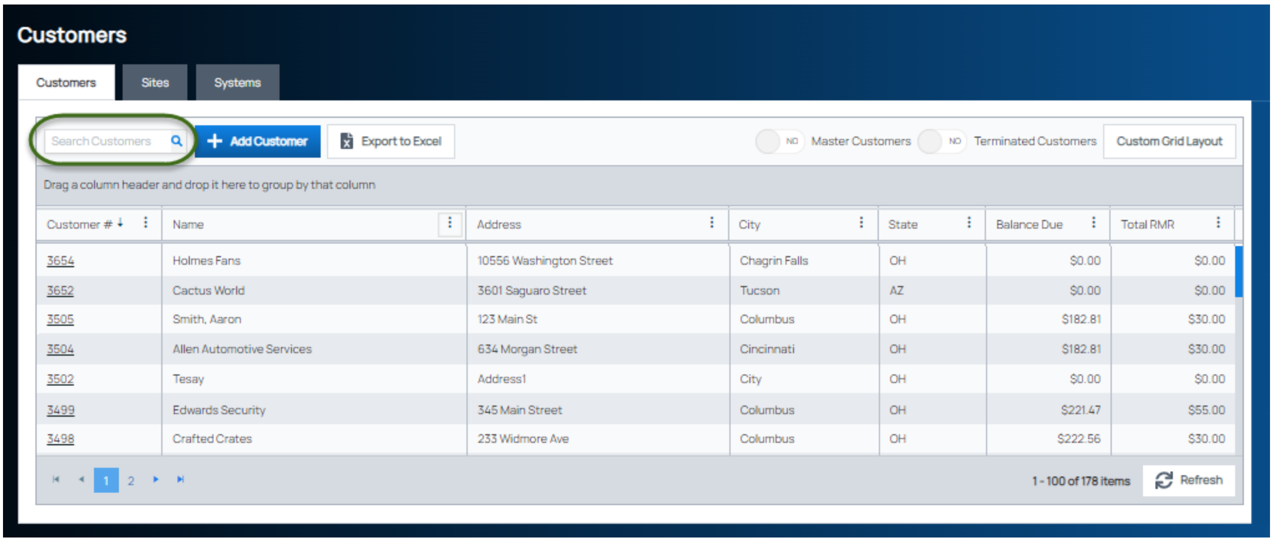
Edit System Notes

Last Modified on 12/16/2024 4:56 pm EST

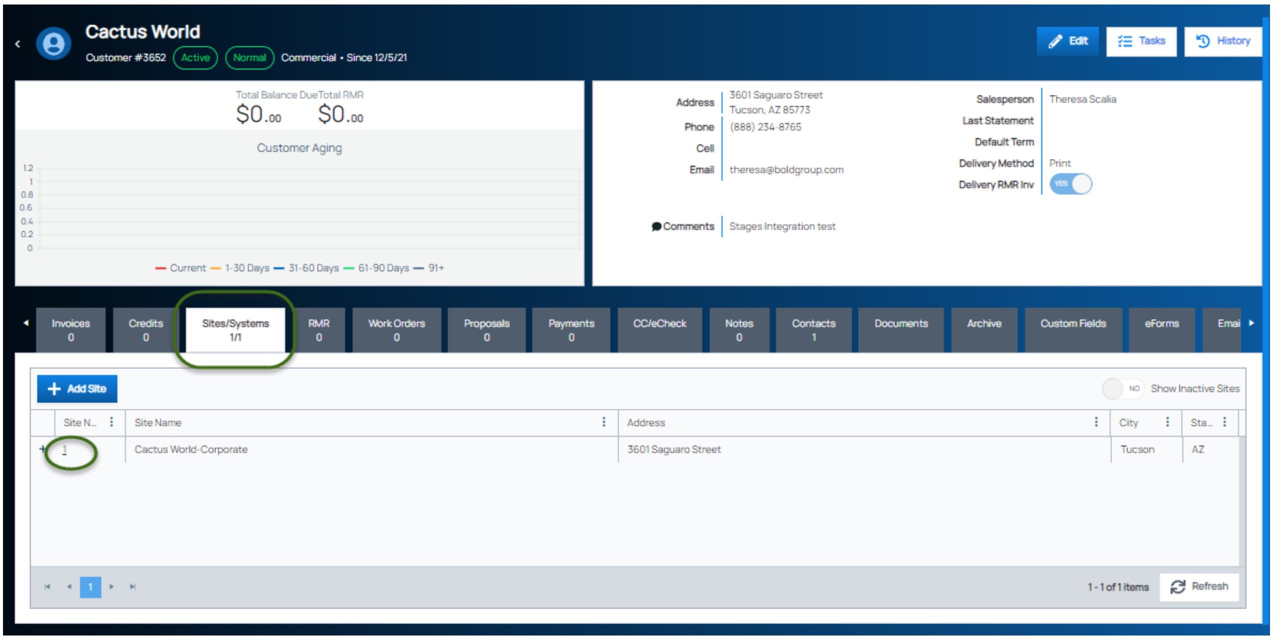
To edit a System Note, you must first access the customer record.

