Add System Notes

Last Modified on 12/16/2024 4:51 pm EST

To add a System 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 the hyperlink in the Customer # column to open the customer record.

Customers								
Customers Site	s Systems							
Search Customers	Add Customer	Export to Excel			Master Cu	tomers NO Te	erminated Customers	Custom Grid Layout
Drag a column header a	and drop it here to group by that	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	ОН	\$182.81	\$30.00
3504	Allen Automotive Services		634 Morgan Street		Cincinnati	ОН	\$182.81	\$30.00
3502	Tesay		Address1		City	ОН	\$0.00	\$0.00
<u>3499</u>	Edwards Security		345 Main Street		Columbus	OH	\$221.47	\$55.00
<u>3498</u>	Crafted Crates		233 Widmore Ave		Columbus	ОН	\$222.56	\$30.00
₩ 4 1 2 →	H < 1 2 → H 1-100 of 178 items C Refresh							

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

Cactus World Oustomer #3852 Active Normal Commercial - Since 12/5/21	✓ Edit # Tasks * History
Total Balance DueTotal RMR \$0.00 \$0.00	Address 3601 Saguaro Street Salesperson Theresa Scalia Tucson, AZ 85773 Last Statement
Customer Aging	Cell Default Term Cell Delivery Method Email theresa@boldgroup.com Delivery RMR Inv Delivery RMR Inv Total
Current — 1-30 Days — 31-60 Days — 61-90 Days — 91+	
Invoices Crodits Sites/Systems RMR Work-Orders Proposals Paymer 0 0 0 0	nts CC/eCheck Notes Contacts Documents Archive Oustom Fields eForms Email > 0 1
+ Add Site	NO Show Inactive Sites
Site N : Site Name	i Address i City i Sta i
1 Cactus World-Corporate	3601 Saguaro Street Tucson AZ
\smile	
н к 1 ж н	1-1of litems & Refresh

The Site record opens. Click the Systems tab.

< O 1 - Emily Wood Active Emily Wood - 3703				Edit 🔚 Tasks 🖏 History
 45722 Chandler, Phoenix, AZ 85003 	™ \$2.00	Warranty Start 03/07/2022 Warranty Labor 1 Year Parts & Labor Warranty Part 1 Year Parts & Labor Service Level 5V/C T5M RES	Sales Tax No Tax Rate 0.0 Tax Exempt - Site Since 03/ Inactive Date -	Tax 000% 107/2022
Notes Systems RMR Work Orders 1 2 1	Site Parts Contacts Zones Aut 0 1 0	horities Docs Custom Fields I 0	Item Defaults eForms Part Ledge	er External
+ Add New Contact + Add Existing Contact				
Sort : Name	i Phone i C	Cell I Passcode I Relation	onship : Email	:
0 Wilson, Glenn	(602) 313-6588	Neighb	bor	Sedit 🔟 Delete
н 4 <mark>1</mark> н н				1-1of1items 2 Refresh

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

< O 1 - Emily Wood Active Emily Wood - 3703			🖋 Edit 🛛 🖽 Tasks 🕥 History		
 45722 Chandler, Phoenix, AZ 85003 - emilyLwood@gmail.com 	ыля \$2.00	Warranty Start 03/07/2022 Warranty Labor 1Year Parts & Labor Warranty Part 1Year Parts & Labor Service Level SVC T&M RES	Sales Tax No Tax Tax Rato 0.0000% Tax Exempt - Site Since 0.3/07/2022 Inactive Date -		
Notes Systems RMR Work-Orders Site 2 1 2 1	e Parts Contacts Zones Au 0 1 0	thorities Docs Custom Fields Item Defau 0	Its eForms PartLadger External		
Search Systems Q + Add System Decel Custom Orid Layout					
System # : System Type	E Panel Type		Warranty Start :		
3703-01 Burglar Alarm 8-Zone Control Panel Mar 7, 2022					
H 4 1 - H			1-1of1items CRefresh		

The System record opens. Click the Notes tab, and then click the Add Note button.

< i 3703-01 - Burglar Alarm Active					🏈 Edit	ž⊒ Tasks	3 History
Panel Type Vista20P	Warranty Labo	r 1 Year Parts & La	bor				
Panel Location -	Warranty Par	t 1 Year Parts & La	bor				
Comments -	Warranty Star	t 03/07/2022					
	Central Statio	n -					
	Account Numbe	r 23-3703-01					
	Inactive Date	e -					
Notes RMR Work Orders System Parts Call List Zones Utilities 2 1 0 0 0 Utilities							
Note	Modified : Mo	dified By	Туре :	Expiration	:		
Critical Note on the System record.	Mar 20, 2022, 8:41:35 PM Pa	pay, Travis	Critical		đ	🖍 Edit	Delete
Older system installed by ADT. Try to have the customer upgrade to a newer system.	Mar 20, 2022, 5:15:22 PM Pa	pay, Travis	Standard		ć	🖋 Edit 🦷	Delete

The Note Edit form 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 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.

Note Edit	×
Note •	Older system installed by ADT. Try to have the customer upgrade to a , 83/500
Type • Expiration Date	Standard Expiration Date
	Save Cancel

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