

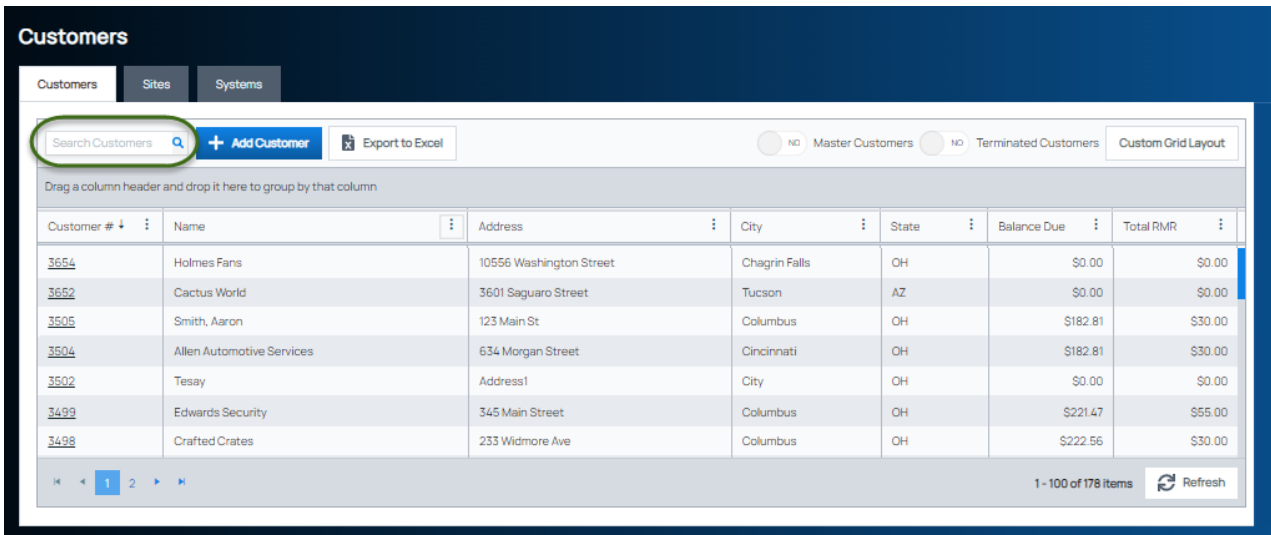
# Add System Notes

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

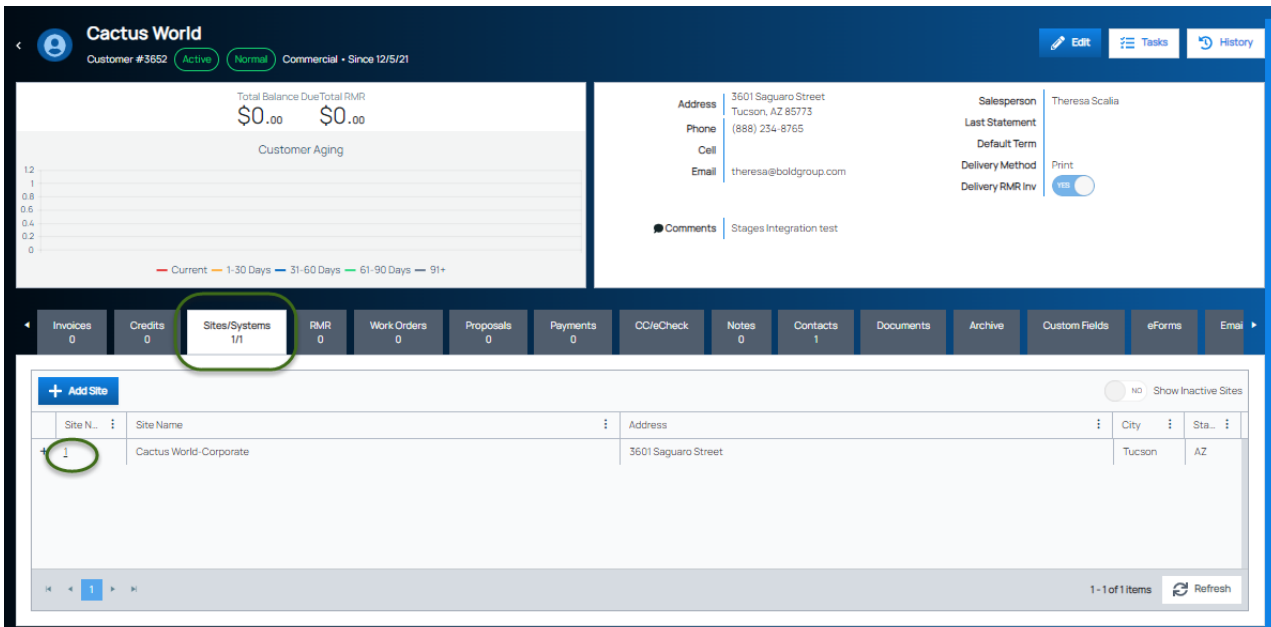
To add a System Note, you must first access the customer record.

