# Overview of Note Types

**Pathway:** *Customer > Search - Accounts*

The Customer Service screen provides access to a variety of ways notes can be added to accounts/sites, services and work orders. This article provides an overview on the different note types with links to how to create them.

## Permissions

The following permissions are linked to the creation and editing of notes:

| 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 |
| 272 | Edit/Delete Note Task |

## Overview of Note Types

| Note Type | Description | Visible On... |
|---|---|---|
| **Account Level Notes** *Notes and warnings added at the **account level** will display for all sites linked to the account.* | | |
| **Related Article Link:** Account Level Notes | | |
| **Warning on Open** | Displays as a pop-up warning anytime the account is accessed. Warnings entered here will display for all service locations linked to the account. *Example: "Only Denise or Bill are authorized account contacts"* | NavuCore |
| **One Time Note** | Enter a one-time note at the account level and the note will display on the designated calendar day for each site. *Example: "Fax all site invoices for May to Bill (555)555-1234"* | NavuCore |
| | | |
| **Site Level Notes** *Notes and warnings added at the **site level** will only display for the site the note was added.* | | |
| **Related Article Link:** Site Level Notes | | |

| Note Type | Description | Visible On... |
|---|---|---|
| **Warning on Open** | Displays as a site-specific pop-up warning anytime the site is accessed.<br>*Example: "Only John D. can cancel a service"* | NavuCore |
| **Access Information** | Used for conveying information the driver will need to access a location.<br>*Example(s): "Use door in back" or "Gate Code: (555589)"* | NavuNav (Drivers)<br>NavuCore |
| **One Time Note (Site)** | Enter a one-time note at the site level and the note will only display on the designated calendar day for the site it was entered.<br>*Example: "Billing inquiry to add an additional container"* | NavuCore |
| **Service Notes** | Notes that are specific to a service. These can be displayed as a one-time note using start and end dates, or a continual note by omitting the end date.<br>*Example: "Always leave container on the right side of the property"* | NavuNav (Drivers)<br>NavuCore |
| **Work Order Notes** | Add a note to a work order for the driver to see.<br>*Example: "Drop-off one extra container"* | NavuNav (Drivers)<br>NavuCore |

## Related Articles:

Note Type Setup
Account Level Notes
Site Level Notes