

Account Notes

Last Modified on 02/10/2026 11:23 am PST

Pathway: [Accounts](#) > [Search - Account](#)

Account level notes allow users to apply notes that are accessible across all sites associated with the account. These notes serve as a centralized repository of information relevant to the entire account, ensuring seamless communication and coordination across multiple sites.

49232

Caribou Coffee

112 Chieftain St
Osceola, WI 54020
US

100

2

3

100

Active

DIVISION
ACCOUNT MGR

CLASS
BILL GROUP

QAWASTE
House Account - House Account (Sales)
COMMERCIAL
QA_Doc_4 Week Anniversary

TERMS
INVOICE DELIVERY

COD
Printed

CURRENT
-30.00

1-30
30.00

31-60
0.00

61-90
0.00

91-120
0.00

120+
0.00

TOTAL
0.00

49232001

Caribou Cafe

112 Chieftain St
Osceola, WI 54020
US

1 of 2

100

2

3

100

ACCESS
NOTE

Always use East gate
Collection Times: Before 8 AM to avoid business hours.

BUSINESS HOURS / SERVICE WINDOW
Weekdays 8:00 AM to 7:00 PM

Auto Pay Not Enabled

HIGHLIGHTS

PENDING

9346

Credit Request

Paul Gonzalez - QA ...

12/31/2024

Testing adding

WARNING

Account:
Verify payment status before scheduling additional service.

OK

ACTIVE SERVICES (1)

Standard

TOTAL RECURRING \$ 103.92

QTY

SERVICE CODE

SERVICE ID

LAST ACTIVITY

FREQUENCY

SCHEDULE

PER UNIT RATE

RATE

WO MIN.

1

4 Yard Trash Service

38579

1x per week

H

\$ 103.92

\$ 103.92 per month

CALENDAR

February, 2025

EVENTS

Appointment, AR, Cancellation, Complaint, Er

SUN

MON

TUE

WED

THU

Jan 26

Jan 27

Jan 28

Jan 29

Jan 30

(1 views) - Aliena Somers

(1) 1, FL_SERVICE, 4YD, MSW

Permissions

Review the following permissions that are necessary for note creation and management:

Permission ID	Permission Name
14	Add Note
15	Edit Note For Self
16	Delete Note For Self
17	Edit Note For Others
18	Delete Note For Others
19	Set Note Date And Time When Adding Note
20	Edit Note Date And Time For Self
21	Edit Date Note and Time For Others

Warning on Open

Displays as a pop-up warning anytime the account is accessed. Warnings entered here will display when any of the

site locations linked to the account are accessed.

The screenshot displays the 'EDIT ACCOUNT' interface. On the left, the 'Account' tab is active, showing fields for Billing (BILL GROUP, INVOICE BY EMAIL, INVOICE DETAIL LEVEL, TERM, CREDIT LIMIT) and AP (DEFAULT PAYMENT METHOD, INSTRUCTIONS, WARNING ON OPEN). The 'Settings' tab is also visible. On the right, a summary section includes 'BILL BY SITE' and 'AUTO STATUS UPDATE' checkboxes, a table of terms (Net 20, 1-30, 31-60, 61-90, 91-120, 120+), and a table of active services (10 Yard Open Top Service, 30 YD Open Top Minimum Charge). Below this is a calendar for February 2024. A 'WARNING' pop-up is displayed over the calendar, stating 'Account: No check payments.' with an 'OK' button.

TERMS	Net 20	1-30	31-60	61-90	91-120	120+	TOTAL
CURRENT	0.00	0.00	0.00	0.00	483.69	0.00	483.69

QTY	SERVICE CODE	SERVICE ID	FREQUENCY	SCHEDULE
1	10 Yard Open Top Service	E255	On Call	
3	30 YD Open Top Minimum Charge	BBA1	On Call	

Add a 'Warning On Open' Note

1. Navigate to the account using your preferred search method.
2. Right-click under the account's address (left side of the Customer Service screen) and select **Edit** to open the 'Edit Account' editor.
3. Enter a warning note into the **Warning On Open** text box field.
4. Select **Save** when finished.

To **remove** a warning note that no longer applies, follow steps 1-3 outlined above and delete the text from the *Warning On Open* field. Select **Save** when done.