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

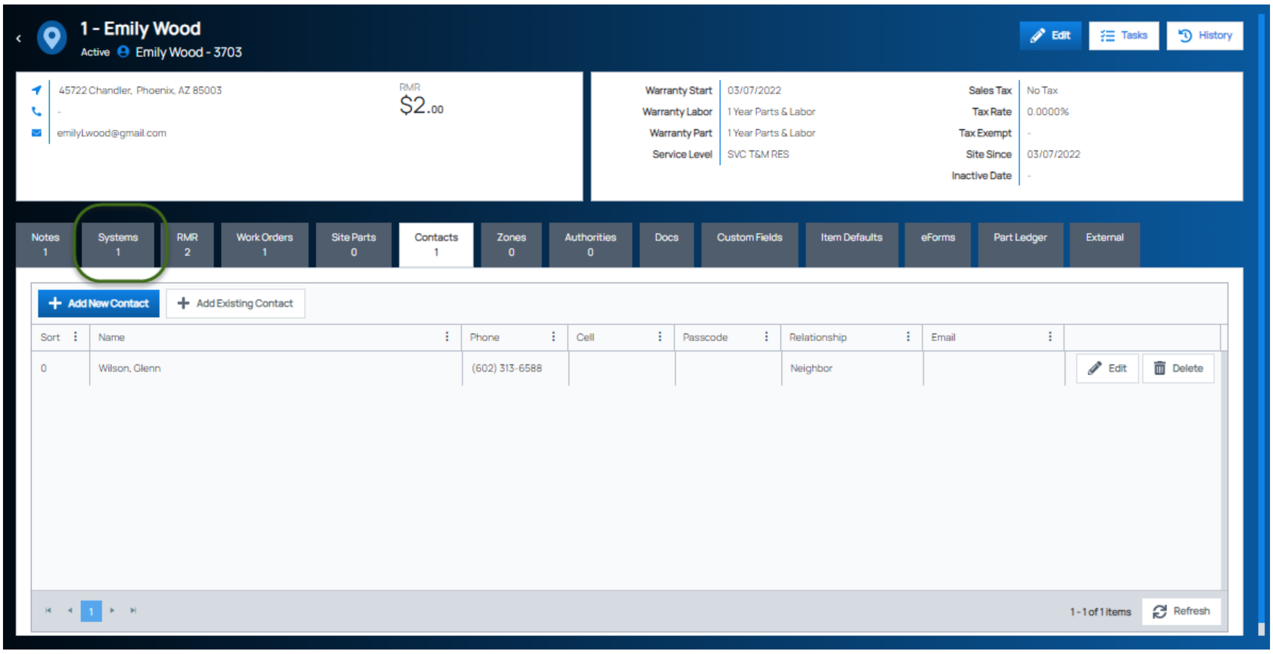
The Customers list opens. Locate the customer in the list, and then click the hyperlink in the Customer # column to open the customer record.



