

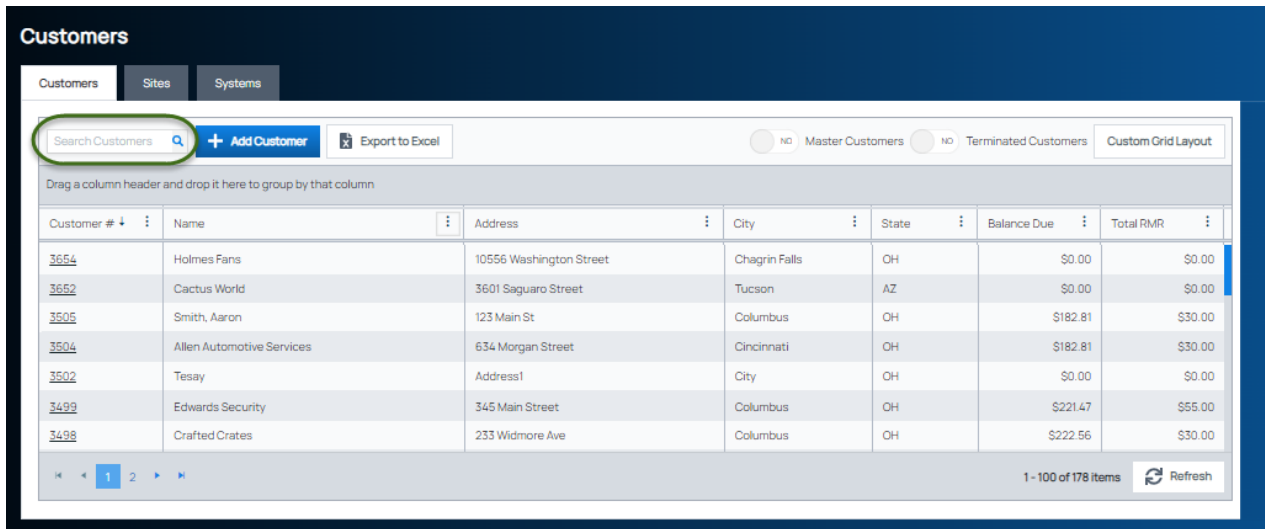
# Add System Notes

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

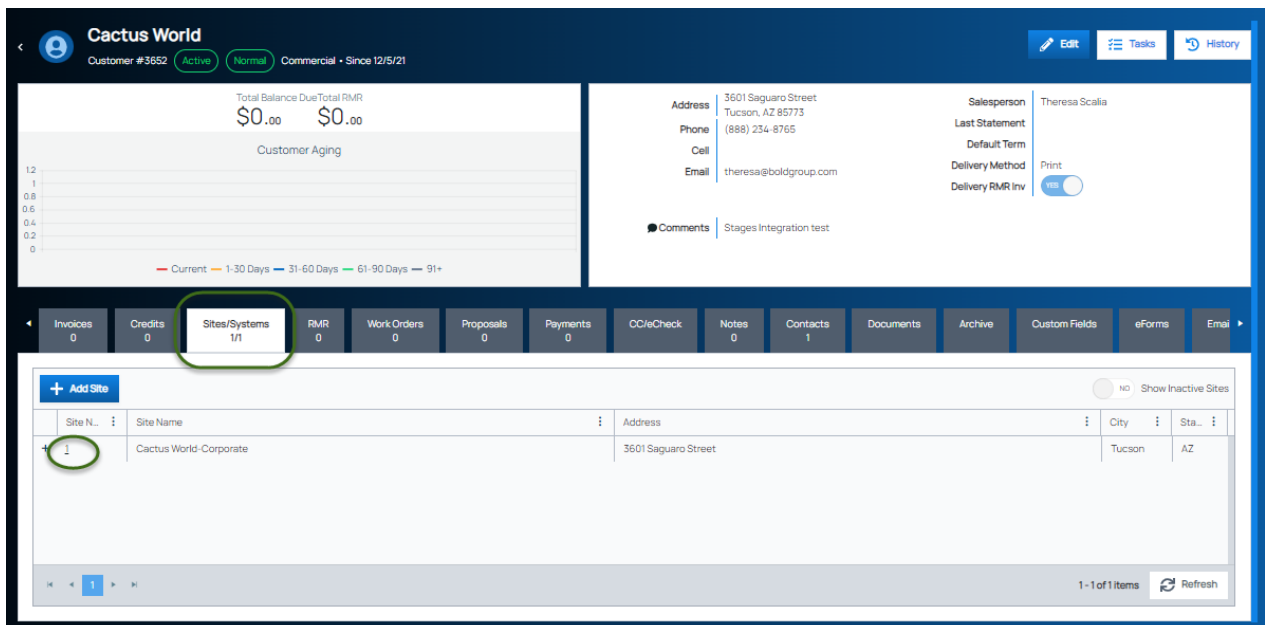
To add a System Note, you must first access the customer record.

