer in the list, and then click on the hyperlink in the Customer # column to open the customer record.



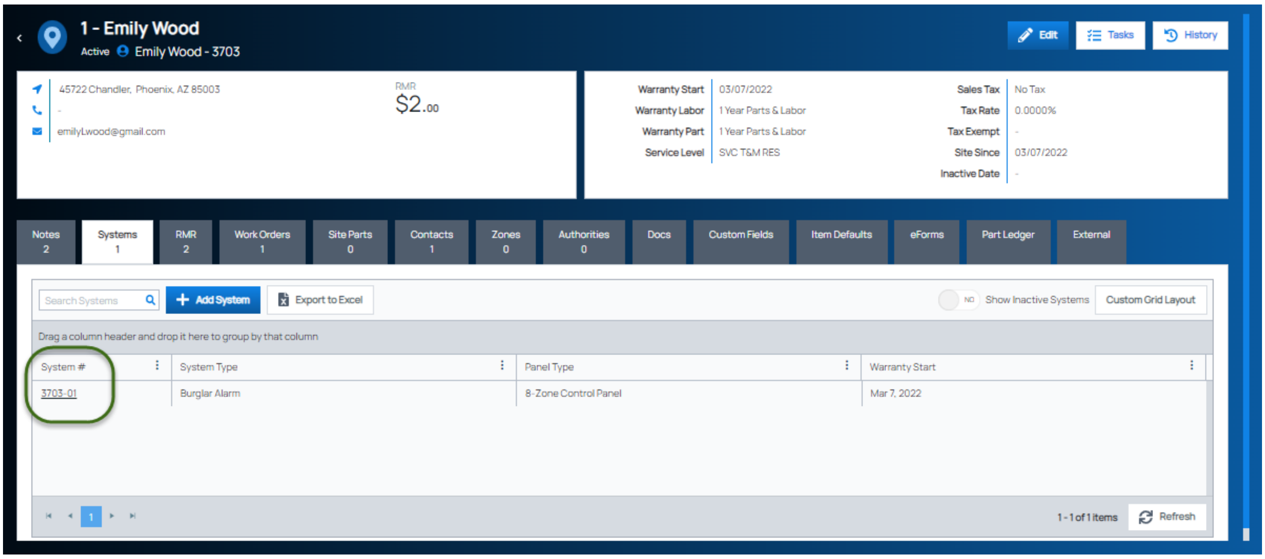
The Customer record will be displayed. Click on the Sites/Systems tab, and then in the Site Number column, click on the hyperlink of the Site to which the System is linked to add a note.



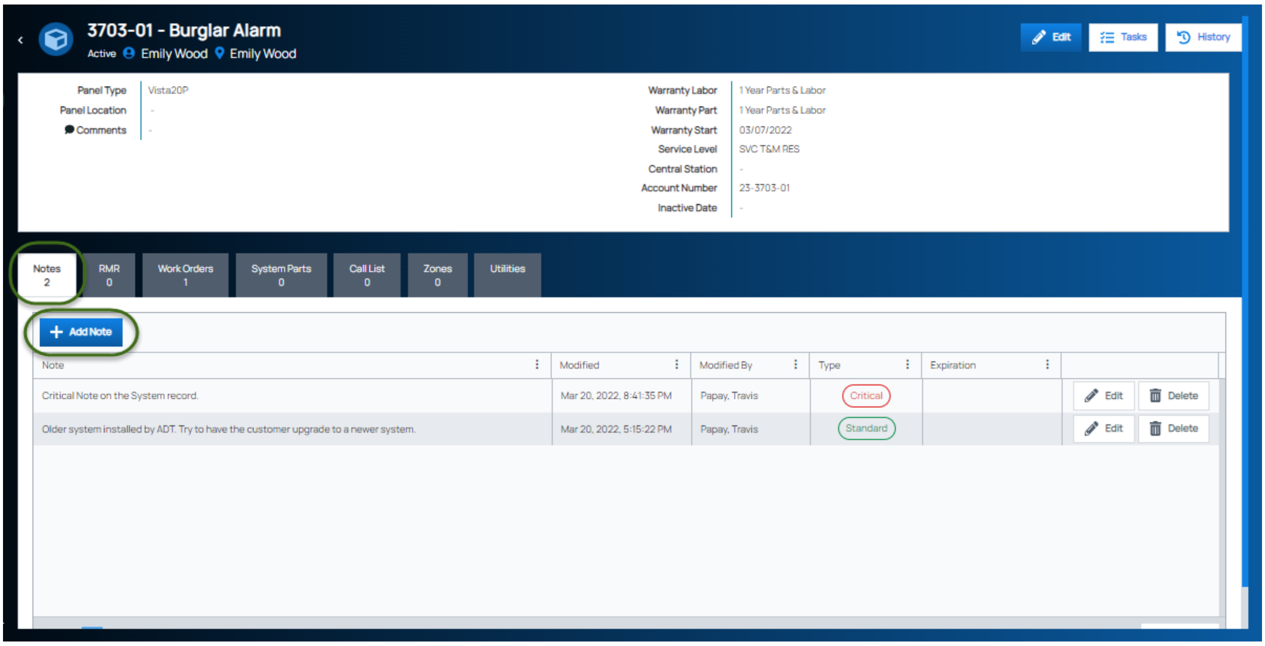
The Site record will be displayed. Click on the Systems tab.



A list of Systems attached to the Site will be listed in the grid area. In the System Number column, click on the hyperlink of the System for which you want to enter a Note.



The System record will be displayed. Click on the Notes tab, and then click on the Add Note button.

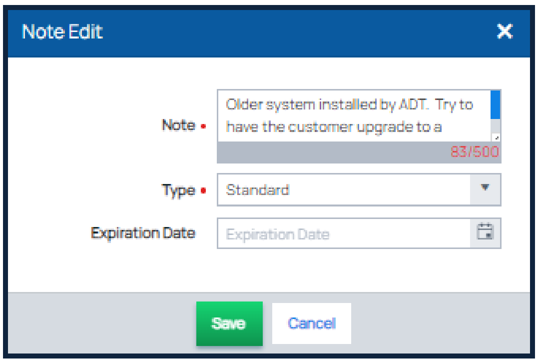


The Note Edit form will be displayed. Each data entry field will be described below.

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 may 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 on the page.
    - 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.