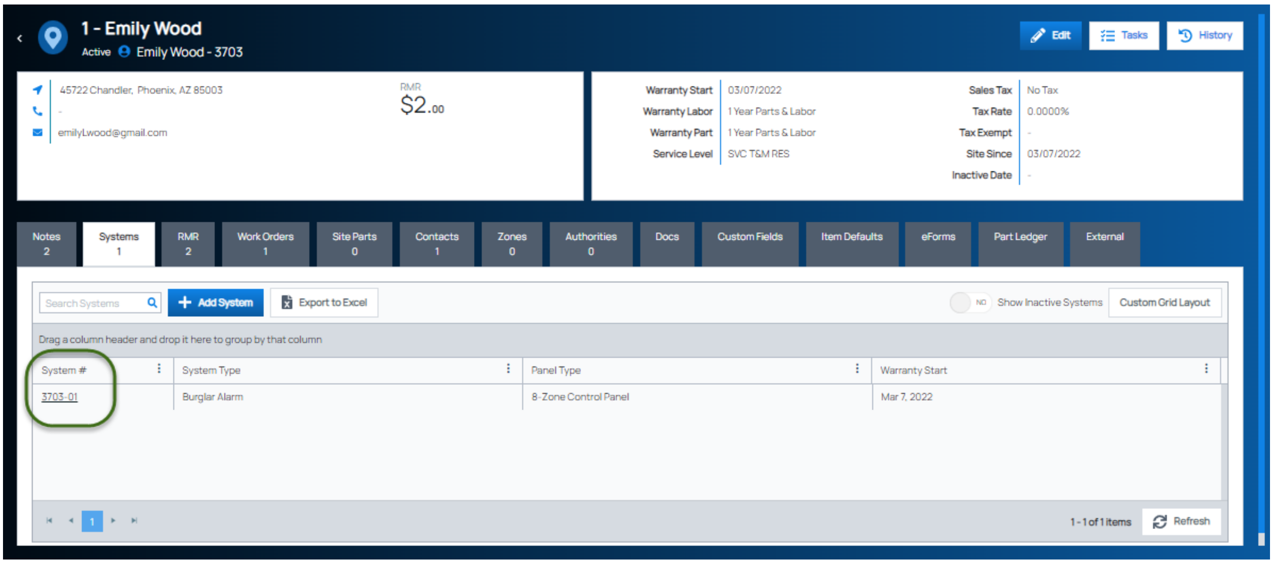
The Customer record opens. Click the Sites/Systems tab, and then in the Site Number column, click the hyperlink of the Site to which the System is linked to edit a note.



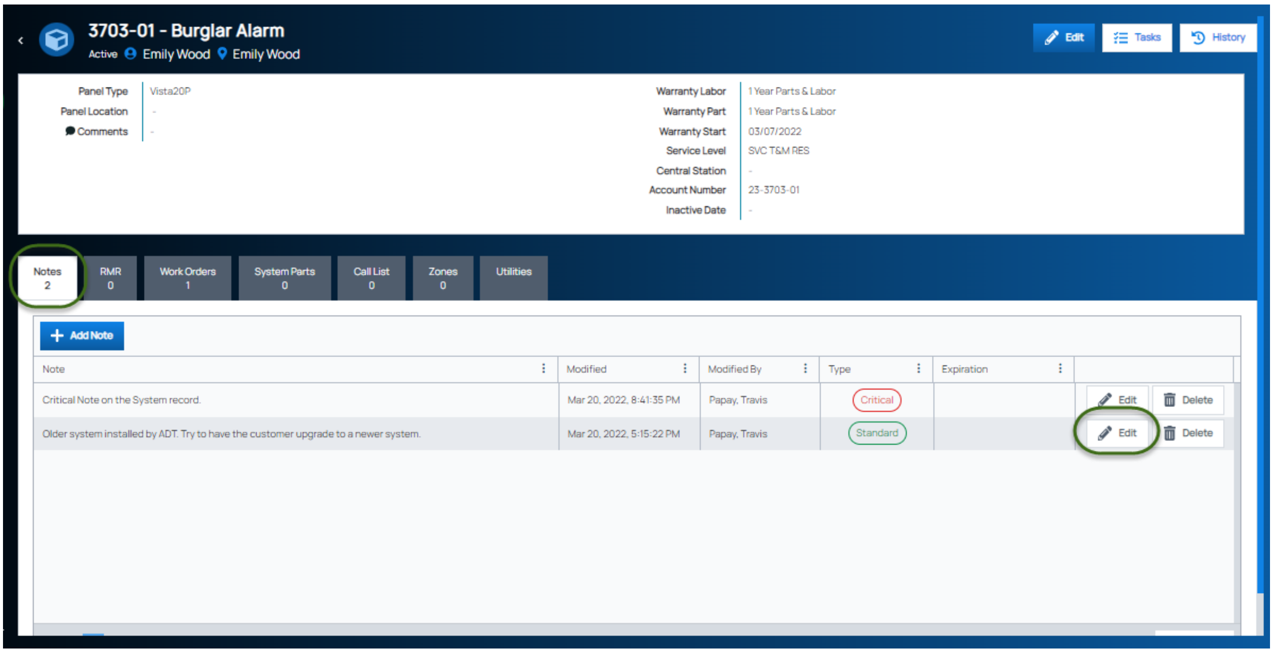
The Site record opens. Click the Systems tab.



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 edit a Note.



The System record opens. Locate the Note you want to edit, and then click the Edit button (pencil icon).



The Note Edit form opens. Make the necessary changes, and then click the Save button when finished.