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.

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 1 | **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

+ Add New Contact + Add Existing Contact

Sort	Name	Phone	Cell	Passcode	Relationship	Email	
0	Wilson, Glenn	(602) 313-6588			Neighbor		Edit Delete

1 - 1 of 1 Items Refresh

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.

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Tax Exempt: -  
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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

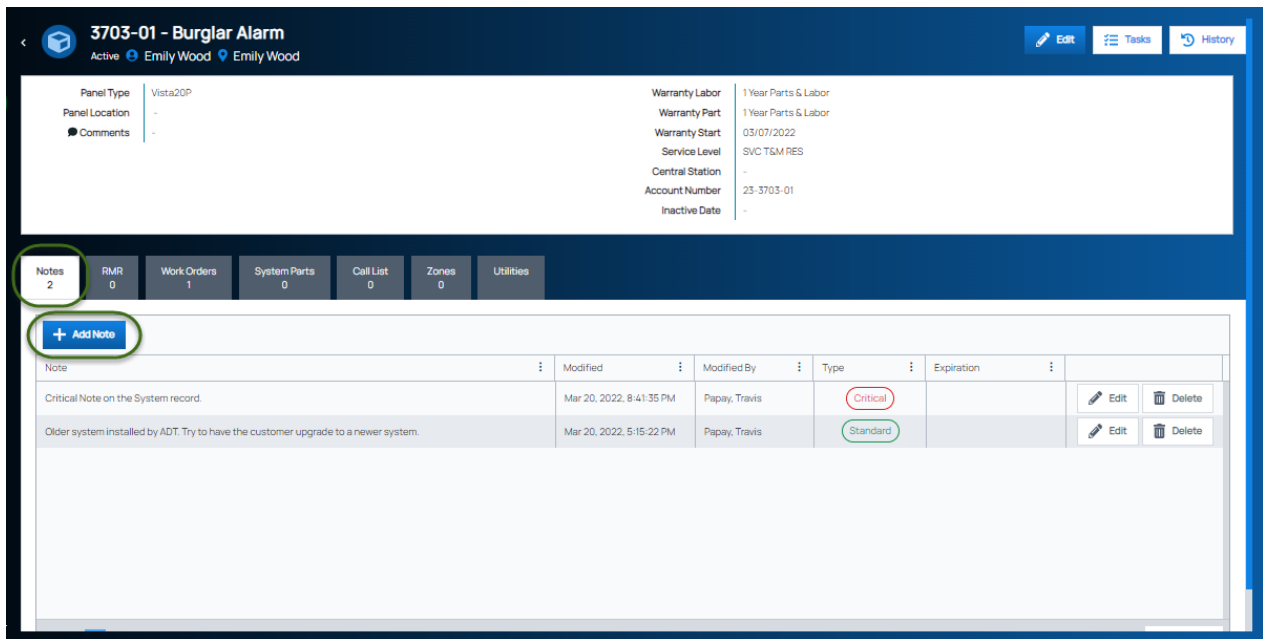
Search Systems + Add System Export to Excel  Show Inactive Systems Custom Grid Layout

Drag a column header and drop it here to group by that column

System #	System Type	Panel Type	Warranty Start
<a href="#">3703-01</a>	Burglar Alarm	8-Zone Control Panel	Mar 7, 2022

1 - 1 of 1 Items Refresh

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.