One Time Note

Enter a one-time note at the **account level** and the note will display on the selected day in the calendar for each site.

The screenshot illustrates the steps to add a one-time note in the NavuNav system. It shows the account summary, active services, and a calendar interface. A right-click on a date in the calendar opens a context menu where 'Add Note' is selected. This triggers an 'ADD NOTE' dialog box where the user can specify the creation date, note type, and the note's content. The final step shows the note appearing as a 'Service Note' on the calendar.

Add a One-time Note

1. Navigate to the account using your preferred search method.
2. Right-click on the date in the calendar the note applies and select **Add Note**. The 'Edit Note' pop-up will display to add a note.
3. Verify the date in the **Created On** field is the date you intend for the note to display on. Use the calendar icon to edit the date if needed.
4. Select the **Note Type**. Account-level notes must use a designated 'Account' Note Type.
 - Note Types are established and are available to reference in *Setup > Customer > Note Type*.
 - Note Types are created for either account-level (displays across all sites), or site-level (displays for a specific site) use.
5. Enter the body of the note in the **Note** field.
6. Select **Save** when finished. The note will display on the calendar for the date indicated in the Created On field.

To remove a note:

1. Select the note from the calendar.
2. Select **Delete** and the note will be deleted from the account and all sites.

Service Notes

Add a service note to an active service, and it will display on work orders and in the NavuNav driver application based on the dates entered.

48991 The Pour 12345 ABCDEFGHIJ Puerto Rico, AB 12344

48991001 The Pour 12345 ABCDEFGHIJ Puerto Rico, AB 12344

DIVISION HOUSTON
ACCOUNT MGR Aliena Somers
CLASS ROLL OFF-PERM
BILL GROUP Invoice Test Only
Arrears - Monthly Billed Thru Date None

DIVISION HOUSTON
SERVICE REGION HOUSTON OPEN MARKET
SALES REP Aliena Somers
SOURCE Call In

CURRENT	1-30	31-60	61-90	91-120	120+	TOTAL
0.00	0.00	0.00	0.00	0.00	0.00	0.00

HIGHLIGHTS PENDING

Site is not geocoded

ACTIVE SERVICES (1) Standard TOTAL RECURRING \$ 0.00

QTY	SERVICE CODE	SERVICE ID	FREQUENCY	SCHEDULE	RATE	START DATE	END DATE	CONTRACT EXP.	WO MIN.
1	10 Yard Open Top Service	1372	On Call		\$ 0.00 per month	11/06/23			

CALENDAR November, 2023

SUN Oct 29 MON Oct 30 TUE WED THU FRI SAT Nov 4

Nov 5 Nov 6 Nov 11

1, RO_DELIVER, 10YDF
\$1 10 Yard Open Top Ser
(1) Aliena Somers

SERVICE ADDITIONAL FIELDS

REASON CODE ADD-New Business

PO NUMBER

BLANKET PO

DESTINATION/ORIGIN

SERVICE NOTES

START DATE	END DATE	NOTE
11/08/2023	11/09/2023	Call when you arrive. (555) 555-5555

SAVE CANCEL

Add a Service Note:

1. From the Active Services section of an account, select the **green dot icon** associated to the active service to open the "Service Additional Fields" editor.
2. Select the plus icon from the **Service Notes** section of the editor. By default, the current date will populate the **Start Date** field.
3. Enter an **End Date** if the note should be restricted to a specific time period. Otherwise, leave the End Date field blank and the service note will continuously display on work orders and in the NavuNav driver application.
4. Enter the **Note** that you would like displayed.
5. Select **Save** when finished.

Delete/End a Service Note:

✓ If a historical record of a service note must be kept, consider adding an end date instead of deleting the note. This will ensure the visibility of the service note on the relevant work orders within the designated start and end date time frame, while preventing it from being added to any future work orders.

1. From the Active Service section of an account, select the **green dot icon** for the active service you would like to end/remove the note from. This will open the "Service Additional Fields" editor.
2. Select the "Delete Site Service Note" icon that is displayed to the right of the note. This will trigger a Confirmation popup.
3. Select "Yes" to confirm the cancel and the service note will be removed from the active service and all work orders it was previously applied to.

Related Articles:

[Note Type Setup](#)

[Overview of Note Types](#)

[Site Level Notes](#)