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.



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.



The Site record opens. Click 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: 0 | Custom Fields: 0 | Item Defaults: 0 | eForms: 0 | Part Ledger: 0 | External: 0

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 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.

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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: 0 | Custom Fields: 0 | Item Defaults: 0 | eForms: 0 | Part Ledger: 0 | External: 0

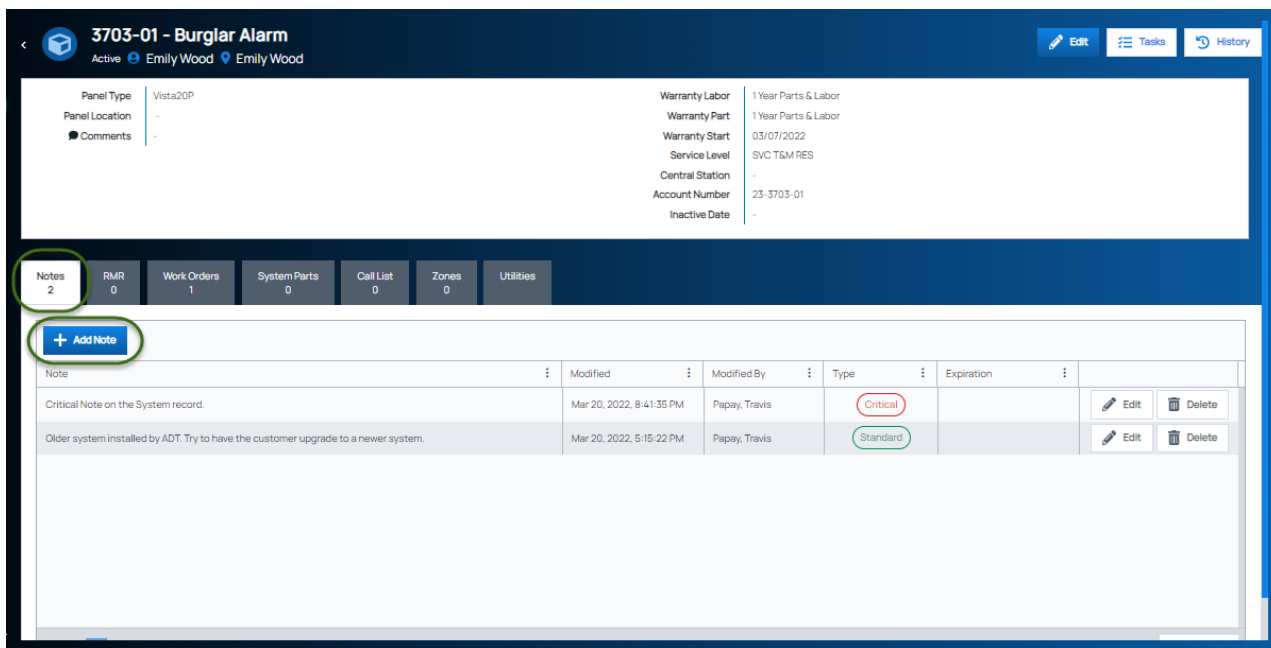
Search Systems + Add System Export to Excel Show Inactive Systems Custom Grid Layout

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



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.

The 'Note Edit' form is shown in a window. It has a title bar with 'Note Edit' and a close button. The form contains three main fields: 'Note' (a text area with a character count of 83/500), 'Type' (a dropdown menu currently set to 'Standard'), and 'Expiration Date' (a date picker field). At the bottom of the form are two buttons: 'Save' (in a green box) and 'Cancel' (in a white box with a blue border).

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